

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.

Project*	4	-	RECAP			USER DEFINED FIELDS		
Contract No.	5			COSTS	DAYS	Issuer	17	
Company	6	-	Original Value	\$0.00	0	HB1295 - Reported	18	Ê
Description	7		Approved Changes	\$0.00	0	HB1295 - Approved	19	Ć
Туре	8	-	Revised Value	\$0.00	0	BOR Approved	20	
Agreement Type	9	-	Billed	\$0.00		Amount	20	
Status / Revision	Draft 10 -	• 0	Retained	\$0.00		Vendor Project	21	
Days	11	0	Balance Due	\$0.00		Manager		
Paid In Full	□ 12		Payments Applied	\$0.00		K Number	22	
BILLING			Open Balance	\$0.00				
Billing Terms	14	-	Unbilled	\$0.00				
Retention on Services	15	10%	Pending Changes	\$0.00	0			
Retention on Stored Mate	erials 16	10%	Projected Value	\$0.00	0			

24- In the lowe	r bar, click on +Add	button.	
	+ Ac	bb	
 25- Click "Cost This will autors 26- Click "Ext. 0 27- "Total Cost 28- In the "Green the the the the the the the the the the	Code" field – Select to-populate based o Cost" field – Enter a " field – This will au y" header bar click	et from Cost Code drop down menu. <i>"Description" f</i> on "Cost Code" selection. amount. uto-populate based on "Ext. Cost" amount entered the Save button.	fiela
🖺 Save 🛞 Cancel			
LINE # ATTACHMEN		DESCRIPTION EXT. COST TOTAL COST NOTES TOTAL COST TOTAL COST TOTAL COST TOTAL COST TOTAL COST TOTAL COST TOTAL COST TOTAL COST	•
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- **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.

MAIN	UH FIELDS	COMMITMENT CHANGES	COMMITMENT INVO	ICES PAYMENT	S NOTES	ATTACHME	NTS WORKFLOW	NOTIFICATIONS	
Projec	t Information	🖋 Edit							
Hojee	c information	UH FIELD							
CMAR	Overview or Justification	32							
		Project Scope of Work	33						
	Star	Start Date	34						
Contract For	Professional Service	End Date	35						
		Campus	36						

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



MAIN UH FIELDS	COMMITMENT CHANGES COMMITMENT INVOICES PAYMENTS NOTES ATTACHMENTS WORKFLOW
ACTIONS	
SUBMIT	
- BUSINESS PROCESS	
- WORKFLOW LOG	
40. When the scre	een automatically refreshes, review the workflow to ensure abbrev
workflow is be	eing utilized.
41- Click on the Sa	ave button in the Actions section.
42- The workflow	will reroute the record to you.
MAIN UH FIELDS	COMMITMENT CHANGES COMMITMENT INVOICES PAYMENTS NOTES ATTACHMENTS WORKFLOW NOTIFICATIONS
ACTIONS	EMAIL PREVIEW Subject EMWeb approval Request: Commitments 002 - 101 Interior Einishes and Refurbishment -
	Comments Email Body
SAVE	A <u>document</u> has been Submitted for approval by Khizer Ali Workflow Document Information:
CANCEL	Document type: Commitments Project Name: 101 Interior Finishes and Refutisitivent
	Document Description: - Action Date: 12-20-2022 Div Date: 12-20-2022
	Add CC
	DROP FILES HERE OR CLICK TO ADD
43- Under Actions	s select "Final Approve".
44- CIICK LINE Save	
	ACTIONS
	ACKNOWLEDGE Please provide cost center/account code and verify funds are available
	REJECT within People Soft.
	USER DELEGATE
	USER DELEGATE COMMENT
	USER DELEGATE COMMENT SAVE 44