

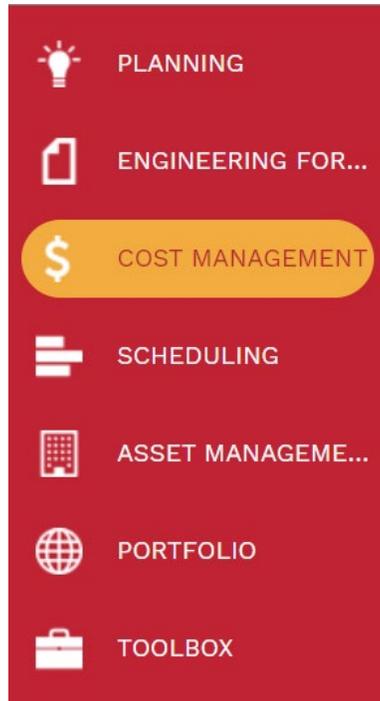
## PM

# Migrating Contracts-Commitments

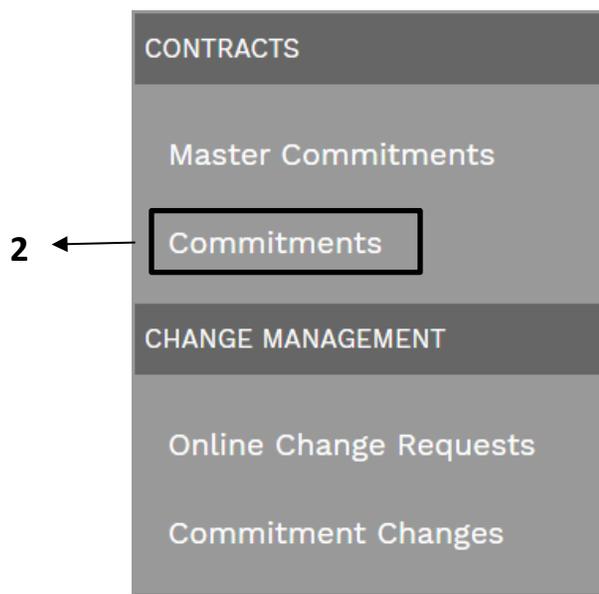
**Overview:** Contracts that are processed outside of PM Web must be manually uploaded to a project as a Commitment record to ensure continuity of data.

**Reference:** n/a

**1- Click on Cost Management.**



2 – Under Contracts, select Commitments



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



3- **Project** field - Select

the project from the Project drop down menu

4- **Record #** field – will

auto populate with next sequential number

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

6- **Description** field – Enter '**Migration**- 'followed by a brief descriptive. Utilizing the term 'Migration' will trigger an abbreviated workflow.

7- **Type** field – Select **NA** if a A/E design or construction contract. For all others select appropriate type.

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

9- **Status/Revision** - displays record status.

10- **Days** field – Enter duration

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

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

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

14- **Retention on Services** – Utilize **5%** for construction contracts and **0%** for all services contracts. Other percentages must be justified and approved by the PPM.

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

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

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

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

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

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

21- **K Number** field – leave blank.

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

23

Project*	
Contract No.	4
Contract No.	5
Company	6
Description	7
Type	8
Agreement Type	9
Status / Revision	Draft 10 0
Days	11 0
Paid in Full	<input type="checkbox"/> 12
BILLING	
Billing Terms	14
Retention on Services	15 10%
Retention on Stored Materials	16 10%
<input checked="" type="radio"/> DO NOT ALLOW OVERBILLING 13	
<input type="radio"/> ALLOW OVERBILLING	

RECAP		
	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

USER DEFINED FIELDS	
Issuer	17
HB1295 - Reported	18
HB1295 - Approved	19
BOR Approved Amount	20
Vendor Project Manager	21
K Number	22

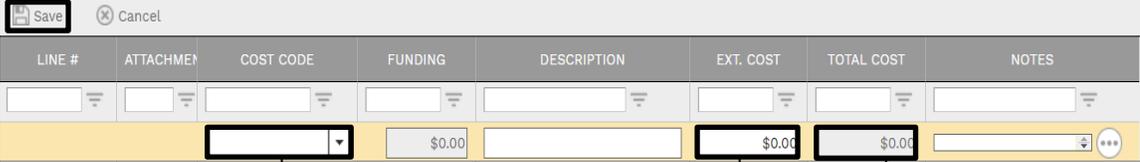
23- In the lower bar, click on **+Add** button.

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

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

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

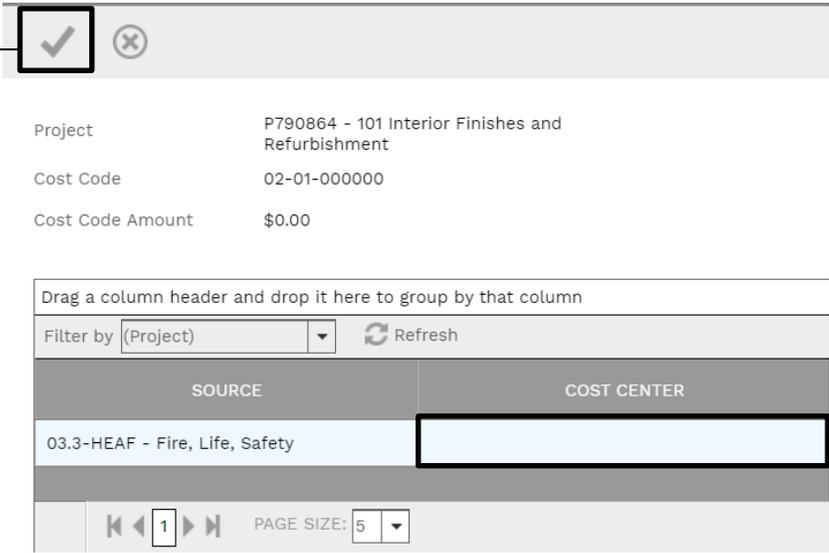
27- In the "Grey" header bar click the **Save** button.



The screenshot shows a form with a grey header bar containing 'Save' and 'Cancel' buttons. Below is a table with columns: LINE #, ATTACHMEN, COST CODE, FUNDING, DESCRIPTION, EXT. COST, TOTAL COST, and NOTES. The 'COST CODE' field is highlighted with a box and an arrow pointing to '25'. The 'EXT. COST' field contains '\$0.00' and is highlighted with a box and an arrow pointing to '26'. The 'TOTAL COST' field contains '\$0.00' and is highlighted with a box and an arrow pointing to '27'.

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

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



The screenshot shows a pop-up window with a grey header bar containing a checkmark icon (boxed and labeled '30') and a close button. Below the header, the following information is displayed:

Project	P790864 - 101 Interior Finishes and Refurbishment
Cost Code	02-01-000000
Cost Code Amount	\$0.00

Below this is a table with columns 'SOURCE' and 'COST CENTER'. The 'SOURCE' column contains '03.3-HEAF - Fire, Life, Safety'. The 'COST CENTER' column is empty and highlighted with a box, with an arrow pointing to '29'. At the bottom, there is a 'Filter by (Project)' dropdown, a 'Refresh' button, and a 'PAGE SIZE: 5' dropdown.

**30-** Select the **“UH Fields”** tab.

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

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

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

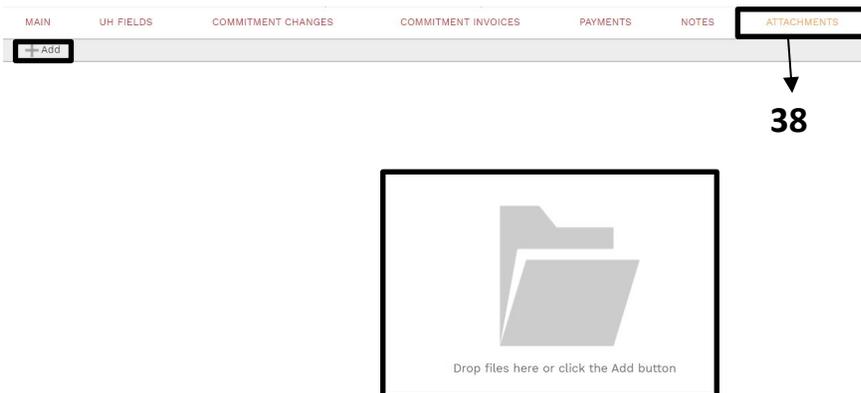
**34-** Double click and enter **“End Date”**.

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

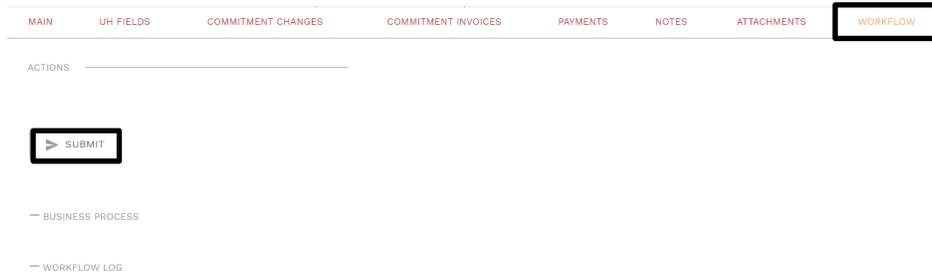
**36-** In the **“Grey”** header bar click the **Update record** button.

UH FIELD	DATA	NOTES
Overview or Justification	32	
Project Scope of Work	33	
Start Date	34	
End Date	35	
Campus	36	

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



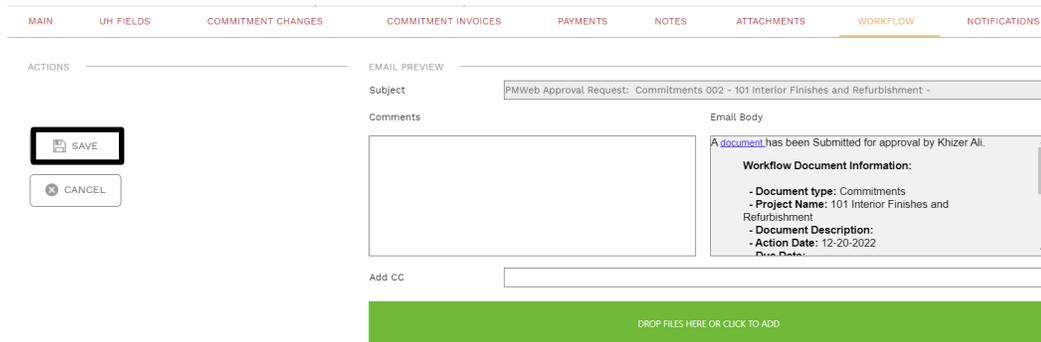
**38-** Under the **'Workflow'** tab at the bottom, click on the **Submit** button.



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

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

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



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

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

**44- Process Complete.**

