

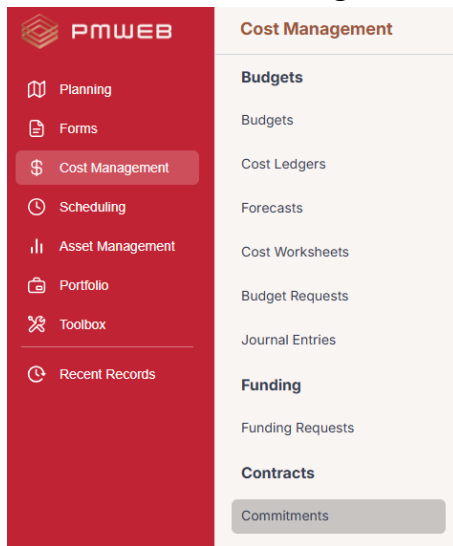
PM

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- Under **Cost Management** select **Commitments**.



2- Click the **New Record** button on the upper right side.

Header Fields

- 3: Project* (dropdown menu)
- 4: Description (text field)
- 5: Company (dropdown menu)
- 6: Agreement Type* (dropdown menu)
- 7: Effective Date (calendar icon)
- 8: Days (text field)
- 9: Workflow Status (dropdown menu)
- 10: Revision (text field)
- 10: Use Units (checkbox)

User Defined Fields

- 11: Issuer (text field)
- 12: HB1295 - Reported (text field)
- 13: HB1295 - Approved (text field)
- 14: BOR Approved Amount (text field)
- 15: Vendor Project Manager (dropdown menu)
- 16: Contract Number (text field)
- 17: K Number (text field)
- 18: NTP Date (calendar icon)
- 19: Initial SC Date (calendar icon)
- Revised SC Date (calendar icon)

- 3- **Project** field - Select the project from the Project drop down menu
- 4- **Description** field – Enter '**Migration**- 'followed by a brief descriptive. Utilizing the term 'Migration' will trigger an abbreviated workflow.
- 5- **Company** field - Select from the Company drop down menu
- 6- **Agreement Type** field – Select from the Agreement drop down menu
- 7- **Effective Date** field – Enter the effective date of the contract
- 8- **Days** field – Enter duration
- 9- **Status/Revision** - displays record status
- 10- **Use Units** box - Do not select
- 11- **Issuer** field – Enter **FBOC**.
- 12- **HB1295 Reported** – leave blank
- 13- **HB1295 Approved** – leave blank
- 14- **BOR Approved Amount** field – Enter approved amount, if applicable
- 15- **Vendor Project Manager** field – Enter Vendor Project Manager name
- 16- **Contract Number** field – Enter contract number as applicable
- 17- **K Number** field – leave blank.

18-NTP Date field – enter Notice to Proceed date

19-Initial SC Date field – enter the initial Substantial Completion date

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

Details

Group by: None Layout: My Custom Layout **New Line**

Line #	Attach...	Cost Code	Description	Ext. C...	Total ...	Fund...	Notes
No records available.							

21- To enter commitment dollar amounts, click on the **New Line** button in the **Details** section.

Details

Group by: None Layout: My Custom Layout **25** **Save**

Line #	Attach...	Cost Code	Description	Ext. C...	Total ...	Fund...	Notes
(0)	03-00	22	Construction Costs	23	\$2,500,000.00	\$0.00	24 on con...

22- In the **Cost codes** column, start typing the name or cost code, then select the desired cost code.

23- In the **Ext. Cost** column, enter the dollar value.

24- In the **Notes** column, provide notes as needed for future reference.

25- Click the **Save** button.

26- Add any additional cost code lines following the same process.

27- Under the **UH Fields** tab, select the appropriate type of contract and enter the data for each field.

28- Under the **Attachments** tab add contracts and other documents.

29- Click on the **Submit** button in the top right.

The screenshot shows a web form titled "Submit Record" with a close button (X) in the top right corner. The form is divided into several sections:

- Header:** A light blue bar contains a document icon, the text "Business Process: FPC - Capital Project - B", a black box with the number "30", and a "View Workflow" button with an external link icon.
- Email Details:**
 - Additional CC:** A text input field.
 - Email Subject:** A text input field containing the text "PMWeb Approval Request: Plan Review - Nick Merry Test - Submission for full s...".
 - Comments:** A large text area for comments.
- Attachments:** A section with a "Select files..." button and a "Drop files here to upload" instruction.

At the bottom of the form, there is a black box with the number "32" and a blue "Next" button.

30- Click on **View Workflow** to review the workflow.

31- Optional to add addition CC e-mails and/or additional comments. DO NOT add attachments as they only stay with the e-mail notification.

32- After review, click on the **Next** button.

33- The draft e-mail will pop up. Click on the **Submit** button.

34- Process Complete.