

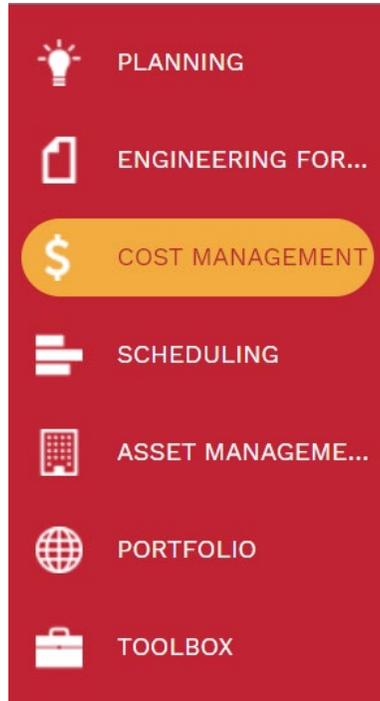


**PM**

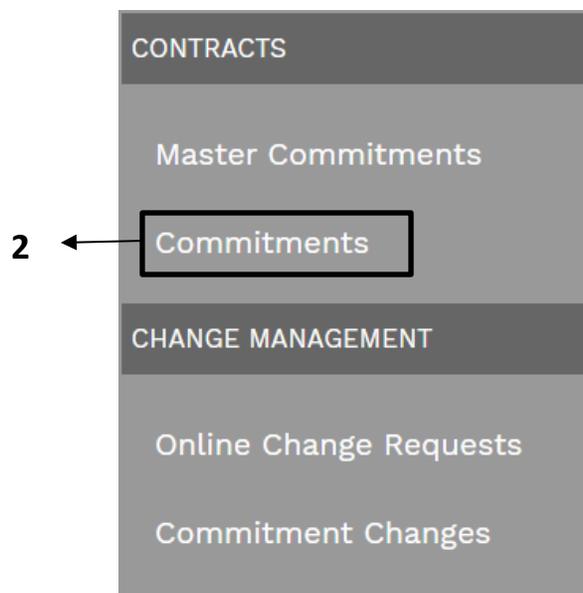
**Migrating Contracts-Commitments**

**Migrate executed Contracts into PM Web**

1- Click on **Cost Management**.



2- Under **Contracts**, select **Commitments**.



3- Click on **+Add** in the top bar



4- **Project** field - Select the project from the Project drop down menu

5- **Contract #** field – will auto populate with next sequential number

6- **Company** field - Select from the Company drop down menu

7- **Description** field – Enter '**Migration**- 'followed by a brief descriptive. Utilizing the term 'Migration' will trigger the abbreviated work flow.

8- **Type** field – Select **NA** if a A/E design or construction contract OR **Project Management CSA** if utilizing a CSA

9- **Agreement Type** field – Select from the Agreement drop down menu

10- **Status/Revision** - Select

11- **Days** field – Enter duration

12- **Paid in full** – **Do not select**

13- **Billing** – select **Do not allow over billing**

14- **Billing Terms** – select **Net 30**.

15- **Retention on Services** – Utilize **5%**. Other percentages must be justified and approved by the PPM.

16- **Retention of stored material** – Typically **15%**.

17- **Issuer** field – Enter **FBOC**.

18- **HB1295 Reported** – leave blank.

19- **HB1295 Approved** – leave blank.

20- **BOR Approved Amount** field – Enter approved amount, if applicable.

21- **Vendor Project Manager** field – Enter Vendor Project Manager name.

22- **K Number** field – leave blank.

23- Click on **Save** button at top header.

The screenshot shows a software interface with a top navigation bar containing a menu icon, a search bar, and a '+Add' button (23). Below the bar is a form with the following fields:

- Project\* (4)
- Contract No. (5)
- Company (6)
- Description (7)
- Type (8)
- Agreement Type (9)
- Status / Revision (10)
- Days (11)
- Paid in Full (12)
- BILLING (13)
- Billing Terms (14)
- Retention on Services (15)
- Retention on Stored Materials (16)
- DO NOT ALLOW OVERBILLING (13)
- ALLOW OVERBILLING

In the center is a 'RECAP' table with columns for 'COSTS' and 'DAYS':

	COSTS	DAYS
Original Value	\$0.00	0
Approved Changes	\$0.00	0
Revised Value	\$0.00	0
Billed	\$0.00	
Retained	\$0.00	
Balance Due	\$0.00	
Payments Applied	\$0.00	
Open Balance	\$0.00	
Unbilled	\$0.00	
Pending Changes	\$0.00	0
Projected Value	\$0.00	0

On the right is a 'USER DEFINED FIELDS' section with the following fields:

- Issuer (17)
- HB1295 - Reported (18)
- HB1295 - Approved (19)
- BOR Approved Amount (20)
- Vendor Project Manager (21)
- K Number (22)

24- In the lower bar, click on **+Add** button.



25- Click **"Cost Code"** field – Select from Cost Code drop down menu. *"Description" field – This will auto-populate based on "Cost Code" selection.*

26- Click **"Ext. Cost"** field – Enter amount.

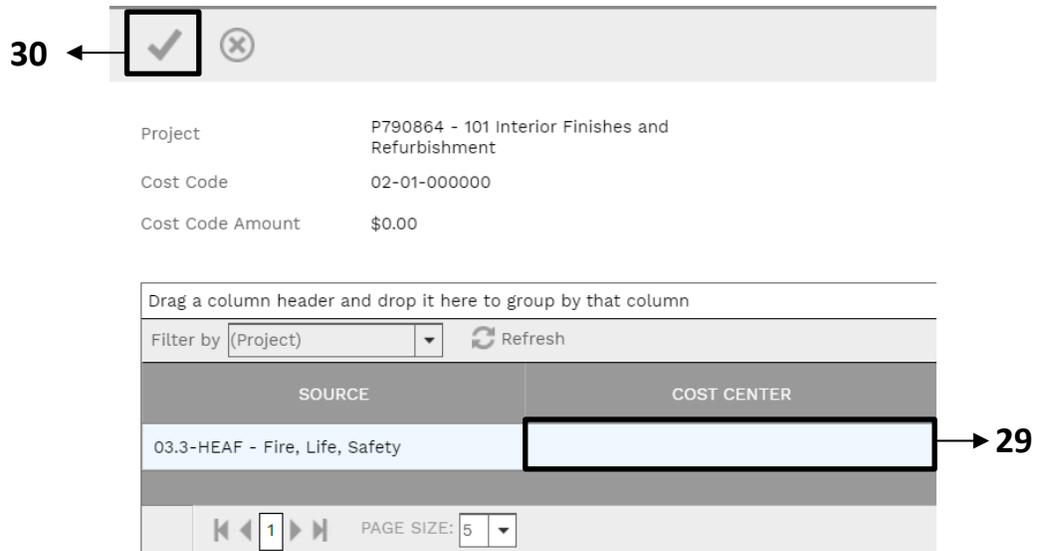
27- **"Total Cost" field** – This will auto-populate based on "Ext. Cost" amount entered

28- In the "Grey" header bar click the **Save** button.



29- Select the box next to the **Funding** field . In the pop-up window, select the **cost centers** to fund the line.

30- Click on the **Checkmark** on the top left.



**31-** Select the “UH Fields” tab.

**32-** Under the “Project Information”, double click “Overview or Justification” – Enter brief descriptive explanation.

**33-** Double click “Project Scope of Work” – Enter brief descriptive explanation.

**34-** Double click and enter “Start Date”.

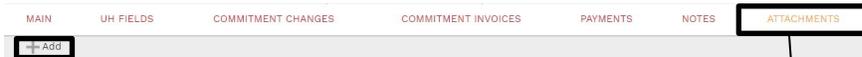
**35-** Double click and enter “End Date”.

**36-** Under the “Project Information” tab at the bottom, double click “Campus”

**37-** In the “Grey” header bar click the **Update record** button.

UH FIELDS		
Edit		
UH FIELD	DATA	NOTES
Overview or Justification	<b>32</b>	
Project Scope of Work	<b>33</b>	
Start Date	<b>34</b>	
End Date	<b>35</b>	
Campus	<b>36</b>	

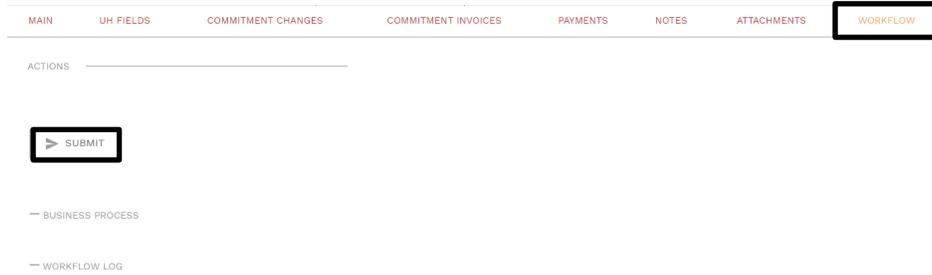
**38-** Under the “Attachments” upload the contract from **Document Manager**.



**38**



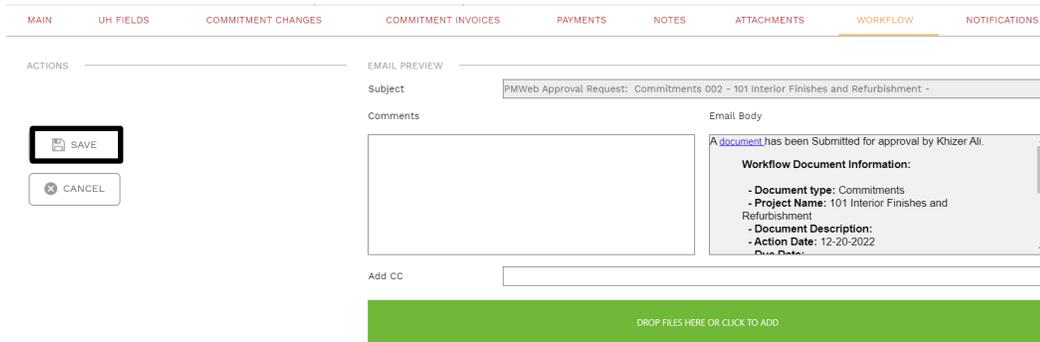
**39-** Under the **'Workflow'** tab at the bottom, click on the **Submit** button.



**40-** When the screen automatically refreshes, review the workflow to ensure abbreviated workflow is being utilized.

**41-** Click on the **Save** button in the Actions section.

**42-** The workflow will reroute the record to you.



**43-** Under Actions select **'Final Approve'**.

**44-** Click the **'Save'** button.



**45-** Process Complete.