



October 2015

# Global Field Service Support

## Site Task Definition Document



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<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	1 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

## 1.0 Introduction

This document is concerned with work undertaken, in fulfilment of a Contract or Order, at a location remote from Company premises. The Document covers staff whose primary function is to undertake work on customer's equipment at remote locations. Also covered are those staff who normally perform their duties on Company premises, but are required to support such off-site activities, as the occasion demands.

For the purpose of this Document the remote location at which the task is to be carried out is referred to as the Site. This work may be performed either in the United Kingdom or overseas.

## 2.0 References

TBA

## 3.0 Purpose

The purpose of this Document is initially to circumscribe the entire work package associated with a given task, including the preparation activities undertaken in Company, the actual performance of the identified task on site, and the completing activities required on return to the Company.

Considering the various responsibilities concerned with planning, organizing, implementing and supporting the task follows this, and finally, to prescribe the administrative framework within which the task is to be undertaken.

This Document is intended to cover the broad aspects of Site Working only and shall be supported by appropriate Working Instructions. In addition, its provisions may be modified by Project Specific Instructions/Documents, as circumstance demand.

## 4.0 Responsibilities

### 4.1.0 General

In the Company, work required against a contract or order is authorized by the allocation of a Works Authorization (WA) number and the appointment of a Project Manager / Customer Support Manager with responsibility for its satisfactory execution and completion.

The Project Manager / Customer Support Manager is responsible to senior management for all equipment and services required to be provided under the Contract.

The authorizing and control of work required to be undertaken in the fulfilment of the customer's contract or order, is by Works Orders (WOs) raised against the originating WA. Each WO, at the Project Manager's discretion, has a delegated responsibility for the task.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	2 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

#### 4.2.0 Site Working

In the conduct of the Company's business, the majority of tasks involving Site working are connected with:

- Installation and Commissioning- Installation, Setting to Work and Acceptance of Equipment supplied to the Customer under the Contract.
- Field Support
  - Undertaking Investigation/trials on the Customer's Equipment, either in support of or on behalf of the Customer.
  - Calibration and Maintenance of customer's Equipment
  - Modification and Repair of customer's equipment

Of the three areas of work given above, the first two are the more common and frequently demand the employment of significant teams, comprising Field Service and/or Engineering Support, Engineering, Production, and Quality Assurance staff. Accordingly, this Document has been prepared to accommodate the wider needs of Installation, Setting to Work and Acceptance activities, and assumes that other types of activity will be covered by its broad prescription.

#### 4.3.0 Organization for Site Working

Within the Company, the departments with a primary responsibility for undertaking Site Working are the Engineering Support Departments, and the Customer /Field Support Department.

Customarily, the Manager of the Customer Support Department has been given responsibility for tasks relating to contracts from overseas customers.

For the purposes of this document, the member of staff responsible for managing the Site tasks shall be known as the Team Leader.

Staff with the appropriate skills, in agreement with their respective managers, may be made available from a wide range of departments across the Company, as required. Irrespective of from which department the staff may be drawn, once identified and made available, they will be seconded for the duration of the task and placed under the direction of the Project Manager / Customer Support Manager with the delegated responsibility.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	3 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

## 5.0 Administrative Framework

### 5.1.0 Scope

The appointed Project Manager/Customer Services Manager shall assume responsibility for establishing and initiating, the administrative framework within which the particular task will be conducted. It may include, but not be limited to, the elements given below:-

- Travel arrangements for personnel
- Shipping arrangements for equipment
- Agreement of staff subsistence and allowance rates
- Arrangement of accommodation for staff
- Arrangement of storage of equipment and documentation
- Provision for protective containers for equipment and spares
- Arrangement for recording of test results and other relevant data
- Security arrangements for staff equipment and documentation (refer to the Company Security Controller)
- Medical requirements
- Insurance requirements for both staff and equipment (refer to the Personnel Department)
- Financial arrangements
- Communication arrangements
- Communication arrangements
- Identification of pertinent Site environmental cultural aspects and customs
- Establishing of customer interfaces
- Arranging of Project brief
- Initiating of project specific procedures
- Arranging of In-Company support facilities
- Acceptance criteria and specification

In making the administrative arrangements for the task, the relevant Company Processes and Instructions shall be complied with. Any deviation must be agreed beforehand with the appropriate authority.

As part of the preparation work and at the commencement of the task planning activity, the Project Manager / Customer Support Manager shall prepare a checklist of all administration requirements to be actioned. See Annex A.

At the completion of the planning and organization stages, each requirement shall record any special provisions; agreements and arrangements made which may be considered relevant to its effective execution.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	4 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

## 5.2 Administration Requirements

### 5.2.1 Travel Arrangements

The appropriate modes of travel within the UK, leaving and returning to the UK and/or the site, are to be determined and agreed.

The requisite Travel forms are to be completed by or on behalf of each member of staff approved and formally authorized.

Arrangements for the availability of vehicles, whether by hire or lease is to be made via the appropriate Travel Form.

Confirm that all members of staff who may be called on to drive, during off-site working, have completed a Company driving declaration form.

For overseas travel, verify that the traveler's passport has a minimum of six months validity.

### 5.2.2 Shipping Arrangements

Confirm the arrangements for the timely arrival on Site, of equipment, tools, test equipment, spares and documentation with the Company Shipping Department, if shipped independently.

Confirm that similar arrangements are in place for the return of relevant equipment.

The need for facilities and procedures for the hand-carriage of equipment and documentation, between the Company premises and the Site, accommodating Customs and import-export requirements, are to be determined and agreed.

The need for making any provision for a special transit facility for the rapid movement of defective and replacement items between the Company and the Site, during the execution of the task, is to be determined and agreed.

### 5.2.3 Staff Subsistence and Allowances

Prior agreement as to the levels of subsistence appropriate to members of the task team must be obtained in conjunction with the Personnel Department. In addition, the applicability and level of any special allowances, which may be paid to members of the team, is to be similarly agreed.

Staff are to be made aware of the subsistence levels determined and agreed for the task, and an appropriate mechanism initiated for effective control of expenditure. At the same time, the staff are to be made aware of any agreed allowances, and the conditions under which the allowance will be paid.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	5 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

#### **5.2.4 Accommodation and Facility Requirements**

Make arrangements for staff hotel accommodation or apartments as appropriate, for the duration of the task.

Make provision for staff office accommodation, complete with the required facilities, eg. Power points, telephone, Fax machine, furniture, document store etc.

Arrange for storage of spares, test equipment and tools, and make provision for access to workshop facilities, as required.

Make arrangements for special facilities, such as lifting gear and access platforms.

#### **5.2.5 Local Site Requirements**

Make provisions for any local working practices and procedures details of which shall be contained in the task definition.

#### **5.2.6 Security Requirements**

Ensure that the security clearances required enabling site staff to gain access to and carry out work on the Site, have been obtained prior to the commencement of the task.

Arrange for the availability of secure stowage for such equipment as may be necessary, and for the provision of security cabinets for task documentation.

Identify and agree the need for the vehicle/procedure to be used for the transmission of classified or Company sensitive data (verbal and written).

If necessary, a project instruction will be prepared, which will determine any special security requirements or procedures to be followed, while on Site. This instruction will accommodate both the needs of the customer and company commercial aspects.

#### **5.2.7 Medical Arrangements**

Information is to be obtained from the Company Nurse, of the general and special immunization; inoculation and travel pack needs for the area to be visited.

Staff are to be advised of the requirements, and arrangements to be made with the Nurse, for all team members to be provided with the necessary protection.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	6 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

The availability of medical services, accessible from the Site, for the treatment of both minor and more serious conditions is to be ascertained. Provision is to be made to cover the costs involved with the potential use of such facilities, as may be required.

Any conditions for the use of the indigenous medical facilities, and the procedures to be followed, are to be clearly defined and advised to all staff.

The circumstances of emergency medical repatriation to the UK, and the procedures to be followed, are to be determined and advised to the team.

If practical, staff involved in Site working should receive basic First Aid Instructions.

Staff are to be made aware that it is essential that they should individually report any incident that required medical attention, while away from the Company in support of the task, to the Company on return to the UK.

### **5.2.8 Insurance**

Determine whether any special insurance cover will be required to accommodate the transit and/or use of equipment and facilities employed off Company premises. Ensure that familiarity is acquired with the standard cover available from the Company's general insurance arrangements.

Confirm that the insurance cover governing the employment of Company staff on Site is adequate for the task and is fully understood by all members of the team, together with any special conditions and limitations.

### **5.2.9 Financial Arrangements**

Each member of staff will be responsible for obtaining adequate cash advances, to satisfy their personal expenses, through their own cost center. Each trip, if more than one, shall be separately funded.

One member of the team will be identified, if appropriate, and appointed to take care of any team expenditure, miscellaneous expenses and extraordinary items, related to the task, which may reasonably (and within Company guidelines) be encountered.

A route will be established to allow additional currency to be obtained, either from the Company in the UK or by local arrangement, to cover the unexpected.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	7 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

### 5.2.10 Communications

Any special needs of the project will be identified and contained in the task definition. This may include medium, frequency and points of contact, both with the Company in the UK and the Customer.

The levels at which formal and informal communication, whether verbal or written, are to take place, will be defined. This in particular relates to matters concerned with decisions and/or discussions to explore possible solutions to program, contractual or technical problems.

### 5.2.11 Laws, Customs and Culture

If not already available, a Brief may be prepared, which identifies the relevant laws peculiar to the locale within which the task will be undertaken; draws attention to local customs that should be acknowledged by all staff during the course of their duties and leisure intervals; identifies Customer regulations with which compliance is necessary in undertaking the work associated with the task, and, points out cultural differences with the UK that may affect the ability to communicate with the Customer's representatives.

### 5.2.12 Customer Interfaces

The Customer's representatives will be identified, together if possible, with their responsibility, in relation to the task.

Company representatives will also be appointed, where practicable, in conjunction with the Project Manager / Customer Support Manager with a responsibility to maintain and service the Customer Interfaces, as will be determined by the progress of the task.

### 5.2.13 Project Brief

A Marketing Brief may be obtained and provided to the project. This will relate to the duties in the conduct of the task, and possible contact with the Customer's representatives.

Such a Brief may be prepared which will outline the work to be undertaken, the conditions to be observed and the results to be achieved. It will also, as far as possible, identify the roles to be adopted by each of the team members.



<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	8 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

### 5.2.14 Project Procedures

The requirement for project specific procedures and/or working instructions will be assessed as part of the task planning stage.

Such procedures and working instructions will be prepared before the commencement of the Site activity and agreed with the Project Manager / Customer Support Manager and included in the task definition.

### 5.2.15 In-Company Support

Depending on the size, extent and duration of the task, it may be advisable to arrange a single point of contact resident on the Company's premises in the UK. This point of contact will act as a focus for all communications with the team on the Site.

The duties, responsibilities and limits of authority will be clearly defined, in a written statement, and agreed with the appointee.

All members of the team will be made aware of the support function facility and its role in the life cycle of the project task. Details will be recorded in the task definition.

## 6.0 Task Planning and Organizing

### 6.1 Scope

It is the function of the Project Manager / Customer Support Manager to agree the scope of work to be undertaken in fulfilment of the designated task.

As a precursor to the start of the planning activity, the Project Manager / Customer Support Manager will make himself familiar with the relevant contractual conditions related to the task and resolve any ambiguities or matters of interpretation.

In accordance with the prepared 'check list' Annex B the planning and organizing activity will include, as appropriate:

- Definition of the task. (i.e. for trials, objectives and how they will be met)
- Preparation and agreement of the budget for the task
- Ascertaining the Design and Build standard of the Equipment, which is the subject of the task
- Determining the issues of the related software and firmware
- Identifying test equipment, tools and facilities required for the task
- Identifying spares to support the task

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	9 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

- Identifying document requirements: handbooks, specifications etc.
- Determining the acceptance process and procedure
- Ascertaining the requirements for project procedures and instructions
- Preparing inventories, resource requirements and program for the task
- Establishing repair facilities
- Determining shipping requirements
- Classification of task
- Completing administrative arrangements

### 6.2.1 Task Definition

Based on the scope of work agreed, the Project Manager / Customer Support Manager will prepare a detailed definition of the task within the confines of the Contract and the Customer's agreed timescales.

Determine the extent of equipment interfaces with other non-Company equipment/systems, which may influence the implementation of the task. Confirm the adequacy of the controlling specifications.

It may be necessary (Project Managers discretion) to send personnel to the site to evaluate the status/suitability of the environment prior to the dispatch of the team and associated tools and test equipment.

### 6.2.2 Task Budget

Prepare an estimate of the cost of undertaking the task in all its phases, including allowances for rework. Make suitable provision for delays resulting from Customer dependent actions.

### 6.2.3 Equipment Design and Build Standards

Obtain a statement of the Equipment build standard and receive confirmation that the Subject Equipment is compliant with the task definition.

Carry out a check that the Equipment design standard is reflected in the various specifications which are required to undertake the task and that the build standard is consistent with the declared design standard. This may involve an on-site inspection to confirm build standard.

From the assessment of the design and build standards, confirm the extent of modifications, which have to be incorporated in the field, as part of the task.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	10 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

Arrange the timely availability of the relevant Mod Kits.

#### **6.2.4 Software and Firmware Issues**

For the declared design standard of the Equipment, ascertain the status and issue of the software which is to be used as the basis of the task, and obtain a certified, configured copy of the conduct of the task.

In preparation of the task, determine the issues of all the applicable firmware, and confirm that they are consistent with the declared design standard and reflected by the build standard.

#### **6.2.5 Tools and Test Equipment**

From the appropriate specifications, develop an integrated list of tools, test equipment, commissioning software and facilities, which will be required for the task.

Ensure that the list of tools includes handling kits for use by all relevant staff, when handling electrostatic sensitive devices.

Ascertain and arrange the availability of all tools, test equipment, commissioning software and facilities, and their satisfactory condition for use during the execution of the task.

Ensure that all test equipment will have valid calibration certificates for the duration of the task. Alternatively, that provision is made for calibration on Site or that the timely replacement of test equipment can be achieved.

Ensure that all applicable, tools and appropriately registered, with valid inspection certificates.

Confirm that adequate transit packs for all tools and test equipment, are or will be made available, to meet the demands of the task.

#### **6.2.6 Support Spares**

Determine whether the equipment will be supported from the Customer's Spares Holding during the implementation of the task, or is to be supported by the project.

Confirm and arrange the availability of any necessary required parts, and if they are to be shipped out in support of the task that adequate transit packs are, or will be made available.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	11 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

### 6.2.7 Documentation

Determine the Documentation that will be required to undertake the task and arrange its timely availability. This may include but is not limited to:

- Equipment Handbooks
- Installation Specification
- Commissioning (Setting to Work) Specification
- Trails Specifications containing trials objective and method of achievement
- Modification Work Schedules and Instructions
  - Ensure that all documents reflect the design and build standards of the Equipment, and include any modifications, which are to be incorporated into the Equipment, as part of the task.
  - Identify the forms required to conduct the task and ensure that a ready supply is available. These may include but are not limited to:
- Equipment Logs and Build Standard Report forms
- Failure Occurrence Report forms
- Site Inspection Report (S.I.R) See Annex C
- Engineering Report Form (E.R.F) See Annex D

(E.R.F to be raised by the Team Leader and submitted to the Project Manager)

- Acceptance forms

### 6.2.8 Acceptance Process

Ascertain what will contractually constitute 'Acceptance', and ensure that full provision is made to gain acceptance of the task activity.

Identify any procedures that may be associated with the acceptance process, and ensure that they will be satisfactorily accommodated for completion of the task.

### 6.2.9 Project Procedures and Instructions

Identify any requirement for project specific procedures and/or working instructions, which will be necessary to either perform or control the task.

Prepare the appropriate procedures and working instructions and ensure that they have formal authorization and approval, before the commencement of the task.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	12 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

### 6.2.10 Inventories, Resources and Program Plan

Compile consolidated inventories of all equipment, facilities and documentation, which will be required to undertake the task.

Determine the extent of the resources, which will be required to satisfactorily complete the task, and confirm the potential availability of suitably skilled staff, within the time frame of the task.

Identify any special training, needs for task personnel and determine and implement the manner by which the requisite levels of training will be achieved.

Prepare a detailed program plan for the task, which will meet the contractual or subsequent, Customer-agreed-Timescale, for undertaking the task.

### 6.2.11 Repair Facilities

Consider the potential need and organize access to an effective and timely task support repair facility, either within the Company or at a convenient location near to the task Site, during the course of the work concerned with the task.

Determine the levels of repair and turn-round times to be accomplished by the facility and confirm the requirements with the appropriate authority.

Establish the mechanism for accessing the facility and controlling the cost and throughput of items returned for repair.

### 6.2.12 Shipping Requirements

From the inventories of equipment, facilities and documentation prepared above, determine the extent of the shipping arrangements, which will be required and, in conjunction with the Company Shipping Department, arrange for the timely shipment of all items, to and from the Site as required.

Confirm that all necessary packing design has been accomplished and that a suitable packing facility will be made available.

Establish facilities and procedures for the hand-carriage of equipment and documentation, between the Company premises and the Site, accommodating Customs and import/export requirements.

### 6.2.13 Classification

Determine the classification of the task to be undertaken and take appropriate security action.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	13 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

## 6.2.14 Administrative Arrangements

Confirm that all Task administrative arrangements have been accommodated, in accordance with the 'check list' prepared at the commencement of the Task planning phase. (See Annex A).

## 7.0 Task Implementation

### 7.1.0 Introduction

The implementation of particular tasks shall be bounded by the agreed scope of work and the detailed task definition, prepared by the Project Manager / Customer Support Manager.

However, for the majority of tasks, there are several activity standards and procedures that will remain common. It is the purpose of this section to identify and scope these common elements.

### 7.2.0 Common Requirements

#### 7.2.1 Site Supervision

It shall be the Policy of the Company for the Project Manager / Customer Support Manager to appoint a team member as Team Leader. The Team Leader shall assume overall supervisory responsibility for the task and all its subsidiary elements. In a situation where the team and thus the membership change, the role will be re-allocated to ensure continuity of supervision. There shall only be one supervisor at any given time.

The responsibility of the Team Leader shall be to act as team coordinator and Company representative in discussions with the Customer.

The Team Leader shall, in discussion with the other specialist team members, seek to resolve difficulties of Equipment or Site access agree priorities and endeavor to maintain a harmonious working relationship between the members of the team and with the Customer's representatives.

The Team Leader may not be technically responsible for the work of other specialists. Team members may owe technical responsibility for all activities directly to the appointed Design Authority.

The Project Manager / Customer Support Manager may, as overall authority for Site work, subsume some or all the responsibilities of the Team Leader, when on site.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	14 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

### 7.2.2 General Site Responsibilities

The care and safeguarding of the Equipment logbooks shall rest with the Team Leader, but it is the responsibility of each team member, with a need to make an entry in the logbook, to ensure that neat, clear and adequately descriptive entries are made. Such entries may include but are not limited to:

- Work carried out during the day
- Changes to the Equipment Build Standard
- Problems encountered during the course of the work, even if not resolved at that time
- A record of Failure Reports completed

Failure Reports shall be completed by the team member(s) who discerned the fault condition and assisted in its rectification. The report will be completed in accordance with the Company Management System and may include:

- Fault(s) detected
- Units removed and replaced from the Equipment
- Deviations from the original build standard
- Occurrences that could affect the build standard or operational state of the Equipment, or to other Customer equipment's or spares holding

Site Reports shall be prepared by the Team Leader, at a frequency and in a format to be defined in the project specific Working Instructions. Such Reports are to be provided a periodic record of the Task progress, for communication to the Project Manager.

### 7.2.3 Site Working Practices

Working Practices employed on Site shall comply with current Company standards, unless agreed and defined differently by an appropriate project Task Definition.

Where conditions dictate, safety Equipment shall be utilized at all times.

Where provided by the Company, appropriate overalls or other protective clothing shall be worn.

Care is to be exercised in handling the Equipment, irrespective the actual contractual situation. In particular and where appropriate, care shall be taken to ensure that the Site team and the Customer's staff observe static sensitive handling procedures.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	15 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

#### **7.2.4 Conduct the Company Personnel on Site**

Staff shall remain conscious that they are representatives of the Company and shall conduct themselves accordingly.

Care shall be taken to safeguard the Company's commercial interests by exercising discretion when in the company of and in discussion with, the Customer's representatives. Commercially sensitive or classified material shall be protected from unauthorized view.

Recognition shall be given to local laws, customs and cultural differences from accepted UK standards, and care shall be taken to avoid giving offence.

#### **7.2.5 General Communication Requirements**

Written communications shall be in accordance with current Company standards, unless stated to the contrary in the Task Definition.

The registering, distribution and timeliness of copies of all correspondence and other documentation shall be as defined in the appropriate instructions.

Care shall be exercised in the use of telephones and facsimile facilities, when dealing with commercially sensitive issues.

Classified information shall only be passed through authorized channels.

Discussions with the Customer, during which agreements are obtained or decisions made, shall be recorded and referred to Project Manager. Such confirmation should itself be agreed in conjunction with the Customer and signed by both parties, preferably before concluding the meeting.

#### **7.2.6 In-Company Support**

Requests from Site for In-Company Support will normally be directed via the Team Leader to the Project Manager, unless specifically arranged.

### **8.0 Post Activities**

#### **8.1 Introduction**

The Task may not be considered complete until all reporting and administration activities have been attended to.



<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	16 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

It is the responsibility of each member of the team, under the general guidance of the Project Manager, to complete this the final phase of the Task, on his or her return to the Company. Attention is drawn to the more obvious activities in Section 8.2, but the scale and type of overall Task will determine the full extent of the requirements.

## **8.2.0 General Requirements**

### **8.2.1 Task Final Report**

It is the responsibility of the Team Leader and the Project Manager / Customer Support Manager to prepare issue and distribute a Final Report.

The Report shall be a comprehensive statement of actions and achievements relating to the work undertaken on the Site and the support required from the Company. Use may be made of the individual team member reports.

The Report shall include, as an appendix or make reference to, all key documentation produced as part of the Task. Such documentation may include but not be limited to:

- Confirmatory Build Standard of the Task Subject Equipment
- Copies of certified and signed Acceptance Certificates
- Copies of test results from the acceptance testing
- Copies of agreed records of meeting with the Customer
- Copies of all correspondence with the Customer

The distribution of the Final Report shall take account of the task contractual requirements with regard to the supply of copies to the Customer. For internal distribution, the minimum distribution shall apply, Project Manager, Team Leader, Customer Support Manager and Quality Manager. Further distribution of the report will take account of actions arising from the results of the task, sensitivity of the information contained in the report and the requirements of other interested parties.

### **8.2.2 Notification of Task Completion**

It is the responsibility of the Project Manager / Customer Support Manager to notify the Contract Authority of Task completion.

Copies of Acceptance Certificates, and of other relevant Documentation, shall be handed to the Contract Authority. In addition, a verbal brief of possible issues should be given, support where necessary by a written summary.

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	17 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

### 8.2.3 Medical Report

A report shall be made to the Company Nurse, by individual team members, immediately on their return to the Company, of any condition, which required medical attention.

Any special medical packs received from the Nurse, and unused during the Task, shall be returned to the Nurse.

### 8.2.4 Tools and Test Equipment

Tools and Test Equipment employed on the Site on arrival at the Company will be inspected, collated and returned to store.

Any requirements for repair, re-certification or re-calibration shall be initiated.

### 8.2.5 Task Spares Kit

Spares taken to the Site shall on return to the Company be checked against the originating inventory and returned to store.

Any requirements for repair or replacement shall be identified and actioned.

### 8.2.6 Expense Claims

Team members shall complete appropriate claims for expenses incurred during the course of the Task. The balance of any cash advances or travelers checks shall be returned to the Accounts Department and a suitable receipt obtained to accompany the relevant claim for expenses.

## 9.0 Records

### 9.1.0 OMC-FSS-002 Field Service STDD Form

<b>Operational Management Consultancy</b>	<b>DIVISION</b> Operating Procedure <b>Global Field Service Support</b>	<b>OMC-FSS-001</b>	
		Revision: 00	
		Date:	Oct 2015
		Page:	18 of 18
<b>Title: Global Field Service Support</b>			
Prepared by: Neil Taylor	Reviewed by:	Approved by:	

### Revision Log

Rev. No.	Description of Change	Revised By	Date