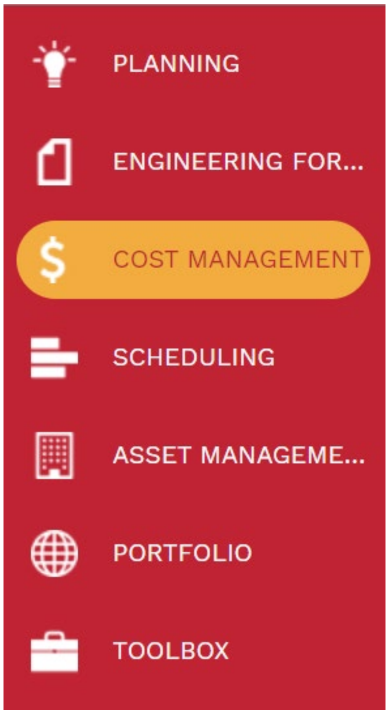
PM

Migrating Contracts-Commitments

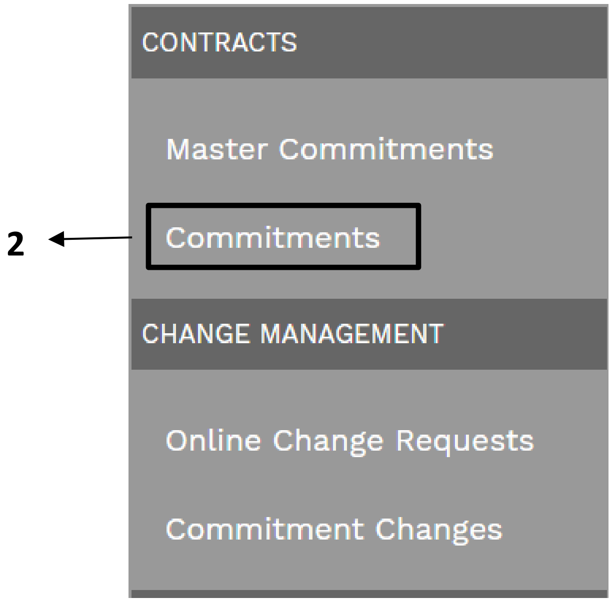
Overview: Contracts that are processed outside of PM Web must be manually uploaded to a project as a Commitment record to ensure continuity of data.

Reference: n/a

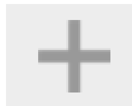
1- Click on **Cost Management.**



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**.**

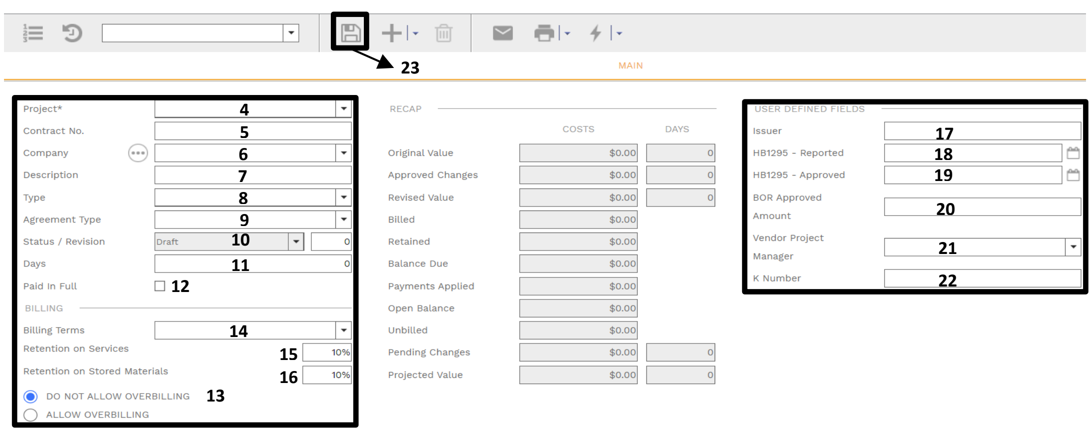
18- **HB1295 Approved –** leave blank.

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.



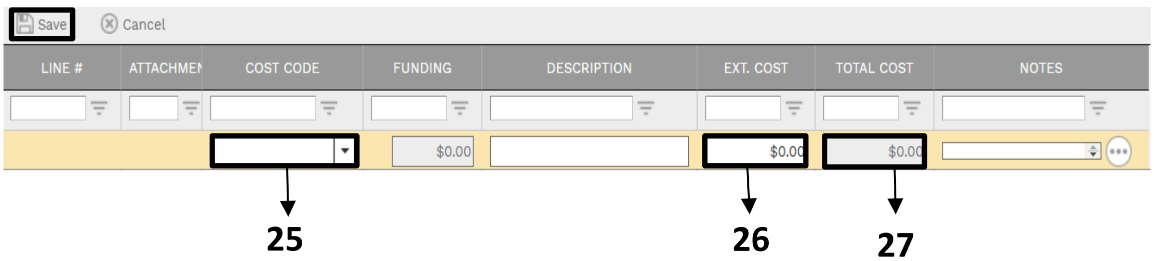
23- In the lower bar, click on **+Add** button.

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.

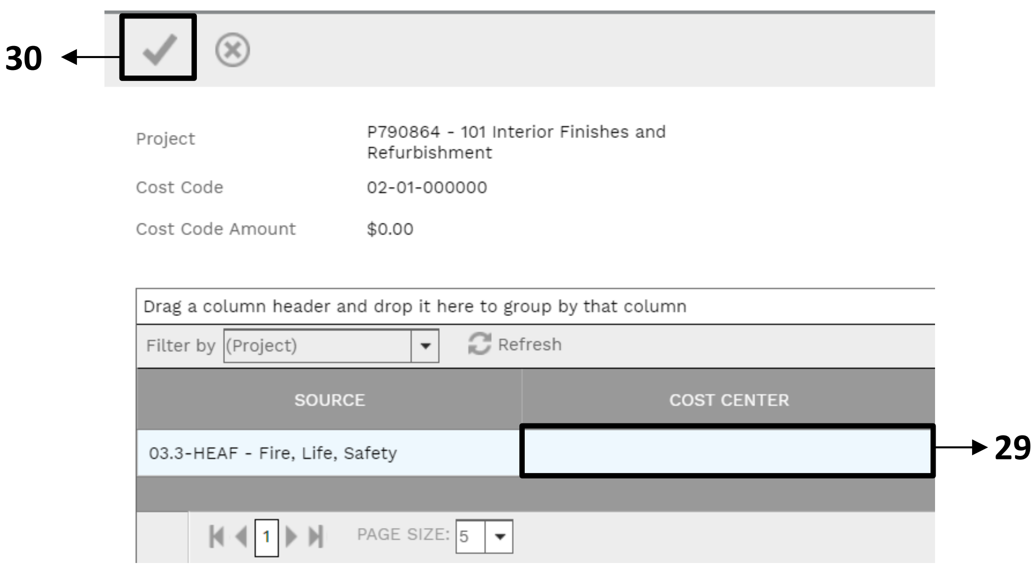
26- ***“Total Cost” field*** *– This will auto-populate based on “Ext. Cost” amount entered*

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



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.



30- Select the "**UH Fields"** tab.

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

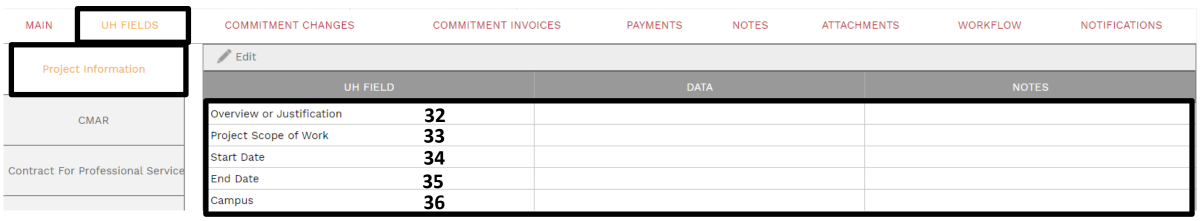
32- Double click "**Project Scope of Work**" – Enter brief descriptive explanation.

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.



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

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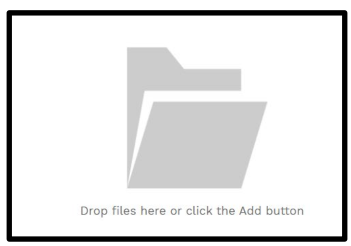
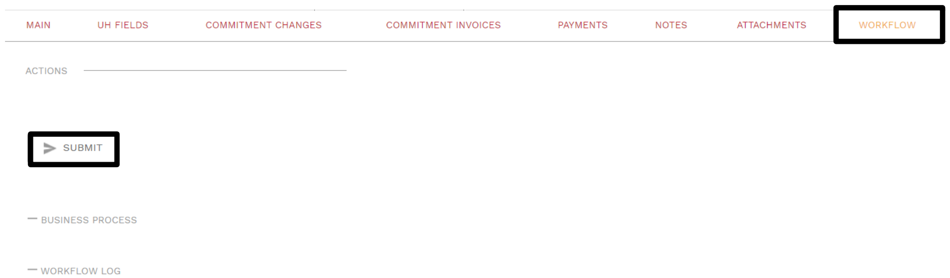


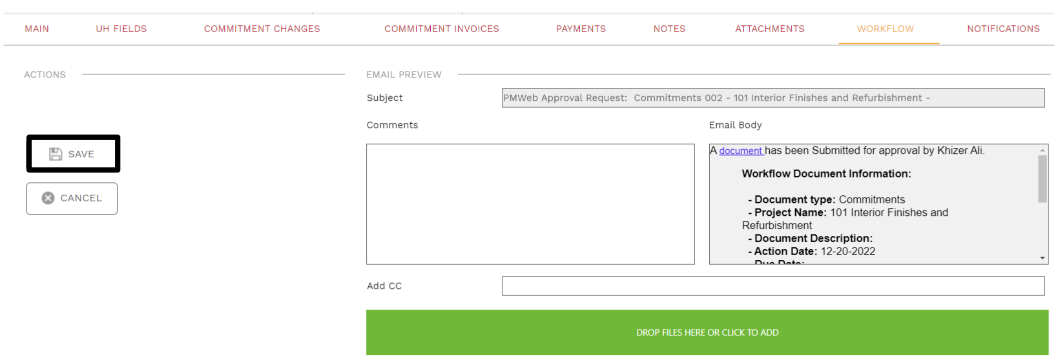
38- Under the '**Workflow'** tab at the bottom, click on the **Submit** button.



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.