

PMWeb[®] Training

Introduction and Setup

PMWeb Home Page

- <https://wustl.pmweb.com/pmweb>



PMWeb® Washington University in St. Louis

User Login

PMWeb Version: 4.6.28
Database Version: 4.6.28
Client #: 1101103
Client Name: Washington University

Database: WUSTL

User: emily2

Password:

Remember Me

Login

[Technical Support](#)
[Visit PMWeb.com](#)

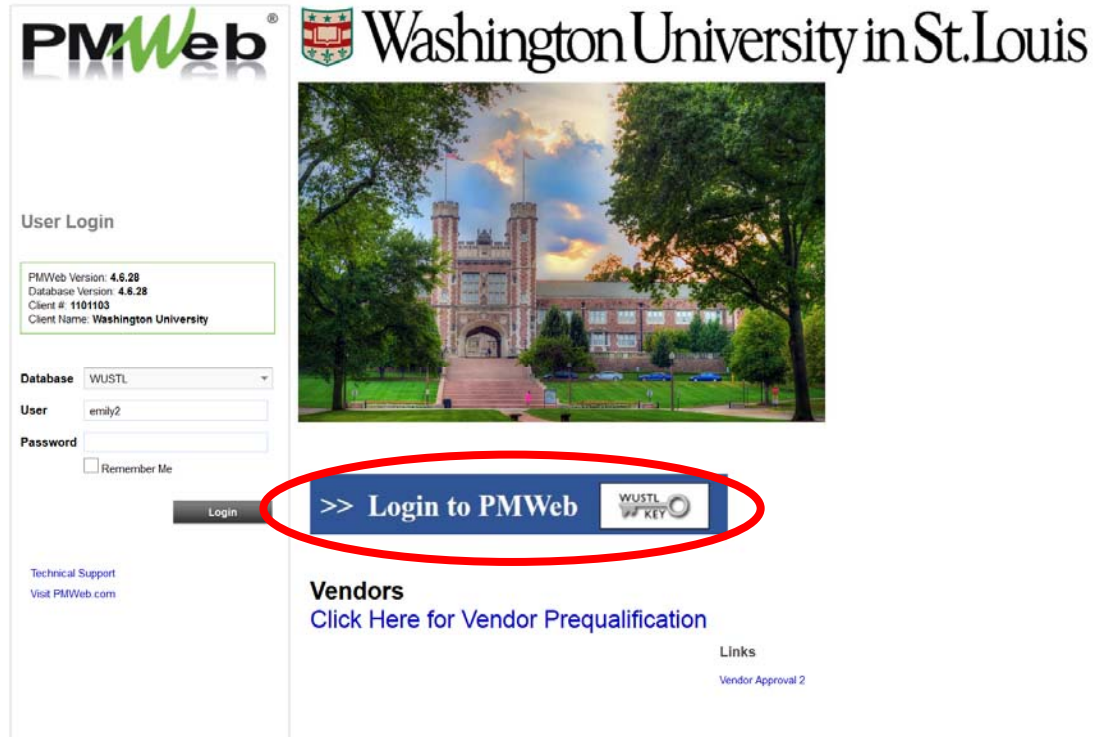
>> Login to PMWeb 

Vendors
[Click Here for Vendor Prequalification](#)

Links
[Vendor Approval 2](#)

PMWeb Home Page

- You will log in with your WUSTL Key



PMWeb® Washington University in St. Louis

User Login

PMWeb Version: 4.6.28
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User: emily2

Password:

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>> Login to PMWeb WUSTL KEY

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Click Here for Vendor Prequalification

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PMWeb Information Page

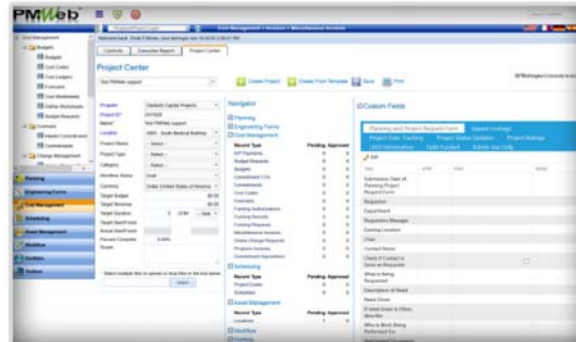
pmweb.wustl.edu



PMWeb is a comprehensive web-based portfolio, program and project management solution utilized by Washington University Facilities.

[Login to PMWeb](#) >

Request Support
pmwebhelp@wustl.edu
314-935-5707




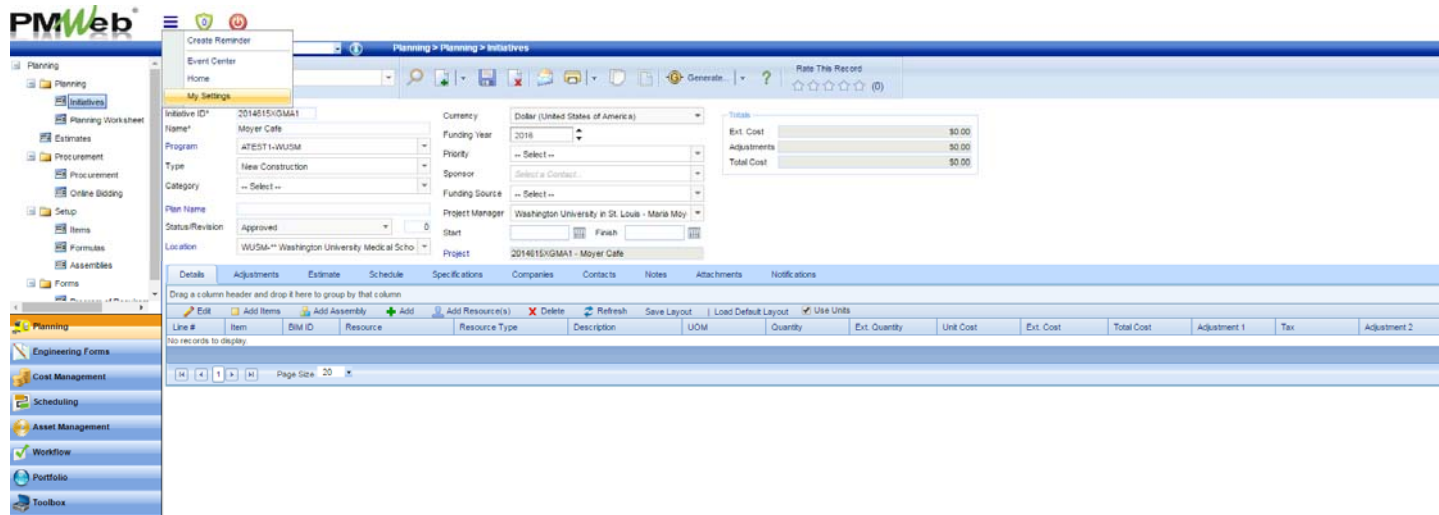
Set Up Your Home Page

- You can customize your PMWeb home page
- Create tabs for quick navigation

The screenshot displays the PMWeb user interface. At the top left is the PMWeb logo. Below it is a navigation bar with a dropdown menu set to '- Program/Project Login -'. A red circle highlights a row of navigation tabs: 'Controls', 'Executive Report', 'Over/Under Budget', 'Another report!', 'Dashboard', 'Project Center', 'Portfolio View', and 'Calendar'. Below the tabs are several content panels: 'RSS Feed' with 'Your Daily Mini Crossword', 'Links' with a 'PMWeb' link, and 'Weather' with a message 'Weather feed is not available. Please check your internet connection.' On the right side, there is a 'Work Item' section with a table showing a record for 'Commitments - 0036' with a project location of 'EMILY Testing v'. The left sidebar shows a tree view of the application structure, including folders for Planning, Procurement, Setup, and Forms, with sub-items like Initiatives, Planning Worksheet, Estimates, Procurement, Online Bidding, Items, Formulas, Assemblies, and Forms. At the bottom left, there is a small window titled 'Planning' and another titled 'Engineering Forms'. The date '6/20/1' is visible in the bottom left corner.

Set Up Your Home Page

- Customize your PMWeb home page
- Select  icon and “My Settings”



Set Up Your Home Page

- Ensure that the project center is enabled
 - Check “Show > Project Center”

The screenshot displays the PMWeb user interface. A blue arrow points to the 'Project Center' checkbox in the 'Home Page Tabs' table, which is currently checked. The interface includes a navigation sidebar on the left, a main content area with various configuration panels, and a search bar at the top right.

Show	Order	Tab Label	Tab Type	PMWeb Report	SQL Report
<input checked="" type="checkbox"/>	001	Controls	System		
<input checked="" type="checkbox"/>	002	Dashboard	Report		
<input checked="" type="checkbox"/>	003	Project Center	System		
<input checked="" type="checkbox"/>	004	Portfolio View	System		
<input checked="" type="checkbox"/>	005	Map View	System		
<input checked="" type="checkbox"/>	006	Calendar	System		
<input checked="" type="checkbox"/>	007	Report 2	Report		

Show	Control	Content
<input checked="" type="checkbox"/>	News	
<input checked="" type="checkbox"/>	Links	
<input checked="" type="checkbox"/>	Weather	
<input checked="" type="checkbox"/>	My Assignments	
<input checked="" type="checkbox"/>	Notifications	
<input checked="" type="checkbox"/>	Workflow Inbox	

Configure Project Center
<input checked="" type="checkbox"/> Navigator
<input checked="" type="checkbox"/> RECORD NAVIGATOR
<input checked="" type="checkbox"/> PLANNING
<input checked="" type="checkbox"/> Estimates
<input checked="" type="checkbox"/> Initiatives
<input checked="" type="checkbox"/> Online Bidding
<input checked="" type="checkbox"/> Pre-bid
<input checked="" type="checkbox"/> Procurement
<input checked="" type="checkbox"/> Program of Requirements (PMOR)
<input checked="" type="checkbox"/> ENGINEERING FORMS
<input checked="" type="checkbox"/> Action Items
<input checked="" type="checkbox"/> Correspondence

Set Up Your Home Page

- Configure project center
 - Check/Uncheck modules/items you do/do not want to see in the project center

The screenshot displays the PMWeb application interface. The main content area features a 'Home Page Tabs' table with the following data:

Show	Order	Tab Label	Tab Type	PMWeb Report	SQL Report
<input checked="" type="checkbox"/>	001	Controls	System		
<input checked="" type="checkbox"/>	002	Dashboard	Report		
<input checked="" type="checkbox"/>	003	Project Center	System		
<input checked="" type="checkbox"/>	004	Portfolio View	System		
<input checked="" type="checkbox"/>	005	Map View	System		
<input checked="" type="checkbox"/>	006	Calendar	System		
<input checked="" type="checkbox"/>	007	Report 2	Report		

The 'Configure Project Center' panel on the right shows a list of modules with checkboxes, including 'NAVIGATOR', 'PLANNING NAVIGATOR', 'PLANNING', 'Estimates', 'Initiatives', 'Online Bidding', 'Pre-bid', 'Procurement', 'Program of Requirements (PMPOR)', 'ENGINEERING FORMS', 'Action Items', and 'Correspondence'. A blue arrow points to this panel with the text 'Configure Project Center'.

Set Up Your Home Page

- View Project Center
 - Select Project Center Tab

The screenshot shows the PMWeb software interface. The top navigation bar includes tabs for 'Controls', 'Executive Report', 'Another report!', and 'Project Center'. A blue arrow points to the 'Project Center' tab. The main content area is titled 'Project Center' and displays project details for 'ATEST1-DAN'. The details include fields for Program, Project ID, Name, Location, Project Status, Project Type, Category, Workflow Status, Currency, Target Budget, Target Revenue, Target Duration, Target Start/Finish, Actual Start/Finish, Percent Complete, and Scope. A 'Navigator' section on the right lists various project types and their status (Pending/Approved). Below the navigator is a table with columns for 'Project Date Tracking', 'Project Status Updates', and 'Project Ratings'. The table has rows for 'LEED Information', 'Debt Funded', and 'Admin Use Only'. The bottom of the interface shows a 'Requestor' field and a 'Department' field.

Record Type	Pending	Approved
Estimates	1	0
Initiatives	0	0
Online Bidding	0	0
Procurement	0	0
Program of Requirements (PMPOR)	0	0

Project Date Tracking	Project Status Updates	Project Ratings
LEED Information	Debt Funded	Admin Use Only

Requestor	Department	Requesters Manager

Set Up Your Home Page

- Add a report to a tab on your home page
 - Home Page Tabs > “Add”

The screenshot shows the PMWeb application interface. The main content area displays the 'Home Page Tabs' configuration screen. A blue arrow points to the 'Add' button in the 'Home Page Tabs' table. The table has columns for 'Show', 'Order', 'Tab Label', 'Tab Type', 'PMWeb Report', and 'SQL Report'. The 'Configure Controls Tab' panel is also visible, showing a list of controls and their content. The 'Configure Project Center' panel is also visible, showing a list of project center items.

Show	Order	Tab Label	Tab Type	PMWeb Report	SQL Report
<input checked="" type="checkbox"/>	001	Controls	System		
<input type="checkbox"/>	002	Dashboard	Report		
<input checked="" type="checkbox"/>	003	Project Center	System		
<input checked="" type="checkbox"/>	004	Portfolio View	System		
<input checked="" type="checkbox"/>	005	Map View	System		
<input checked="" type="checkbox"/>	006	Calendar	System		
<input type="checkbox"/>	007	Report 2	Report		

Show	Control	Content
<input checked="" type="checkbox"/>	News	
<input checked="" type="checkbox"/>	Links	
<input checked="" type="checkbox"/>	Weather	
<input checked="" type="checkbox"/>	Events	
<input checked="" type="checkbox"/>	My Assignments	
<input checked="" type="checkbox"/>	Notifications	
<input checked="" type="checkbox"/>	Workflow Inbox	

Show	Item
<input checked="" type="checkbox"/>	Navigator
<input checked="" type="checkbox"/>	*RECORD NAVIGATOR
<input checked="" type="checkbox"/>	PLANNING
<input checked="" type="checkbox"/>	Estimates
<input checked="" type="checkbox"/>	Initiatives
<input checked="" type="checkbox"/>	Online Bidding
<input checked="" type="checkbox"/>	Pre-bid
<input checked="" type="checkbox"/>	Procurement
<input checked="" type="checkbox"/>	Program of Requirements (PMPOR)
<input checked="" type="checkbox"/>	ENGINEERING FORMS
<input checked="" type="checkbox"/>	Action Items
<input checked="" type="checkbox"/>	Correspondence

Set Up Your Home Page

- Enter a custom tab label

The screenshot shows the PMWeb application interface. The main content area is titled "Home Page Tabs" and contains a table with the following data:

Show	Order	Tab Label*	Tab Type	PMWeb Report	SQL Report
<input checked="" type="checkbox"/>	001	Controls	System		
<input checked="" type="checkbox"/>	002	Executive Report	Report		WUSTL - Portfolio S
<input checked="" type="checkbox"/>	003	Over/Under Budget	Report		Projects Over/Under
<input checked="" type="checkbox"/>	004	Another report!	Report		Projects Excel
<input type="checkbox"/>	005	Dashboard	Report		Executive Portfolio D
<input checked="" type="checkbox"/>	006	Project Center	System		
<input type="checkbox"/>	007	Portfolio View	System		
<input type="checkbox"/>	008	Map View	System		
<input type="checkbox"/>	009	Calendar	System		
<input type="checkbox"/>	010	New Tab	Report		

A blue arrow points to the "Tab Label*" column of the table, with the text "Type label here".

The interface also includes a left sidebar with navigation options like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The top navigation bar shows "PMWeb" and "Program/Project Login".

Set Up Your Home Page

- Add a report to a tab
 - Select SQL Report folder; select report from pop up window; save and close

The screenshot displays the 'ProgramProject Login' application. On the left, a navigation pane shows various menu items like Planning, Initiatives, and Procurement. The main window is divided into several sections:

- Profile Section:** Contains user information such as Last Login (May-06-2016 2:49:50 PM), First Name (Emily), Last Name (Follman), and Email (emily.follman@wustl.edu). It also has fields for Old Password and New Password.
- Options Section:** Includes checkboxes for 'Prompt to save when navigating away from records' and 'Open with menu collapsed'.
- Home Page Tabs Section:** A table with columns for Show, Order, Tab Label, Tab Type, PM/Web Report, and SQL Report. It lists various reports like 'Controls', 'Executive Report', 'Over/Under Budget', etc.
- SQL Reports Pop-up Window:** A window titled 'SQL Reports' is open, showing a list of reports. A blue arrow points to the 'Budget Multiple Projects (P)' report. The 'Report Name*' field is set to 'Budget Multiple Projects (Pend & App)'. A red circle highlights the 'Save & Close' button at the bottom right of this window.
- Refresh Section:** A table with columns for Show, Control, and Content, listing items like News, Links, Weather, Events, My Assignments, Notifications, and Workflow Inbox.
- Navigator Section:** A list of navigation items with checkboxes, including RECORD NAVIGATOR, PLANNING, Estimates, Initiatives, Online Bidding, Pre-bid, Procurement, Program of Requirements (PMPOR), and ENGINEERING FORMS.

Two blue arrows provide instructions: one points to the 'Budget Multiple Projects (P)' report in the SQL Reports window with the text 'Select a report', and another points to the 'SQL Report' column in the Home Page Tabs table with the text 'Select SQL Report Folder'.

Workflow

- Allows routing of records/documents to previously defined roles for review/approval
- Has been configured on certain modules for each campus (DAN/WUSM)
- Inherited on each project when you begin your project from a system template

Workflow

- Known roles are predefined, for example:
 - Director of Capital Projects
 - Associate Vice Chancellor
- Project Manager and Accountant roles change project to project
 - These roles will be assigned at the project level during project setup

Workflow

- Workflow is configured on the following modules:
 - Budgets (Resolution)
 - Budget Requests (Resolution Increase)
 - Commitments (Vendor Contract)
 - Commitment Change Orders (Vendor Change Order)
 - Online Change Requests (Pending Change Order)
 - Miscellaneous Invoices
 - Progress Invoices
 - Vendor Prequalification Approvals
 - Project Closeout

Workflow

- Records provide visual workflow so users can easily see workflow status

The screenshot displays a software interface with a navigation menu on the left containing 'Cost Management', 'Scheduling', 'Asset Management', 'Workflow', 'Portfolio', and 'Toolbox'. The main area is titled 'Workflow Actions' and includes a 'Save' button, a list of actions (Approve, Return, DO NOT USE, Withdraw, Final Approve, Delegate), an 'Email Preview' section with fields for Subject, Email Body, and Comments, and an 'Add CC' field. Below this is a 'Business Process' section with a 'Refresh' button and a table.

#	Type	All Must Approve?	Due Date	Role	User	Delegate	Instructions	RAM
1	✓	<input type="checkbox"/>	Apr-19-2016	-- Submitter --				
1	✓	<input checked="" type="checkbox"/>	Apr-19-2016	Accountant 1	Melissa Bayer		Instructions: For Commitments in excess of \$25,000 attach Justification and/or Bid Summary	
1	✓	<input checked="" type="checkbox"/>	Apr-19-2016	Project Manager 1	Andrew McCready		Instructions: For Commitments in excess of \$25,000 attach Justification and/or Bid Summary	
2	↘			-- APM --	Commitment > \$10k			
3	↘			-- APM --	Commitment between \$800k and \$1M			
4	↘			-- APM --	Commitment between \$2M & \$5M			
5	↘			-- APM --	Commitment >\$5M			
6	↘			-- APM --	Non PO Commitment			
6.1	✓	<input type="checkbox"/>	Apr-26-2016	Contractor (Prime)	Andrew McCready			
6.2	✓	<input type="checkbox"/>	May-01-2016	Project Manager 1	Andrew McCready			
6.3	↘			-- APM --	Commitment between \$50k & \$800			

Workflow tab in each record with workflow

Current step in workflow

Workflow

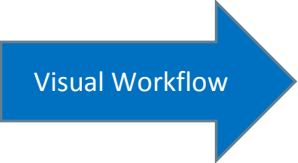
- View workflow audit trail and visual workflow



Workflow Log

Resend Message(s) Refresh

Email	Generated	Step	Due Date	Role	User	Action Date	Action Time	Action	Delegate	Team Input	Document Value	Signature	Comments
				-- Submitter --	Melissa Bayer(1353190	Apr-14-2016	12:29:29 PM	Submit					
		1	Apr-19-2016	Accountant 1	Melissa Bayer(1353190	Apr-14-2016	12:31:10 PM	Team Input		1353411315 - Ryan Lyn			By check reviewed approves workflow
		1	Apr-19-2016		Ryan Lynch(135341131	Apr-14-2016	12:33:49 PM	Review Complete					Full Com go here...
		1	Apr-19-2016	Project Manager 1	Andrew McCready(135	Apr-14-2016	12:52:34 PM	Approve					
		1	Apr-19-2016	Accountant 1	Melissa Bayer(1353190	Apr-21-2016	01:34:05 PM	Approve					
		2		-- APM --	0014002 - Commitment	Apr-21-2016	01:34:06 PM	Approve					
		3		-- APM --	00129 - Commitment bi	Apr-21-2016	01:34:06 PM	Approve					
		4		-- APM --	00135 - Commitment bi	Apr-21-2016	01:34:06 PM	Approve					
		5		-- APM --	00130 - Commitment >	Apr-21-2016	01:34:06 PM	Branch					
		5.1	Apr-26-2016	Executive Vice Chancel	Melissa Bayer(1353190	Apr-21-2016	01:46:30 PM	Approve					
		8		-- APM --	00131 - Non PO Commi	Apr-21-2016	01:46:31 PM	Branch					



Workflow and Team Input

- You can invite review/comments from resources that are not part of a predefined workflow using the team input feature
 - Note: Team input feature is not visible until record submitted into workflow

The screenshot displays a software interface for managing workflow actions. At the top, there is a navigation bar with tabs: Details, Adjustments, Specifications, Checklists, Clauses (2), Change Orders, Progress Invoices, Payments, and Notes (4). Below this is a 'Notifications' section. The main area is titled 'Workflow Actions' and contains three columns: 'Actions', 'Email Preview', and 'Comments'. The 'Actions' column lists several options with radio buttons: Approve (green checkmark), Return (orange circle), DO NOT USE (red X), Withdraw (ends workflow) (grey circle), Final Approve (green checkmark), and Delegate (person icon). A 'Submit' button is located at the bottom of this column. The 'Email Preview' column has fields for 'Subject' and 'Email Body'. The 'Comments' column is currently empty. At the bottom of the interface, there is an 'Add CC' field.

Workflow and Team Input

- Once a record has been submitted into workflow, the team input option becomes visible
 - Users with a role in workflow can request team input **only** during their step(s) of the workflow

Details Adjustments Specifications Notes Attachments Workflow (Step 1 of 5) Notifications

Workflow Actions

Actions

- Approve
- Return
- DO NOT USE
- Withdraw (ends workflow)
- Final Approve
- Delegate
- Team Input (0)**

Save

Email Preview

Subject

Email Body

Comments

Add CC

Workflow and Team Input

- Select team input hyperlink, and in the dialog box, select the user or users who you would like to review the record and/or document(s)

The screenshot displays a software interface with a 'Team Input' dialog box. In the background, the 'Workflow Actions' pane lists several actions, with 'Team Input (0)' circled in red. The 'Team Input' dialog box is open, showing a 'Step' of '2.2.1 - Commitment Vendor' and an 'Approver' of '1353539958 - Emily Follman'. The 'Request Team Input' section shows a list of users, with '1103849842 - Cassandra Benson' selected. The 'Team Progress' section shows 'No records to display.'

6/20/2

Business Process
Workflow Log

Washington University in St. Louis
INFORMATION TECHNOLOGY

Workflow and Team Input

- Add a message if necessary and set parameters
- User will receive notification that they have a record waiting for their input

Details Adjustments Spe

Team Input

Save Cancel

Step 3 - (WUSM) Associate Vice Chancellor Facilities

Approver [redacted]

Request Team Input 1103849842 - Cassandra Bens

Can Edit Record

Can Edit Notes

Can Edit Attachments

Message

Team Progress

Team Member

No records to display.

Workflow Actions

Actions

- Approve
- Return
- DO NOT USE
- Withdraw (ends workflow)
- Final Approve
- Delegate

Team Input (0)

Save

Business Process



Workflow and Team Input

- When team input user logs into PMWeb, they are able to add comments and/or select review complete.
 - Once the requester approves their step of the workflow, the team input user is no longer able to comment

The screenshot displays the 'Workflow Actions' interface. On the left, under 'Actions', there are two radio buttons: 'Review Complete' (unselected) and 'Comment' (selected). A 'Save' button is located at the bottom left. The 'Email Preview' section on the right contains fields for 'Subject' and 'Email Body', and a 'Comments' area with the text 'This is comment 3'. An 'Add CC' field is visible at the bottom.

Workflow and Team Input

- Team input user name and comments are captured as part of the workflow audit trail log

Email	Generated	Step	Due Date	Role	User	Action Date	Action Time	Action	Delegate	Team Input	Document Value	Signature	Comments
✉				-- Submitter --	Ryan Lynch(13534113)	Apr-27-2016	11:24:43 AM	Submit					
✉		1	May-02-2016	Customer Input Collect	Ryan Lynch(13534113)	Apr-27-2016	11:31:00 AM	Team Input		1353203768 - Andrew			Please approve this ...
✉		1	May-02-2016		Maria Moyer(13535430)	Apr-27-2016	11:32:20 AM	Review Complete					Ryan, this looks great. You have a nice shirt on today.
		1	May-02-2016		Andrew McCready(13535430)	Apr-27-2016	11:33:02 AM	Comment					this and not going to work for A ...
✉		1	May-02-2016		Andrew McCready(13535430)	Apr-27-2016	11:35:00 AM	Review Complete					
✉		1	May-02-2016	Customer Input Collect	Ryan Lynch(13534113)	Apr-27-2016	11:39:04 AM	Approve					

Document Manager – File Storage

- Navigate to Toolbox > Document Manager

The screenshot displays the PMWeb Document Manager interface. On the left, a 'Toolbox' sidebar contains various tools, with 'Document Manager' highlighted. A blue arrow points from the text 'Document Manager' to this sidebar. The main area shows a tree view of a project structure, with '2 Resolutions (1)' selected. Below the tree, a table lists documents. A blue arrow points from the text 'Toolbox' to the bottom of the sidebar.

Document #	Description	File Name	Size	Ext.	Type	Category	Workflow Status	Ad
93	Olin Resolution 1	Olin_Resolution_1.pdf	23.18 KB	pdf			Draft	Me

Folder: /Olin 2fl Janice new office/A Project Financial Information_Bidding & Procurement/2 Resolutions/

Quick File Upload

Browse to select files or drop files in the box below to upload them.

Select

Document Manager

- View any files that have been added to the project

The screenshot displays the PMWeb Document Manager interface. On the left is a navigation sidebar with a 'Toolbox' menu containing items like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main area shows a project tree for 'Project: Olin 2fl Janice new office'. Under 'A Project Financial Information', there is a folder '2 Resolutions (1)' containing a file 'Olin Resolution 1.pdf'. The file list table below shows the following data:

Document #	Description	File Name	Size	Ext.	Type	Category	Workflow Status	Ad
93	Olin Resolution 1	Olin Resolution 1.pdf	23.18 KB	pdf			Draft	Me

Below the table is a 'Quick File Upload' section with a 'Browse to select files or drop files in the box below to upload them.' button and a 'Select' input field.

Document Manager – Add Files

- Two ways to add files to PMWeb
- Select project; select appropriate folder for the files
 - Upload file(s)

The screenshot shows the PMWeb Document Manager interface. The top navigation bar includes the PMWeb logo, a menu icon, and a dropdown menu currently set to "Emily 2 test vendor security". A blue arrow labeled "Select project" points to this dropdown. On the left, a sidebar contains a "Toolbox" with various icons and a "Planning" section with sub-items like "Engineering Forms", "Cost Management", "Scheduling", and "Asset Management". A blue arrow labeled "Select folder" points to the "2 Resolutions (2)" folder in the main project tree. The main content area displays a table of documents with columns for Document #, Description, File Name, Size, Ext., and Category. Two rows are visible: one for "Olin Resolution 1" (23.18 KB pdf) and one for "Second Resolution" (28.17 KB pdf). A blue arrow labeled "Uploaded files added here" points to the table. Below the table, a "Folder:" path is shown, and a "Quick File Upload" section includes a "Browse to select files or drop files in the box below" area with a "Select" button. A blue arrow labeled "Upload file or multiple files" points to this area.

Document #	Description	File Name	Size	Ext.	Category
111	Olin Resolution 1	Olin_Resolution_1.pdf	23.18 KB	pdf	
112	Second Resolution	Second_Resolution.pdf	28.17 KB	pdf	

Add Files to a Record

- Two ways to add files to PMWeb
- Add to project record > attachments tab

The screenshot displays the PMWeb interface. On the left, a navigation pane shows a tree view with 'Budget Requests' selected under 'Cost Management'. A blue arrow points from the text 'Navigate to module' to this selection. The main content area shows a record for '001 - Emily 2 test vendor security'. Below the record details, there are tabs for 'Details', 'Adjustments', 'Specifications', 'Notes', and 'Attachments'. A blue arrow points from the text 'Attachments tab' to the 'Attachments' tab. Below the tabs, there are buttons for 'Edit', '+ Add', '+ Document Manager', 'Link PMWeb Record(s)', and 'Download Files'. A table with columns 'Description*' and 'Revision/Version' is visible, showing 'No records to display.' At the bottom, there is a 'Quick File Upload' section with a text input field and a 'Select' button. A blue arrow points from the text 'Upload file or multiple files' to this section.

Add Files to a Record

- Select files; select open and files will be added to record

The screenshot displays the PMWeb application interface. The main window shows a record for 'Emily 2 test vendor security' with details such as Record # 001, Type Full Resolution Wo, and Workflow Status Draft. A 'File Upload' dialog box is open, showing a file explorer view of the 'Resolutions' folder. Two files, 'Olin Resolution 1' and 'Second Resolution', are selected. A blue arrow points to the selected files with the text 'Select files'. Another blue arrow points to the 'Open' button in the dialog box with the text 'Open'. Below the dialog box, there is a 'Quick File Upload' section with a text input field and a 'Select' button.

Add Files to a Record

- Once added, files will appear in the attachments tab of the record. Save the record.

The screenshot displays the PMWeb application interface. The top navigation bar shows the breadcrumb path: Cost Management > Budgets > Budget Requests. The main content area is titled '001 - Emily 2 test vendor security -'. A red circle highlights the 'Add' icon (a green plus sign) in the toolbar. Below the toolbar, the record details form is visible, including fields for Project*, Record #*, Type*, Description, Estimate, Workflow Status, Revision, Date, and Post As*. The 'Attachments' tab is selected, showing a table with columns for Description*, File*, and Revis. Two files are listed: 'Olin Resolution 1' with file 'Olin Resolution 1.pdf' and 'Second Resolution' with file 'Second Resolution.pdf'. A large blue arrow points from the right towards the table, with the text 'Files added' written inside it. The bottom of the screen shows a footer with the date '6/20/2016', a 'Page Size' of '20', and the Washington University in St. Louis logo.

Description*	File*	Revis
Olin Resolution 1	Olin Resolution 1.pdf	
Second Resolution	Second Resolution.pdf	

Add Files from Document Manager to Record

- Files from document manager can also be added to any record
 - In record attachments tab, select document manager

The screenshot shows the PMWeb interface for a record titled 'Emily 2 test vendor security'. The left sidebar shows a navigation tree with 'Budget Requests' selected. The main area displays record details for '001 - Emily 2 test vendor security'. Below the details, there are tabs for 'Details', 'Adjustments', and 'Specifications'. The 'Specifications' tab is active, showing a table with columns for 'Description*' and 'Revision/Version'. A blue arrow points to the '+ Document Manager' button in the table's header. Another blue arrow points to the 'Budget Requests' menu item in the sidebar. At the bottom, there is a 'Quick File Upload' section with a text box and a 'Select' button.

Navigate to module

Select document manager

Add Files from Document Manager to Record

- Navigate to appropriate folder, select files, save and exit

The screenshot shows the PMWeb interface with the 'Files Lookup' dialog box open. The dialog has a 'Project: Emily 2 test vendor security' dropdown and a 'Search file contents' checkbox. Below the search bar is a file tree showing the following structure:

- Project: Emily 2 test vendor sec
 - A Project Financial Informal
 - 1 Budgets

The file list below the tree shows the following files:

File Name	Size	Status
Olin Resolution 1.pdf	23.18 KB	Draft
Second Resolution.pdf	28.17 KB	Draft

The dialog also includes buttons for 'Upload File', 'Save', and 'Save & Exit'. A blue arrow points to the '1 Budgets' folder in the file tree, and another blue arrow points to the 'Save & Exit' button.

Add Files from Document Manager to Record

- Files added to record; note that files added from document manager are available in both places
- Attachments tab shows file count (2)

The screenshot displays the PMWeb interface for a record titled "Emily 2 test vendor security". The "Attachments (2)" tab is active, showing a table with two entries:

Description*	Files	Revision/Version	Type
Olin Resolution 1	Olin Resolution 1.pdf	↓	Document Manager
Second Resolution	Second Resolution.pdf	↓	Document Manager

Two blue arrows are overlaid on the image: one points to the "Attachments (2)" tab label, and another points to the "File type – document manager" text in the table's "Type" column.

BI Reporting

- Run and view reports in PMWeb from BI Reporting
 - Portfolio module > BI Reporting sub-category

The screenshot displays the PMWeb interface. The top navigation bar shows the user 'Emily 2 test vendor security' and the current path 'Portfolio > BI Reporting'. The left sidebar contains a tree view of the 'Portfolio' module, with 'BI Reporting' highlighted. A blue arrow labeled 'BI Reporting' points to this item. Below the sidebar, a secondary menu is visible with 'Portfolio' highlighted. A blue arrow labeled 'Portfolio module' points to this menu. The main content area, titled 'Report manager', shows a tree view of report categories including 'SQL Report', 'Asset Management', 'Cost Management', 'Engineering Forms', 'Planning', 'Portfolio', 'Scheduling', 'Time Tracking', 'Toolbox', 'Workflow', and 'WUSTL Custom Reports'.

BI Reporting

- Reports organized and affiliated by module
- Select report and “Preview”

The screenshot displays the PMWeb application interface. On the left, a navigation pane shows various modules, with 'Workflow' selected. The main area is titled 'Report manager' and shows a tree view of reports under 'SQL Report'. The 'Budget Multiple Projects (Pend & App)' report is selected. To the right, a 'General' tab is active, showing report details: Report Name, Folder Path, Server URL, Report Type (SQL Report), Is System (checked), and Path. Below this is a 'Preview' button, which is highlighted by a blue arrow pointing to it from the right. Another blue arrow points to the 'Workflow' module in the left navigation pane.

PMWeb

Portfolio > BI Reporting

Report manager

General Printing Setup

Report Name* Budget Multiple Projects (Pend & App) Report Type SQL Report

Folder Path SQL Report\Cost Management\Reports\ Is System

Server URL* http://localhost/ReportServer Path* /WashUDData\PMWebReports\Cost Manager

Projects

* DO NOT DELETE* CSRB 5fl
Anesthesiology Dr Moron-CJ
** Danforth Project Lifecycle
testing templa
~** Danforth Project Lifecycle
testing templa(1)
~** Danforth Project Lifecycle
testing templa(2)
~** Danforth Project Lifecycle

Preview

Preview

Select report

BI Reporting

- Report opens in pop-up window
 - Change report parameters/filters
 - View Report – generates report per parameters/filters

Filters

Filters

View report

View Report

Budget Multiple Projects (Pend & App)

Project	A Original Budget	B Budget Changes	C=A+B Anticipated Budget	D Original Commitments	E Approved Changes	F Pending Changes	G Forecast to Complete	H=D+E+F+G Anticipated Cost	I=C-H Variance	J Actual Cost
ATEST1-DAN										
DO NOT DELETE Green Hall 2	\$1,394,836	\$0	\$1,394,836	\$1,045,600	\$0	\$0	\$0	\$1,045,600	\$349,236	\$154,299
Brown School of Social Work	\$62,100,000	\$0	\$62,100,000	\$0	\$0	\$0	\$0	\$0	\$62,100,000	\$15,427
Connie Test1 *DO NOT DELETE*	\$140,000	\$0	\$140,000	\$140,000	\$0	\$0	\$0	\$140,000	\$0	\$50,400
Crow Hall 104 Lab Renovation	\$558,198	\$0	\$558,198	\$0	\$0	\$0	\$0	\$0	\$558,198	\$0
Crow Hall 104 Lab Renovation	\$558,198	\$0	\$558,198	\$0	\$0	\$0	\$0	\$0	\$558,198	\$0
Crow Hall 104 Lab Renovation	\$558,198	\$0	\$558,198	\$0	\$0	\$0	\$0	\$0	\$558,198	\$0

BI Reporting

- Report can be viewed in PMWeb
- Report can be saved in multiple formats

Report Viewer - Mozilla Firefox

https://wustldev.pmweb.com/PMWeb/ReportPreview.aspx

Report title: Budget Multiple Projects (Pend & App) Program: -- All --

Project(s): * DO NOT DELETE* CSRB 5fl A Language: English

Group By: Program

View Report

Save as....file type

- XML file with report data
- CSV (comma delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word

Project	A Original Budget	B Budget Changes	C=A+B Anticipated Cost	D Approved changes	F Pending Changes	G Forecast to Complete	H=D+E+F+G Anticipated Cost	I=C-H Variance	J Actual Cost
ATEST1-DAN									
DO NOT DELETE Green Hall 2	\$1,394,836	\$0	\$1,394,836	\$0	\$0	\$0	\$1,045,600	\$349,236	\$154,299
Brown School of Social Work	\$62,100,000	\$0	\$62,100,000	\$0	\$0	\$0	\$0	\$62,100,000	\$15,427
Connie Test1 *DO NOT DELETE*	\$140,000	\$0	\$140,000	\$0	\$0	\$0	\$140,000	\$0	\$50,400
Crow Hall 104 Lab Renovation	\$558,198	\$0	\$558,198	\$0	\$0	\$0	\$0	\$558,198	\$0

Washington University in St. Louis

Budget Multiple Projects (Pend & App)

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INFORMATION TECHNOLOGY

Hide/Show Columns

- To hide columns, Right Click on a column, go to the “Columns” value and view all of the columns that are present. Uncheck any column that you do not want displayed; Save Layout

The screenshot displays a software interface with a sidebar on the left containing navigation options: Master Commitments, Commitments, Change Management, Online Change Request, Commitment COs, Funding, Funding Records, Funding Requests, Funding Authorization, Invoices, Miscellaneous Invoice, and Progress Invoices. The main area is divided into several sections: Project details (Project: Moyer Cafe, Commitment: 002 - ALBERICI CONSTRUCTORS INC, Description: test, Sequence #: 1, Record #: 250, Revision: 0, Date: May-23-2016, Workflow Status: Draft, Cost Period: FY16 Apr, Category: CA (Computer Assisted In)), Online Invoice details (Invoice Date: May-01-2016, Billing Terms: 30, Invoice Due: May-31-2016, Invoice Type: Progress), and a Contract Snapshot table.

Contract Snapshot	
Original Value	\$15,000.00
Approved Changes	\$0.00
Revised Value	\$15,000.00
Invoiced	\$0.00
Retained	\$0.00
Earned Less Retainage	\$0.00
Less Prior Invoices	\$0.00
Current Payment Due	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00
Bal. To Finish (incl. Retainage)	\$15,000.00

The main table below has a context menu open over the 'Description' column. The menu options are: Edit, Delete, Refresh, Save Layout, Load Default Layout, Expand/Collapse, Link Change Orders, Production, Use Units, Sort Ascending, Sort Descending, Clear Sorting, and Columns. The 'Columns' sub-menu is open, showing a list of columns with checkboxes: Line # (checked), Cost Code (checked), and Description (checked). The 'Save Layout' button and the 'Columns' menu are circled in red.

Line #	Cost Code	Description	SubContract	Direct Pay?	Scheduled Value	CCO #	Prior Invoices	Current Invoice	Current Stored Material	Total Stored Material	Total This Invoice	Total Invoice
	0.00	Concrete			\$10,000.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	0.00				0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	0.00				0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Column Reorder

- To reorder columns, hover over the column that needs to be moved until you see a four way arrow icon and a small popup box that says, "Drag to group or reorder."

Project* Moyer Cafe
Commitment* 002 -
Company ALBERICI CONSTRUCTORS INC
Description* PC#
Payment Explanation test
Sequence # 1
Record #* 250
Revision 0 Date May-23-2016
Workflow Status Draft
Cost Period* FY16 Apr
Category* CA (Computer Assisted Ir
Paid In Full

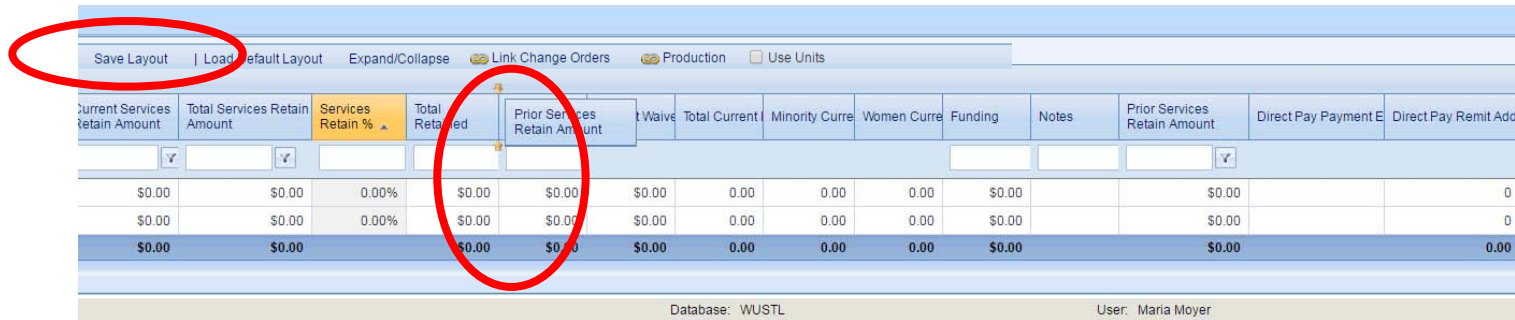
Online Invoice
Invoice Date* May-01-2016
Billing Terms* 30
Invoice Due* May-31-2016
Invoice Type* Progress
Contact
Comment
Print Lien Waiver
 Signed and Notarized Lien Waiver attached

Contract Snapshot
Original Value \$15,000.00
Approved Changes \$0.00
Revised Value \$15,000.00
Invoiced \$0.00
Retained \$0.00
Earned Less Retainage \$0.00
Less Prior Invoices \$0.00
Current Payment Due \$0.00
Unapplied Payments Available \$0.00
Payments Applied \$0.00
Open Balance \$0.00
Bal. To Finish(Incl. Retainage) \$15,000.00

Details Adjustments Specifications Checklists Payments Notes Attachments Notifications
Drag a column header and drop it here to group by that column
Edit Delete Refresh Save Layout Load Default Layout Expand/Collapse Link Change Orders Production Use Units
Line # Cost Code Description SubContract Direct Pay? Scheduled Value CCO # Prior Invoices Current Invoice Total Invoiced % Complete Balance to Invoice Current Retain A
001 01-003-003 00 00 003 00 00 Concrete \$10,000.00 \$0.00 \$0.00 \$0.00 0.00% \$10,000.00
002 01-005-005 00 00 005 00 00 Metals \$5,000.00 \$0.00 \$0.00 \$0.00 0.00% \$5,000.00
\$15,000.00 \$0.00 \$0.00 \$0.00 \$15,000.00

Column Reorder

- Click and drag the column to the area where you want to drop that column. Two yellow arrows will display to direct you to where to drop the column
- Save Layout



Current Services Retain Amount	Total Services Retain Amount	Services Retain %	Total Retained	Prior Services Retain Amount	Waive	Total Current	Minority Curre	Women Curre	Funding	Notes	Prior Services Retain Amount	Direct Pay Payment E	Direct Pay Remit Add
\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00		\$0.00		0
\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00		\$0.00		0
\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00		\$0.00		0.00

Database: WUSTL User: Maria Moyer

The logo for PMWeb, featuring the letters 'PM' in black, a green stylized 'W' that overlaps 'PM' and 'eb', and 'eb' in black. A registered trademark symbol (®) is located to the upper right of the 'b'.

PMWeb[®] Training

Procurement and Online Bidding

Procurement

- Two ways to navigate to Procurement module
 - Planning > Procurement Records sub-category

The screenshot displays the PMWeb application interface. On the left is a navigation tree with categories like Planning, Initiatives, Estimates, Procurement, Setup, Items, Formulas, Assemblies, Forms, and Program of Business. A blue arrow labeled 'Procurement' points to the 'Procurement' sub-item under the 'Planning' category. Another blue arrow labeled 'Planning' points to the 'Planning' category itself. The main window shows a breadcrumb trail: 'Planning > Procurement > Procurement'. Below this is a table with columns: Program, Project Name, Project #, Record #, Description, Workflow Status, and Bid Category. The table contains 20 rows of data. At the bottom, there are navigation controls including page numbers (1-6) and a page size of 20.

Program	Project Name	Project #	Record #	Description	Workflow Status	Bid Category
Portfolio	Taylor Avenue Sewer Repai	14029	000001	Backhoes onward	Approved	
Portfolio	The Lofts Phase II - Plannin	20160028	014029	Test of Bidding	Draft	
Portfolio	Taylor Avenue Sewer Repai	14029	000002	GCP002	Approved	Construction
Portfolio	Golf Trip Planning	2014615XGLO	000001	Golf Trip Planning Construc	Approved	Construction
Portfolio	Golf Trip Planning	2014615XGLO	000002	Engineering Bids	Approved	Design
Portfolio	14098 Barnard Hospital 5th	2014615XGLW	000001	14098	Approved	Construction
Portfolio	Golf Trip Planning	2014615XGLO	000003	Architectural Fees	Approved	Design
Portfolio	The Lofts Phase II - Plannin	20160028	014030	GCP002	Approved	Construction
Portfolio	The Lofts Phase II - Plannin	20160028	014031	GCP003	Approved	Construction
Portfolio	Bidder Test Project	20160055	000001	This is the	Approved	Construction
Portfolio	The Lofts Phase II - Plannin	20160028	014032		Draft	
ATEST1-DAN	Julie's procurement test proj	2011922	000001	Test of bid item UDFs	Approved	
Portfolio	The Lofts Phase II - Plannin	20160028	014033	GCP050216	Approved	Construction
Portfolio	RJL Main Test Project (Base	2015605	000001	Testing Testing	Draft	Construction
ATEST1-WUSM	CommitmentTest	20160060	000001	Get some Bid data	Approved	Design
ATEST1-WUSM	CommitmentTest	20160060	000002	This is a real test	Approved	Other
Portfolio	CommitmentTest	20160060	000003	How much will this cost.	Approved	Construction
Portfolio	Taylor Avenue Sewer Repai	14029	000003	GCP051116	Approved	Construction
WORKFLOW	Bid-WF-Test	2011941	000001	First Test of Workflow on O	Approved	Construction
Portfolio	Bid-WF-Test	2011941	000002	Test Bidding Activity.	Approved	Construction

Add Procurement

- Two ways to navigate to Procurement module
 - Project Center > Select Procurement hyperlink

The screenshot shows the PMWeb Project Center interface. The left sidebar contains a navigation tree with 'Procurement' highlighted. The main content area shows the 'Project Center' for 'Green Hall Phase 1 Fit Out'. A 'Navigator' table is visible, with the 'Procurement' row circled in red. The table has columns for 'Record Type', 'Pending', and 'Approved'.

Record Type	Pending	Approved
Estimates	0	1
Initiatives	0	0
Online Bidding	0	5
Procurement	13	2
Continuing Contract	0	0
Program of Requirements (PMPOR)	0	0
Test	0	0

Procurement

- Add a new procurement record or select your project from the board

PMWeb

- Program/Project Login -

Planning > Procurement > Procurement

Drag a column header and drop it here to group by that column

Programs *All* Projects *All*

+ Add X Delete Refresh Layouts

Program	Project Name	Project #	Record #	Description	Workflow Status	Bid Category
Portfolio	Taylor Avenue Sewer Repai	14029	000001	Backhoes onward	Approved	
Portfolio	The Lofts Phase II - Plannin	20160028	014029	Test of Bidding	Draft	
Portfolio	Taylor Avenue Sewer Repai	14029	000002	GCP002	Approved	Construction
Portfolio	Golf Trip Planning	2014615XGLO	000001	Golf Trip Planning Construc	Approved	Construction
Portfolio	Golf Trip Planning	2014615XGLO	000002	Engineering Bids	Approved	Design
Portfolio	14098 Barnard Hospital 5th	2014615XGLW	000001	14098	Approved	Construction
Portfolio	Golf Trip Planning	2014615XGLO	000003	Architectural Fees	Approved	Design
Portfolio	The Lofts Phase II - Plannin	20160028	014030	GCP002	Approved	Construction
Portfolio	The Lofts Phase II - Plannin	20160028	014031	GCP003	Approved	Construction
Portfolio	Bidder Test Project	20160055	000001	This is the	Approved	Construction
Portfolio	The Lofts Phase II - Plannin	20160028	014032		Draft	
ATEST1-DAN	Julie's procurement test proj	2011922	000001	Test of bid item UDFs	Approved	
Portfolio	The Lofts Phase II - Plannin	20160028	014033	GCP050216	Approved	Construction
Portfolio	R.J.L Main Test Project (Base	2015605	000001	Testing Testing	Draft	Construction
ATEST1-WUSM	CommitmentTest	20160060	000001	Get some Bid data	Approved	Design
ATEST1-WUSM	CommitmentTest	20160060	000002	This is a real test	Approved	Other
Portfolio	CommitmentTest	20160060	000003	How much will this cost.	Approved	Construction
Portfolio	Taylor Avenue Sewer Repai	14029	000003	GCP051116	Approved	Construction
WORKFLOW	Bid-WF-Test	2011941	000001	First Test of Workflow on O	Approved	Construction
Portfolio	Bid-WF-Test	2011941	000002	Test Bidding Activity.	Approved	Construction

Page Size 20

Procurement

- The Project Manager will create the procurement record.

The screenshot displays the PMWeb software interface. The main window shows a procurement record for '0014 - drywall'. The left sidebar contains a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main content area is divided into several sections:

- Form Fields:** Program* (DAN - Projects (Independent Resolution)), Project* (Green Hall Phase 1 Fit Out), Procurement # (0014), Description (drywall), Bid Category (-- Select --), Bidding Company (Select Company), Bidding Contact (Select a Contact), Estimate # (0), Revision (0), Date, Workflow Status (Draft), Bids Due (Jun-13-2016, Time 4:35 AM), Pre-bid (Select Pre Bid), and Commitment ID (Stipulated Sur).
- Options Panel:** A list of checkboxes for configuring the procurement, including 'This is a Sealed Bid', 'Lock Online Bids After Bids Due', 'Include Days Column in Online Bids', 'Include MWDBE % Column in Online Bids', 'Include Manufacturer Columns in Online Bids', 'Include Bid Item UDFs in Online Bids', 'Require Acknowledgements', 'Require Nondisclosure Agreement', 'Show Bid Due Countdown Clock', and 'Lock Quantity in Online Bids'.
- Bid Due Counter:** A table showing the remaining time for the bid due date.
- Table:** A table with columns for Award, Company, Invitation Status, Best Bid, NDA, Bid Rev, Bid Status, and Notes. The table currently shows 'No records to display'.

Days	Hours	Minutes	Seconds
0	0	0	0

Award	Company	Invitation Status	Best Bid	NDA	Bid Rev	Bid Status	Notes
No records to display							

Procurement

- Select the program and project the project name
- Save

The screenshot displays the PMWeb software interface for Procurement. The left sidebar shows a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main window shows the '0014 - drywall' procurement record. The 'Program*' and 'Project*' dropdowns are highlighted with red circles. The 'Program*' is set to 'DAN - Projects (Independent Resolution)' and the 'Project*' is set to 'Green Hall Phase 1 Fit Out'. Other fields include 'Description: drywall', 'Bid Category: -- Select --', 'Bidding Company: Select a Company...', 'Bidding Contact: Select a Contact...', 'Estimate #: 0', 'Revision: 0', 'Workflow Status: Draft', 'Bids Due: Jun-13-2016 4:35 AM', and 'Pre-bid: Select Pre-bid'. The 'Options' panel on the right includes checkboxes for 'This is a Sealed Bid', 'Lock Online Bids After Bids Due', 'Include Days Column in Online Bids', 'Include MWD BE % Column in Online Bids', 'Include Manufacturer Columns in Online Bids', 'Include Bid Item UDFs in Online Bids', 'Require Acknowledgements', 'Require Nondisclosure Agreement', 'Show Bid Due Countdown Clock', and 'Lock Quantity in Online Bids'. The 'Bid Due' table shows 0 days, 0 hours, 0 minutes, and 0 seconds. The bottom of the screen shows a 'Bidder Matrix' table with columns for Award, Company, Invitation Status, Best Bid, NDA, Bid Rev., Bid Status, and Notes. The table is currently empty, displaying 'No records to display.' and a page size of 20.

Procurement

Enter header details

1. **Procurement #** - this number will autopopulate
2. **Description** – enter a description here
3. **Bid Category**- select from the dropdown
4. **Bidding Company** – DO NOT make a selection here as there will be multiple
5. **Bidding Contact** - DO NOT enter anything in this field as there will be multiple
6. **Estimate #** - DO NOT enter anything in this field

The image shows two screenshots of the PMWeb Procurement form. The left screenshot shows the form with numbered callouts (1-11) pointing to various fields. The right screenshot is a zoomed-in view of the 'Bid Category' dropdown menu, which is circled in red. The dropdown menu lists the following options: Construction, Design, Other, Other2, and Other3. The 'Bid Category' field is currently set to '-- Select --'. The form also includes fields for Program*, Project*, Procurement #, Description, Bidding Company, Bidding Contact, Estimate #, Revision, Workflow Status, Bids Due, Time, Pre-bid, Commitment ID, and Type. The 'Options' section contains several checkboxes for bid configuration.

PMWeb

Program* DAN - Projects (Independent Resolution)

Project* Green Hall Phase 1 Fit Out

Procurement # 0014

Description drywall

Bid Category -- Select --

Bidding Company Select a Company

Bidding Contact Select a Contact

Estimate # 0

Revision 0 Date

Workflow Status Draft

Bids Due Jun-13-2016 Time 4:35 AM

Pre-bid Select Pre-bid

Commitment ID Type Stipulated Sur

Options

- This is a Sealed Bid
- Lock Online Bids After Bids Due
- Include Days Column in Online Bids
- Include MWDBE % Column in Online Bids
- Include Manufacturer Columns in Online Bids
- Include Bid Item UDFs in Online Bids
- Require Acknowledgements
- Require Nondisclosure Agreement
- Show Bid Due Countdown Clock
- Lock Quantity in Online Bids

7

Procurement

Enter header details

7. **Bids Due** – Enter date that bid is due
8. **Bid Time** – Enter time that bid is closing
9. **Pre-bid** – this field to remain blank
10. **Commitment ID** – this field will autopopulate
11. **Type** – Select agreement type from the dropdown

The screenshot displays the PMWeb software interface for the Procurement module. The main form is titled '0014 - drywall' and contains the following fields:

- 1. Procurement #: 0014
- 2. Description: drywall
- 3. Bid Category: -- Select --
- 4. Bidding Company: Select Company
- 5. Bidding Contact: Select a Contact
- 6. Estimate #: 0
- 7. Bids Due: Jun-13-2016
- 8. Time: 4:35:00
- 9. Pre-bid: Select Pre-bid
- 10. Commitment ID: (Autopopulated)
- 11. Type: Stipulated Sur

The 'Type' dropdown menu is expanded, showing the following options:

- Stipulated Sur
- Subcontract
- Purchase Order
- CM with GMP
- Continuing Services Project Agreement
- Consulting Services Agreement
- Owner Architect Agreement
- Owner Engineer Agreement
- Short Form Agreement
- Stipulated Sum Agreement

Procurement

Enter header details

- The options area will be greyed out, and you will not be able to make any selection here

The screenshot displays the PMWeb Procurement form. The left sidebar shows a navigation tree with 'Procurement' selected. The main form area contains the following fields:

- Program*: DAN - Projects (Independent Resolution)
- Project*: Green Hall Phase 1 Fit Out
- Procurement #: 0014
- Description: drywall
- Bid Category: -- Select --
- Bidding Company: Select Company
- Bidding Contact: Select a Contact
- Estimate #: 0
- Revision: 0
- Workflow Status: Draft
- Bids Due: Jun-13-2016
- Time: 4:35 AM
- Pre-bid: Select Pre-bid
- Commitment ID: [Empty]
- Type: Stipulated Sur

The 'Options' section is circled in red and contains the following settings:

- This is a Sealed Bid
- Lock Online Bids After Bids Due
- Include Days Column in Online Bids
- Include MWDBE % Column in Online Bids
- Include Manufacturer Columns in Online Bids
- Include Bid Item UDFs in Online Bids
- Require Acknowledgements
- Require Nondisclosure Agreement
- Show Bid Due Countdown Clock
- Lock Quantity in Online Bids

The 'Bid Due' section shows a countdown clock with the following values:

Days	Hours	Minutes	Seconds
0	0	0	0

Procurement

Add details

- Select Bidder Matrix tab
- Select “Add Bidders”

The screenshot shows the PMWeb software interface. The main window displays the 'Procurement' details for a project named '0014 - drywall'. The 'Bidder Matrix' tab is selected, and the 'Add Bidders' button is circled in red. A blue arrow points to the 'Bidder Matrix' tab. The interface includes a navigation pane on the left, a main content area with various fields and options, and a table at the bottom.

PMWeb

Program* DAN - Projects (Independent Resolution)
Project* Green Hall Phase 1 Fit Out
Procurement # 0014
Description drywall
Bid Category -- Select --
Bidding Company Select Company
Bidding Contact Select a Contact
Estimate # 0
Revision 0
Workflow Status Draft
Bids Due Jun-13-2016 Time 4:35 AM
Pre-bid Select Pre-bid
Commitment ID
Type Stipulated Su

Options

- This is a Sealed Bid
- Lock Online Bids After Bids Due
- Include Days Column in Online Bids
- Include MVD&E % Column in Online Bids
- Include Manufacturer Columns in Online Bids
- Include Bid Item UDF's in Online Bids
- Require Acknowledgements
- Require Nondisclosure Agreement
- Show Bid Due Countdown Clock
- Lock Quantity in Online Bids

Bid Due

Days	Hours	Minutes	Seconds
0	0	0	0

Bidder Matrix Bid Items Addenda Manage Bids Specifications Notes Attachments Workflow Notifications

Drag a column header and drop it here to group by that column

+ Add Bidders Refresh Delete Award Display -- All -- Save Layout | Load Default Layout

Award Invitation Status Best Bid NDA Bid Rev Bid Status Notes

No records to display

Page Size 20

Procurement

Add details

- In the pop-up window, select the companies that you are inviting to bid
- Save and close

The screenshot shows a web browser window with the title "Select Companies/Contacts (3 Selected) - Mozilla Firefox". The address bar shows the URL: <https://wustldev.pmweb.com/PMWeb/CompaniesFilterPopup.aspx?txtContact=NOTExist&txtEmail=NOTExist&Type=Companies>. The page has two tabs: "Companies/Contacts" (active) and "Distribution Lists". Below the tabs is a header area with a search bar containing "-- Select --" and buttons for "Save and Close", "Save Layout", and "Load Default Layout". The "Save and Close" button is circled in red. Below the header is a table with the following columns: "Company", "Type", "Reference", and "Project". The table contains several rows, with two rows checked (indicated by a checkmark in the first column):

	Company	Type	Reference	Project
<input type="checkbox"/>				
<input checked="" type="checkbox"/>	8760 ENGINEERING LLC	MAJ	Buyer Code: 8; Minority Code:	RJL Main Test Project
<input type="checkbox"/>	8760 ENGINEERING LLC	MAJ	Buyer Code: 8; Minority Code:	RJL Main Test Project
<input type="checkbox"/>	8760 ENGINEERING LLC	MAJ	Buyer Code: 8; Minority Code:	RJL Main Test Project
<input checked="" type="checkbox"/>	ABC Drive Co			
<input type="checkbox"/>	ABC Glass			
<input type="checkbox"/>	Crowne Plaza Hotel			

Procurement

Add details

- Select “Bid Items” Tab
- If you have an estimate, select “Add Estimate Items”
 - Select line items to include in the bid by selecting the checkbox(es)

The screenshot displays the PMWeb software interface for Procurement. The main window shows the '0014 - drywall' project details, including the program name 'DAN - Projects (Independent Resolution)', project description 'Green Hall Phase 1 Fit Out', and procurement number '0014'. The 'Bid Items' tab is active, and the 'Add Estimate Items' button is highlighted with a red circle. A red oval highlights the 'Estimate / Initiative' column header in the table. A blue arrow points to the 'Bid Items' tab.

Estimate / Initiative	Record	Line #	Item	Description	Project	Bid Category
<input checked="" type="checkbox"/>	Estimate	308 - Full Design anc 1	000069	06 00 00 Woods, Plastics, and Co	Green Hall Phase 1 Fit Out	
<input checked="" type="checkbox"/>	Estimate	308 - Full Design anc 2	000074	07 00 00 Thermal and Moisture P	Green Hall Phase 1 Fit Out	
<input checked="" type="checkbox"/>	Estimate	308 - Full Design anc 3	000149	21 00 00 Fire Suppression	Green Hall Phase 1 Fit Out	
<input checked="" type="checkbox"/>	Estimate	308 - Full Design anc 4	000154	22 00 00 Plumbing	Green Hall Phase 1 Fit Out	
<input checked="" type="checkbox"/>	Estimate	308 - Full Design anc 5	000160	23 00 00 Heating, Ventilating, anc	Green Hall Phase 1 Fit Out	
<input checked="" type="checkbox"/>	Estimate	308 - Full Design anc 6	000174	26 00 00 Electrical	Green Hall Phase 1 Fit Out	
<input checked="" type="checkbox"/>	Estimate	308 - Full Design anc 7	000228	100 10 00 Architectural Basic Ser	Green Hall Phase 1 Fit Out	
<input checked="" type="checkbox"/>	Estimate	308 - Full Design anc 8	000347	100 21 00 Design Build Services	Green Hall Phase 1 Fit Out	
<input checked="" type="checkbox"/>	Estimate	308 - Full Design anc 9	000257	100 25 50 Interior Design	Green Hall Phase 1 Fit Out	
<input checked="" type="checkbox"/>	Estimate	308 - Full Design anc 10	000452	100 25 84 Acoustical	Green Hall Phase 1 Fit Out	

Procurement

Add details

- Select “Bid Items” Tab
- If you do not have an estimate, select “Add Items”
 - Select line items to include in the bid dragging over the appropriate cost code line items
 - Save

The screenshot displays the PMWeb software interface. On the left, a navigation pane shows the 'Procurement' section expanded, with 'Bid Items' highlighted. A blue arrow points from the 'Bid Items' label to the 'Bid Items' button in the main window. In the main window, the 'Add Items' button is also highlighted with a red circle. The main window shows a form for '0014 - drywall' with various fields for project details, including 'Project*', 'Phase', 'Location', and 'Company'. Below the form, there is a table with columns for '#', 'Item', 'Description', 'Phase', 'Cost Code', 'Type', 'Quantity', and 'Unit Cost'. The table currently displays 'No records to display.' and has a 'Page Size' of 5. The 'Save' button in the top right corner of the main window is also highlighted with a red circle.

Procurement

Edit bid items on the Bid Items tab

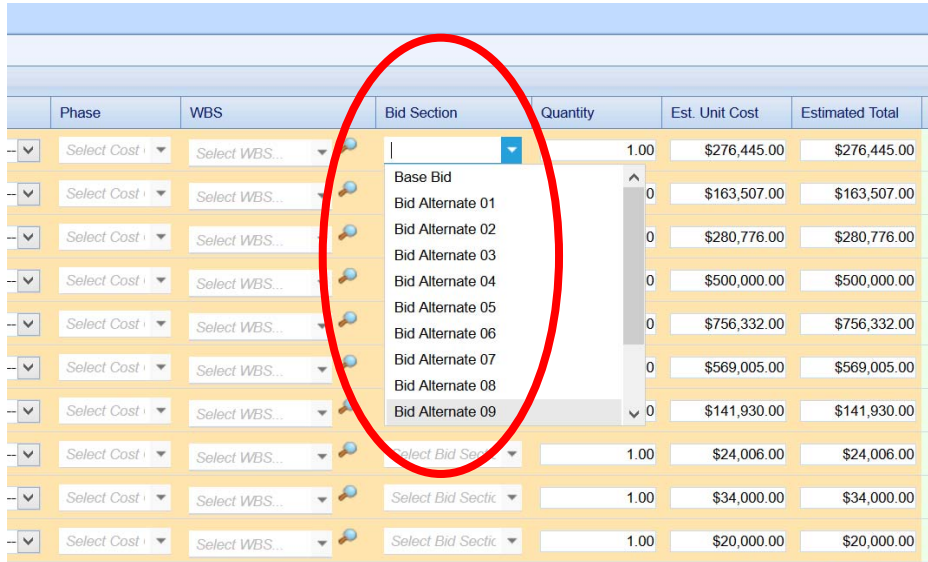
- Use shortcut: select top row; shift; bottom row; edit
- Select “Edit” to make all line items available for edit

The screenshot displays a software interface for managing procurement bids. On the left is a navigation sidebar with categories like Planning, Engineering, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main area shows the 'Bid Items' tab selected. At the top, there are filters for 'Bids Due' (Jun-13-2016) and 'Time' (4:40 AM). Below the filters is a toolbar with buttons for '+ Add', 'Add Items', 'Add Estimate Items', 'Edit' (circled in red), 'Delete', and 'Refresh'. A table lists bid items with columns for 'Include In Bid', 'Line #', 'Project', 'Item', 'Description', 'Scope Of Work', 'UOM', 'Cost Code', and 'Cost Type'. The table contains 10 rows of data for 'Green Hall Phase 1'.

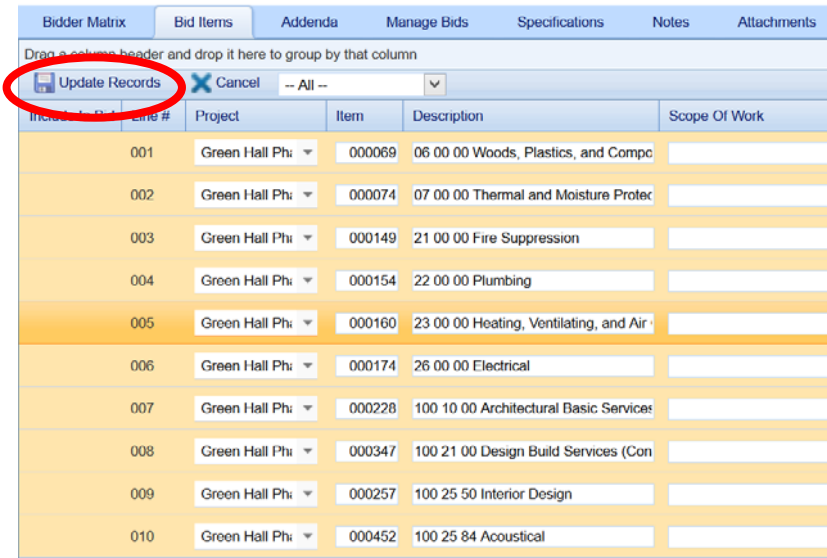
Include In Bid	Line #	Project	Item	Description	Scope Of Work	UOM	Cost Code	Cost Type
<input checked="" type="checkbox"/>	001	Green Hall Phase 1	000069	06 00 00 Woods, Plastics, and Comp			01-006-006 00 00	
<input checked="" type="checkbox"/>	002	Green Hall Phase 1	000074	07 00 00 Thermal and Moisture Protec			01-007-007 00 00	
<input checked="" type="checkbox"/>	003	Green Hall Phase 1	000149	21 00 00 Fire Suppression			01-021-021 00 00	
<input checked="" type="checkbox"/>	004	Green Hall Phase 1	000154	22 00 00 Plumbing			01-022-022 00 00	
<input checked="" type="checkbox"/>	005	Green Hall Phase 1	000160	23 00 00 Heating, Ventilating, and Air			01-023-023 00 00	
<input checked="" type="checkbox"/>	006	Green Hall Phase 1	000174	26 00 00 Electrical			01-026-026 00 00	
<input checked="" type="checkbox"/>	007	Green Hall Phase 1	000228	100 10 00 Architectural Basic Services			02-100-100 10 00	
<input checked="" type="checkbox"/>	008	Green Hall Phase 1	000347	100 21 00 Design Build Services (Con			02-100-100 21 00	
<input checked="" type="checkbox"/>	009	Green Hall Phase 1	000257	100 25 50 Interior Design			02-100-100 25 50	
<input checked="" type="checkbox"/>	010	Green Hall Phase 1	000452	100 25 84 Acoustical			02-100-100 25 84	

Procurement

- Scroll to the right to the “Bid Section” column
- Select base bid or sequentially numbered alternates; update records to save



Phase	WBS	Bid Section	Quantity	Est. Unit Cost	Estimated Total
Select Cost	Select WBS...	Base Bid	1.00	\$276,445.00	\$276,445.00
Select Cost	Select WBS...	Bid Alternate 01	0	\$163,507.00	\$163,507.00
Select Cost	Select WBS...	Bid Alternate 02	0	\$280,776.00	\$280,776.00
Select Cost	Select WBS...	Bid Alternate 03	0	\$500,000.00	\$500,000.00
Select Cost	Select WBS...	Bid Alternate 04	0	\$756,332.00	\$756,332.00
Select Cost	Select WBS...	Bid Alternate 05	0	\$569,005.00	\$569,005.00
Select Cost	Select WBS...	Bid Alternate 06	0	\$141,930.00	\$141,930.00
Select Cost	Select WBS...	Bid Alternate 07	0	\$24,006.00	\$24,006.00
Select Cost	Select WBS...	Bid Alternate 08	0	\$34,000.00	\$34,000.00
Select Cost	Select WBS...	Bid Alternate 09	0	\$20,000.00	\$20,000.00



Item #	Project	Item	Description	Scope Of Work
001	Green Hall Ph	000069	06 00 00 Woods, Plastics, and Comp	
002	Green Hall Ph	000074	07 00 00 Thermal and Moisture Protec	
003	Green Hall Ph	000149	21 00 00 Fire Suppression	
004	Green Hall Ph	000154	22 00 00 Plumbing	
005	Green Hall Ph	000160	23 00 00 Heating, Ventilating, and Air	
006	Green Hall Ph	000174	26 00 00 Electrical	
007	Green Hall Ph	000228	100 10 00 Architectural Basic Services	
008	Green Hall Ph	000347	100 21 00 Design Build Services (Con	
009	Green Hall Ph	000257	100 25 50 Interior Design	
010	Green Hall Ph	000452	100 25 84 Acoustical	

Procurement

- Select Attachments Tab
 - Add bid package documents to the procurement record
 - Use “Document Manager to add documents that have already been added to document manager. Use “Quick file upload” to add documents stored on your shared drive.

PMWeb

Planning > Procurement > Procurement

0014 - drywall

Program* DAN - Projects (Independent Resolution)

Project* Green Hall Phase 1 Fit Out

Procurement # 0014

Description drywall

Bid Category -- Select --

Bidding Company Select Company

Bidding Contact Select a Contact

Estimate # 0

Revision 0 Date

Workflow Status Draft

Bids Due Jun-13-2016 Time 4:40 AM

Pre-bid Select Pre-bid

Commitment ID Type

Options

- This is a Sealed Bid
- Lock Online Bids After Bids Due
- Include Days Column in Online Bids
- Include MWDBE % Column in Online Bids
- Include Manufacturer Columns in Online Bids
- Include Bid Item UDFs in Online Bids
- Require Acknowledgements
- Require Nondisclosure Agreement
- Show Bid Due Countdown Clock
- Lock Quantity in Online Bids

Days	Hours	Minutes
0	0	0

Attachments

Document Manager

Quick File Upload

Select multiple files to upload or drop files in the box below

Select

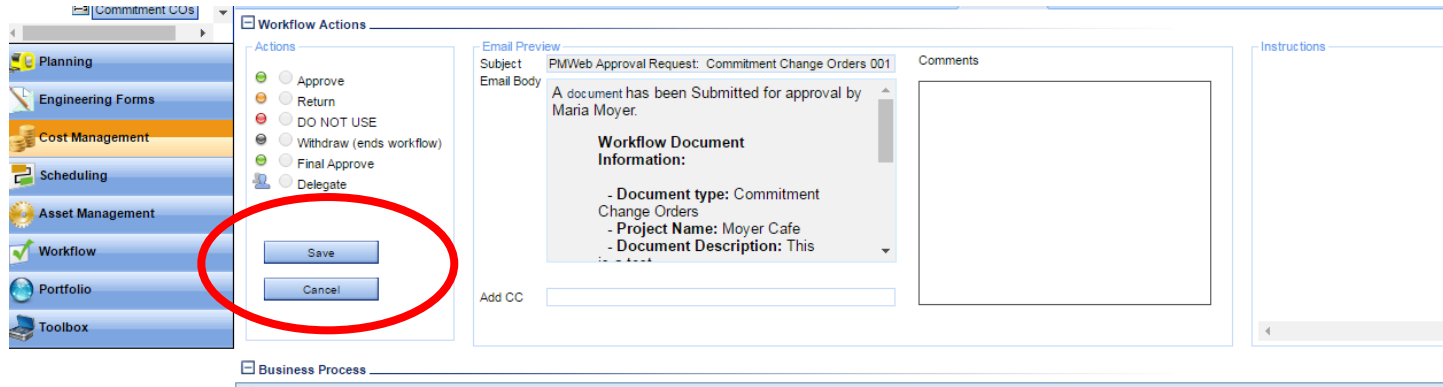
Submit Procurement into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot displays the PMWeb software interface. The left sidebar shows a navigation menu with the 'Workflow' tab selected and circled in red. The main content area shows the '006 - Another Test Part Deux' procurement record. The 'Workflow Actions' section is visible, with the 'Submit' button circled in red. A blue arrow points from the 'Workflow' tab in the sidebar to the 'Workflow' tab in the main content area. The 'Options' section on the right includes checkboxes for 'This is a Sealed Bid', 'Include Days Column in Online Bids', 'Include Bid Item UDFs in Online Bids', and 'Show Bid Due Countdown Clock'. The 'Bid Due' section shows a countdown clock set to 0 days.

Submit Commitment CO into Workflow

- Select Save
 - You will receive notification re: the status of the workflow



Procurement

- Once approved by the Director of Capital Projects, the Project Manager sends notification to bidders

The screenshot shows the PMWeb software interface. The left sidebar contains a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main window displays the 'Procurement' details for '0014 - drywall'. The 'Program*' is 'DAN - Projects (Independent Resolution)' and the 'Project*' is 'Green Hall Phase 1 Fit Out'. The 'Bid Category' is 'drywall'. The 'Bidding Company' is 'Select Company'. The 'Bidding Contact' is 'Select a Contact'. The 'Estimate #' is '0'. The 'Revision' is '0'. The 'Workflow Status' is 'Draft'. The 'Bids Due' is 'Jun-13-2016' at '4:35 AM'. The 'Pre-bid' is 'Select Pre-bid'. The 'Commitment ID' is 'Stipulated Sur'. The 'Options' section includes checkboxes for 'This is a Sealed Bid', 'Lock Online Bids After Bids Due', 'Include Days Column in Online Bids', 'Include MWDDBE % Column in Online Bids', 'Include Manufacturer Columns in Online Bids', 'Include Bid Item UDFs in Online Bids', 'Require Acknowledgements', 'Require Nondisclosure Agreement', 'Show Bid Due Countdown Clock', and 'Lock Quantity in Online Bids'. A red circle highlights the 'Send' button in the top right corner of the main window.

The screenshot shows the email composition window in PMWeb. The 'From' field is 'Emily Folman'. The 'To' field is 'Emily Folman (Washington University Danforth Campus)'. The 'CC' field is 'Enter the Email(s)'. The 'BCC' field is 'Charles Charles (8760 ENGINEERING LLC) x', 'Sam Jones (ABC Drive Co) x', and 'John Kardos (OPTIMAL ENGINEERING SOLUTIO) x'. The 'Manual CC' field is 'Bid Notice'. The 'Subject' field is 'Bid Notice'. The 'Options' section includes a dropdown for 'Status', a dropdown for 'Notification type', a 'Reference' field, a 'Due Date' field set to 'Jun-13-2016' at '12:00 PM', a 'Reminder' checkbox checked, a 'Completed' checkbox, and a 'Completed Date' field. The 'Select To Attach To Email' section includes a table with columns 'Type' and 'Description'.

Type	Description
<input checked="" type="checkbox"/> -- Record Link --	Hyperlinks to Online Bids (bidders)
<input checked="" type="checkbox"/> -- Record Link --	Hyperlinks to Procurement (non-bidders)
<input type="checkbox"/> Report	Procurement Form
<input type="checkbox"/> Report	Procurement Report
<input type="checkbox"/> Report	Portfolio Summary (with Google Address)

The screenshot shows the email preview window in PMWeb. The 'Font Name' is 'Real...'. The email body text is: 'Thank you for your interest in bidding on the Washington University Green Hall Phase 1 Fit Out. The bid date for the project is **Monday, June 13, 2016, 4:45:00 PM**. Bids shall be submitted through the PMWeb Online bidding process. There will be a mandatory pre-bid walkthrough [User type in date and time]. We will meet in the [User type in location]. Please plan to attend this meeting. ***Please Send Acknowledgement of Receipt of this Notification to [Project Manager]***'. The email is signed 'Sincerely, [Project Manager]'. The bottom of the window shows 'Design', 'HTML', and 'Preview' buttons.

Procurement

- Notice that the selected bidders have been added as recipients in the bcc field
- In the “To” field add yourself and any others you want to copy on this notification
- Status – leave blank
- Notification type – select appropriate notification type

Send Save Close

From: Emily Follman System

To: Emily Follman [Washington University Danforth Campus] x

CC: Enter the Email(s)

BCC: Charles Charles [8760 ENGINEERING LLC] x Sam Jones [ABC Drive Co] x John Kardos [OPTIMAL ENGINEERING SOLUTIO] x

Manual CC

Subject: Bid Notice

Options

Status: [Dropdown]

Notification type: [Dropdown]

Reference

Due Date: Jun-13-2016 12:00 PM

Reminder:

Completed:

Completed Date: [Calendar]

Select To Attach To Email

<input type="checkbox"/>	Type	Description
<input checked="" type="checkbox"/>	-- Record Link --	Hyperlinks to Online Bids (bidders)
<input checked="" type="checkbox"/>	-- Record Link --	Hyperlinks to Procurement (non-bidders)
<input type="checkbox"/>	Report	Procurement Form
<input type="checkbox"/>	Report	Procurement Report
<input type="checkbox"/>	Report	Portfolio Summary (with Google Address)

Page Size 5

Options

Status: [Dropdown]

Notification type: **Invitation to Bid**

Reference: Addenda

Due Date: Alternate

Reminder: Invitation to Bid

Completed:

Completed Date: [Calendar]

Font Name Real... B I U abc [Icons]

All -

Thank you for your interest in bidding on the Washington University Green Hall Phase 1 Fit Out.

The bid date for the project is **Monday, June 13, 2016, 4:45:00 PM**. Bids shall be submitted through the PMWeb Online bidding process.

There will be a mandatory pre-bid walkthrough [User type in date and time]. We will meet in the [User type in location]. Please plan to attend this meeting.

Please Send Acknowledgement of Receipt of this Notification to [Project Manager]

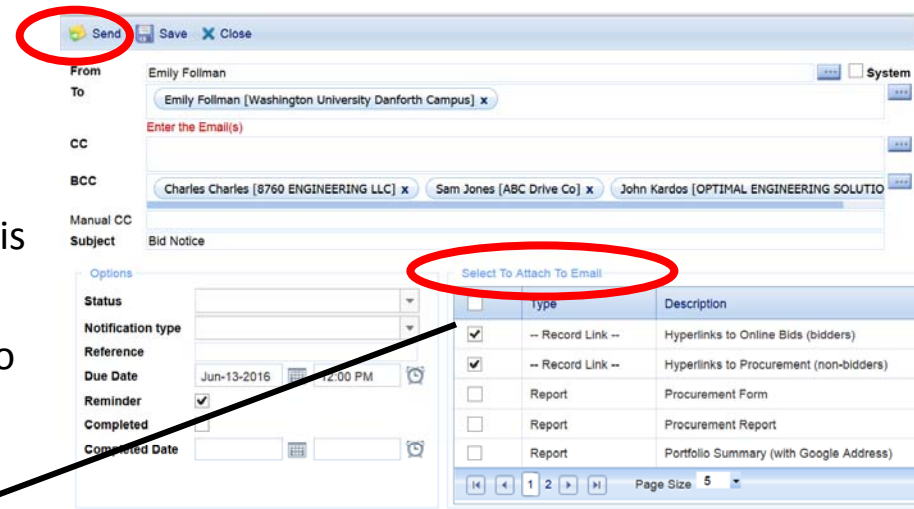
Sincerely,
[Project Manager]

Design HTML Preview

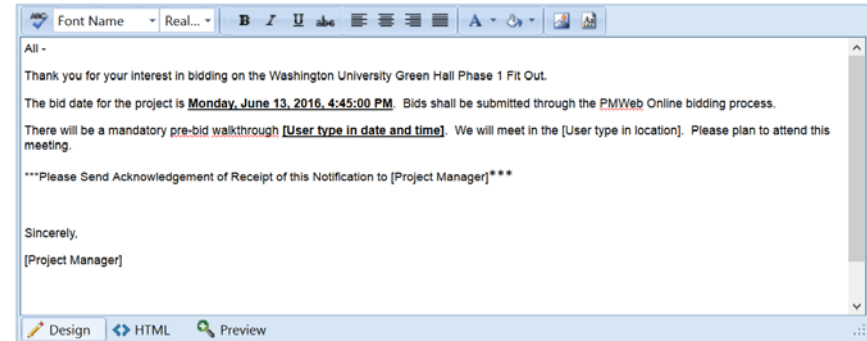
Procurement

“Select to Attach to Email” section

- Record Link will be automatically selected – this includes links to the appropriate records
- Select any attachments that you have added to the record
- Send notification



<input type="checkbox"/>	Type	Description
<input checked="" type="checkbox"/>	-- Record Link --	Hyperlinks to Online Bids (bidders)
<input checked="" type="checkbox"/>	-- Record Link --	Hyperlinks to Procurement (non-bidders)
<input type="checkbox"/>	Report	Procurement Form
<input type="checkbox"/>	Report	Procurement Report
<input type="checkbox"/>	Report	Portfolio Summary (with Google Address)
<input type="checkbox"/>	Report	Portfolio View
<input type="checkbox"/>	Merge Template	Procurement Test
<input type="checkbox"/>	Merge Template	Form of Bidder's Proposal
<input checked="" type="checkbox"/>	Attachment	New Project - 11-16-15



Procurement

- The bid due clock will count down until time runs out
 - Note: You will **not** receive notification when bids are submitted
 - You can check status of bidders in the procurement record

The screenshot displays the PMWeb software interface. The top navigation bar shows 'Planning > Procurement > Procurement'. The main content area is divided into a left sidebar with a tree view (Planning, Estimates, Procurement, etc.), a central form for procurement details, and a table at the bottom.

Procurement Details Form:

- Program*: DAN - Projects (Independent Resolution)
- Project*: Green Hall Phase 1 Fit Out
- Procurement #: 0014
- Description: drywall
- Bid Category: -- Select --
- Bidding Company: Select Company...
- Bidding Contact: Select a Contact...
- Estimate #: 0
- Revision: [Field] Date: [Field]
- Workflow Status: Submitted
- Bids Due: Jun-13-2016 Time: 4:50 PM
- Pre-bid: Select Pre-bid
- Commitment ID: [Field] Type: Stipulated Su

Options Panel:

- This is a Sealed Bid
- Lock Online Bids After Bids Due
- Include Days Column in Online Bids
- Include MWDBE % Column in Online Bids
- Include Manufacturer Columns in Online Bids
- Include Bid Item UDFs in Online Bids
- Require Acknowledgements
- Require Nondisclosure Agreement
- Show Bid Due Countdown Clock
- Lock Quantity in Online Bids

Table:

Award	Company	Invitation Status	Best Bid	NDA	Bid Re	Bid Status
	8760 ENGINEERING LLC	No Decision	000421	<input type="checkbox"/>	0	Draft
	ABC Drive Co	Accepted	000422	<input type="checkbox"/>	0	Submitted
	OPTIMAL ENGINEERING SOLUTIONS	Accepted	000423	<input type="checkbox"/>	0	Submitted

A red circle highlights the 'Bid Status' column in the table, showing 'Draft', 'Submitted', and 'Submitted' for the three rows.

Procurement – Online Bids Received

- Vendors may submit their bids in PMWeb
- View bid records in the Online Bidding module
- Submission of bid by bidder starts a workflow in the online bid record



The screenshot shows the PMWeb interface for 'Online Bidding'. The main content area displays details for bid #423, 'OPTIMAL ENGINEERING SOLUTIONS'. The 'Bidder Information' section shows the company name, bid total of \$184.00, and 4 amount lines. The 'Bid Due' section shows 0 days and 0 hours remaining. The 'Workflow Status' is 'Submitted' as of June 13, 2016. Below this is a table of bid items:

Line Number	Project	Item	Description	UOM	Est. Quantity	Bid Quantity	Unit Price
Bid Section:							
011	Green Hall Phase	000353	100 30 00 Reimbursables		1.00	1.00	\$14.00
012	Green Hall Phase	000308	160 00 00 Contingency		1.00	1.00	\$14.00
013	Green Hall Phase	000331	180 70 10 Furniture (1.00	1.00	\$16.00
014	Green Hall Phase	000339	190 00 00 Capital Projects Fees (over :		1.00	1.00	\$17.00
Bid Section: Base Bid							

Procurement – Online Bids Received

- The details tab contains information for each line item that the bidder has submitted.
- Review the bids
- The PM can level the bids

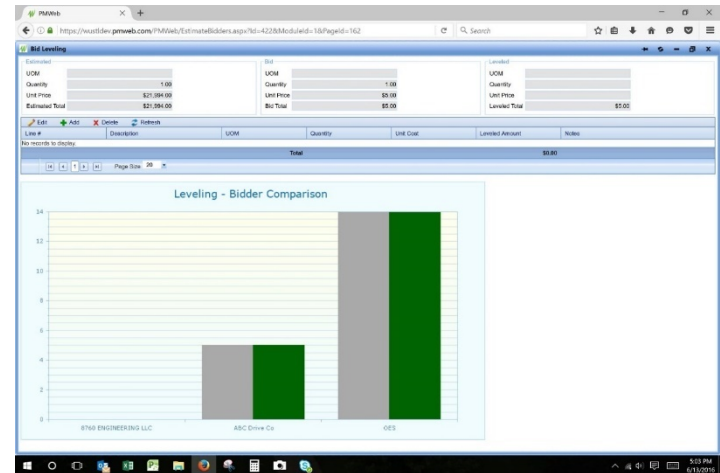
← Details tab in Online Bid

Line Number	Project	Item	Description	Scope Of Work	UOM	Est. Quantity	Bid Quantity	Unit Price	Total Amount	Leveled Total
011	Green Hall Phase	000353	100 30 00 Reimbursables			1.00	1.00	\$100.00	\$100.00	\$100.00
012	Green Hall Phase	000308	160 00 00 Contingency			1.00	1.00	\$2,000.00	\$2,000.00	\$2,000.00
013	Green Hall Phase	000331	180 70 10 Furniture (1.00	1.00	\$300.00	\$300.00	\$300.00
014	Green Hall Phase	000339	190 00 00 Capital Projects Fees (over :			1.00	1.00	\$0.00	\$0.00	\$0.00
									\$2,400.00	\$2,400.00

Procurement – Online Bids Received

- To level the bid record
 - Select “Leveled Total” checkbox for the item that you want to bid
 - In the “Bid Leveling” window, you have the ability to add or subtract dollars from each bid as necessary

Scope Of Work	UOM	Est. Quantity	Bid Quantity	Unit Price	Total Amount	Leveled Total	Days
		1.00	1.00	\$14.00	\$14.00	<input type="checkbox"/>	\$14.00
		1.00	1.00	\$14.00	\$14.00	<input type="checkbox"/>	\$14.00
		1.00	1.00	\$16.00	\$16.00	<input type="checkbox"/>	\$16.00
		1.00	1.00	\$17.00	\$17.00	<input type="checkbox"/>	\$17.00
					\$61.00	<input type="checkbox"/>	\$61.00
		1.00	1.00	\$18.00	\$18.00	<input type="checkbox"/>	\$18.00
		1.00	1.00	\$19.00	\$19.00	<input type="checkbox"/>	\$19.00
		1.00	1.00	\$20.00	\$20.00	<input type="checkbox"/>	\$20.00
		1.00	1.00	\$21.00	\$21.00	<input type="checkbox"/>	\$21.00
		1.00	1.00	\$22.00	\$22.00	<input type="checkbox"/>	\$22.00
					\$100.00	<input type="checkbox"/>	\$100.00
		1.00	1.00	\$23.00	\$23.00	<input type="checkbox"/>	\$23.00
					\$23.00	<input type="checkbox"/>	\$23.00
Total					\$184.00	<input type="checkbox"/>	\$184.00



Procurement – Online Bids Received

- You can add data into each line item in the bid record
- Add to the notes field information as to why you are adding or subtracting dollars from the bid

The screenshot displays the PMWeb software interface for bid leveling. The top section shows three columns for 'Estimated', 'Bid', and 'Leveled' data. Below this is a table with columns for 'Line #', 'Description', 'UOM', 'Quantity', 'Unit Cost', 'Leveled Amt', and 'Notes'. A red circle highlights the 'Leveled Amt' and 'Notes' columns. The 'Leveled Amt' column shows values of \$500.00, \$300.00, and a total of \$800.00. The 'Notes' column contains 'Missed Outlets in Lab' and 'Forget T&B'. Below the table is a bar chart titled 'Leveling - Bidder Comparison' comparing the leveling amounts for three bidders: 8760 ENGINEERING LLC, ABC Drive Co, and OES. The OES bidder has the highest leveling amount, followed by 8760 ENGINEERING LLC, and ABC Drive Co has the lowest.

Line #	Description	UOM	Quantity	Unit Cost	Leveled Amt	Notes
001	Electric Revision		1.00	\$500.00	\$500.00	Missed Outlets in Lab
002	HVAC Fix		1.00	\$300.00	\$300.00	Forget T&B
Total					\$800.00	

Procurement – Online Bids Received

- Approve the Online Bidding record to lock the bid
- Note: once you approve the bid, you can't level the bid any further

Procurement – Online Bids Received

- For each bidder
 - If you level a bid and have supporting documentation, upload to the **procurement** record
 - Then go back to the **online bid** record and final approve the workflow

Procurement

- Once you have completed approving the online bidding records, return to the **Procurement** record
- In the bid items tab, scroll to the right to view and compare leveled costs to determine lowest bidder

The screenshot shows the PMWeb interface with the 'Procurement' record selected. The 'Bid Items' tab is active, displaying a table of bid items with columns for Bid Item, Bidder, and Leveled Cost. The table is filtered to show items for 'Green Hall Phase 1 Fx Out'.

Bid Item	Bidder	Leveled Cost
001 Green Hall Phase 1 Fx Out 06 00 00 Woods, Plastics, and Compo	8760 ENGINEERING LLC	\$0.00
002 Green Hall Phase 1 Fx Out 07 00 00 Thermal and Moisture Protec	ABC Drive Co	\$19.00
003 Green Hall Phase 1 Fx Out 21 00 00 Fire Suppression	OPTIMAL ENGINEERING SOLUTIONS	\$439.00
004 Green Hall Phase 1 Fx Out 22 00 00 Plumbing	8760 ENGINEERING LLC	\$88.00
Total		\$915.00

The interface also shows a sidebar with navigation options like Planning, Estimates, Procurement, and Bid Items. A blue arrow labeled 'Bid Items' points to the 'Bid Items' tab, and a black arrow points to the table data.

Procurement

- Select (deselect) each item that you want to include (not include) in bid
- Verify that line item for bid section is accurate

Bidder Matrix						Bid Items						Addenda						Manage Bids						Specifications						N																	
Drag a column header and drop it here to group by that column																																															
Refresh -- All --																																															
Include In Bid	Line #	Project	Item	Description																																											
<input checked="" type="checkbox"/>	001	Green Hall Phase 1 F	000069	06 00 00 Woods, Plastics, and Compo																																											
<input checked="" type="checkbox"/>	002	Green Hall Phase 1 F	000074	07 00 00 Thermal and Moisture Protec																																											
<input checked="" type="checkbox"/>	003	Green Hall Phase 1 F	000149	21 00 00 Fire Suppression																																											
<input checked="" type="checkbox"/>	004	Green Hall Phase 1 F	000154	22 00 00 Plumbing																																											
<input checked="" type="checkbox"/>	005	Green Hall Phase 1 F	000160	23 00 00 Heating, Ventilating, and Air																																											
<input checked="" type="checkbox"/>	006	Green Hall Phase 1 F	000174	26 00 00 Electrical																																											
<input checked="" type="checkbox"/>	007	Green Hall Phase 1 F	000452	100 25 84 Acoustical																																											
<input checked="" type="checkbox"/>	008	Green Hall Phase 1 F	307	Expedited Schedule																																											
<input checked="" type="checkbox"/>	009	Green Hall Phase 1 F	154	022 00 00 Plumbing																																											

Procurement – Award Bid

Bidder Matrix	Bid Items	Addenda	Manage Bids	Specifications	Notes	Attachments
Drag a column header and drop it here to group by that column						
Edit	Add Bidders	Refresh	Delete	Award	Display	-- All --
Award	Company	Invitation Status	Best Bid	ND		
	8760 ENGINEERING LLC	No Decision	000215			<input type="checkbox"/>
	GRAINGER INC	No Decision	000216			<input type="checkbox"/>
	OPTIMAL ENGINEERING SOLUTIONS	No Decision	000217			<input type="checkbox"/>

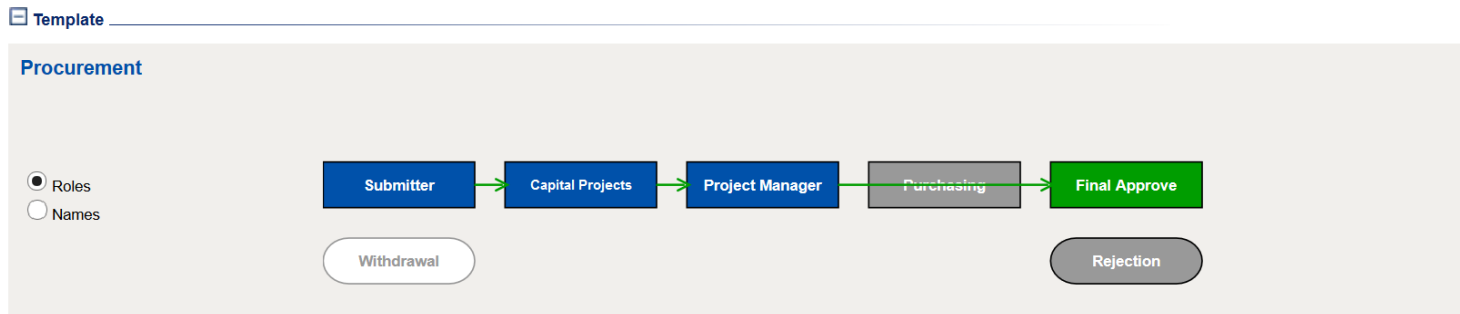
1. Select winning bidder by highlighting the line
2. Select award (it will appear next to awardee)
3. Save record

Attach SSJ via document manager to the procurement record. You can also attach to the commitment record once the commitment is generated.

Include in Bid	Line #	Project	Item	Description	Scope Of Work	UOM	Cost Code
<input checked="" type="checkbox"/>	001	Green Hall Phase 1 F	000069	06 00 00 Woods, Plastics, and Comp			01-006-006 00 00
<input checked="" type="checkbox"/>	002	Green Hall Phase 1 F	000074	07 00 00 Thermal and Moisture Protec			01-007-007 00 00
<input checked="" type="checkbox"/>	003	Green Hall Phase 1 F	000149	21 00 00 Fire Suppression			01-021-021 00 00
<input checked="" type="checkbox"/>	004	Green Hall Phase 1 F	000154	22 00 00 Plumbing			01-022-022 00 00

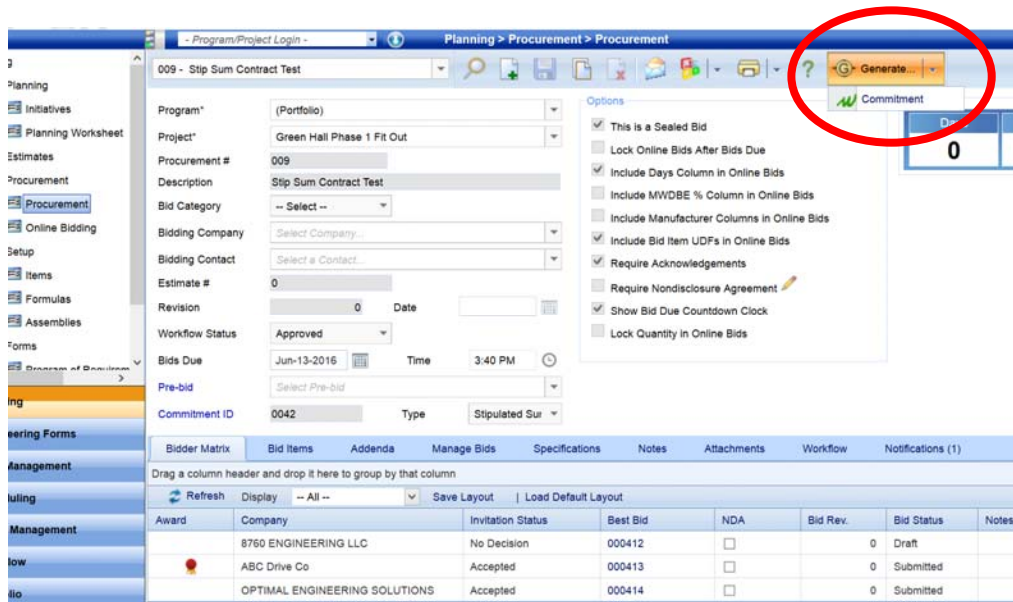
Procurement

- Project Manager (PM) workflow approval
 - Determine if the bid time needs to be extended
 - If yes
 - Select approve in order to submit the record to the contract manager in Resource Management to extend the time. **Resource Management is the only role that is able to extend the time of a bid.**
 - If no
 - Select final approve in order to provide final approval of the record
 - Ensure bid is awarded prior to FINAL APPROVE step



Procurement – Generate Commitment

- Once the Procurement record receives final approval, generate a commitment with bid info.
 - Select Generate > Commitment



The screenshot displays a software interface for procurement management. The main window is titled "009 - Stip Sum Contract Test". The interface includes a left-hand navigation pane with various menu items such as "Planning", "Estimates", "Procurement", "Setup", "Forms", and "Management". The central area contains a form with fields for "Program*", "Project*", "Procurement #", "Description", "Bid Category", "Bidding Company", "Bidding Contact", "Estimate #", "Revision", "Workflow Status", "Bids Due", "Pre-bid", and "Commitment ID". To the right of the form is an "Options" section with several checkboxes, including "This is a Sealed Bid", "Lock Online Bids After Bids Due", "Include Days Column in Online Bids", "Include MWDDBE % Column in Online Bids", "Include Manufacturer Columns in Online Bids", "Include Bid Item UDFs in Online Bids", "Require Acknowledgements", "Require Nondisclosure Agreement", "Show Bid Due Countdown Clock", and "Lock Quantity in Online Bids". A red circle highlights the "Generate..." button in the top right corner, which has a dropdown menu with "Commitment" selected. Below the form is a table with columns for "Bidder Matrix", "Bid Items", "Addenda", "Manage Bids", "Specifications", "Notes", "Attachments", "Workflow", and "Notifications (1)". The table contains three rows of data:

Award	Company	Invitation Status	Best Bid	NDA	Bid Rev.	Bid Status	Notes
	8760 ENGINEERING LLC	No Decision	000412	<input type="checkbox"/>	0	Draft	
	ABC Drive Co	Accepted	000413	<input type="checkbox"/>	0	Submitted	
	OPTIMAL ENGINEERING SOLUTIONS	Accepted	000414	<input type="checkbox"/>	0	Submitted	

Procurement – Generate Commitment

- In the Generate Commitment pop up window
 1. Select online bid quantities and costs radio button
 2. Select type of commitment
 3. Category - N/A

The screenshot shows the 'Generate Commitment' window with the following details:

- 1**: Radio button for 'Use Online Bid Quantities and Costs' is selected.
- 2**: 'Type' dropdown menu is set to 'Stipulated Sum Agree'.
- 3**: 'Category' dropdown menu is set to '-- Select --'.
- 4**: 'Copy' checkboxes for 'Clauses', 'Notes', and 'Attachments' are all checked.
- 5**: The 'Include' checkbox in the table header is checked.

Include	Project	Item	Description	UOM	Quantity	Unit Cost	Total Cost	Notes
<input checked="" type="checkbox"/>	Green Hall Phase 1 Fit Out	000069	06 00 00 Woods, Plastics, and Compo		1.00	\$17.00	17.00	
<input checked="" type="checkbox"/>	Green Hall Phase 1 Fit Out	000074	07 00 00 Thermal and Moisture Protec		1.00	\$19.00	19.00	
<input checked="" type="checkbox"/>	Green Hall Phase 1 Fit Out	000149	21 00 00 Fire Suppression		1.00	\$350.00	350.00	
<input checked="" type="checkbox"/>	Green Hall Phase 1 Fit Out	000154	22 00 00 Plumbing		1.00	\$98.00	98.00	
<input checked="" type="checkbox"/>	Green Hall Phase 1 Fit Out	000160	23 00 00 Heating, Ventilating, and Air		1.00	\$43.00	43.00	

Procurement – Generate Commitment

- In the Generate Commitment pop up window
 4. Copy – select all choices
 5. Once more chance to select/deselect what to includeSelect Generate commitment

1 Use Online Bid Quantities and Costs Use Procurement Quantities and Costs

Include	Project	Item	Description	UOM	Quantity	Unit Cost	Total Cost	Notes
5 <input checked="" type="checkbox"/>								
<input checked="" type="checkbox"/>	Green Hall Phase 1 Fit Out	000069	06 00 00 Woods, Plastics, and Compc		1.00	\$17.00	17.00	
<input checked="" type="checkbox"/>	Green Hall Phase 1 Fit Out	000074	07 00 00 Thermal and Moisture Protec		1.00	\$19.00	19.00	
<input checked="" type="checkbox"/>	Green Hall Phase 1 Fit Out	000149	21 00 00 Fire Suppression		1.00	\$350.00	350.00	
<input checked="" type="checkbox"/>	Green Hall Phase 1 Fit Out	000154	22 00 00 Plumbing		1.00	\$98.00	98.00	
<input checked="" type="checkbox"/>	Green Hall Phase 1 Fit Out	000160	23 00 00 Heating, Ventilating, and Air		1.00	\$43.00	43.00	

Procurement

- A commitment generated from an awarded bid will bring over all of the line items into the Details Tab in the commitment.
- The commitment type typically used in the this scenario is the Stipulated Sum Commitment Type.
- Complete the fields in the Specifications Tab for the commitment in the same manner as any other type of commitment.
- Complete the commitment record and submit into workflow in the same manner as any other type of commitment.

Enter a Bid as a Vendor Proxy

- If a vendor submits a paper bid instead of an online bid, the PM is able to enter the bid as a proxy for the vendor so that all information will be saved in PMWeb
 - PM navigate to the online bidding record for that vendor
 - Accept invitation
 - Enter unit price for items as appropriate; Save

The screenshot displays the PMWeb Online Bidding interface. The top navigation bar shows 'Planning > Procurement > Online Bidding'. The main content area is for bid 412 - 8760 ENGINEERING LLC. It includes fields for Bid # (412), Procurement # (009), Program (Portfolio), Project (Green Hall Phase 1 Fit), Description, Bid Category, Revision (0), Date (Jun-13-2016), Workflow Status (Draft), and Bids Due (Jun-13-2016 3:40 PM). The Bidder Information section shows Company (8760 ENGINEERING LLC), Bid Total (\$0.00), and 0.00 Amount Lines. The Acknowledgements section shows 9 Acknowledgements Remaining. A 'Bid Due' summary box shows 0 Days and 0 Hours. At the bottom, there are 'Decline Invitation' and 'Accept Invitation' buttons, with the latter circled in red. Below this is a table with columns: Line Number, Project, Item, Description, Scope Of Work, UOM, Est. Quantity, Bid Quantity, and Unit Price. The table contains two rows of items, with the 'Unit Price' column circled in red.

Line Number	Project	Item	Description	Scope Of Work	UOM	Est. Quantity	Bid Quantity	Unit Price
001	Green Hall Phase	000069	06 00 00 Woods, Plastics, and Compot			1.00	1.00	\$0.00
002	Green Hall Phase	000074	07 00 00 Thermal and Moisture Protect			1.00	1.00	\$0.00

Enter a Bid as a Vendor Proxy

- Submission tab
 1. Add Contact name
 2. Enter Bid Expire date
 3. Add contact phone number
 4. Select Acknowledgements

Details Addenda Scoring Ratings Submission Notes Attachments

Bidder Information

Company 8760 ENGINEERING LLC

Contact*

Bid Expires*

Change Order Fee 0.00%

Available To Start

Phone* Ext.

Email

Comments

Acknowledgements

Acknowledge	Type	Description	Date Ackno
<input type="checkbox"/>	Bid Items	06 00 00 Woods, Plastics, and C	
<input type="checkbox"/>	Bid Items	07 00 00 Thermal and Moisture	
<input type="checkbox"/>	Bid Items	21 00 00 Fire Suppression	
<input type="checkbox"/>	Bid Items	22 00 00 Plumbing	
<input type="checkbox"/>	Bid Items	23 00 00 Heating, Ventilating, ar	
<input type="checkbox"/>	Bid Items	26 00 00 Electrical	
<input type="checkbox"/>	Bid Items	100 10 00 Architectural Basic S	
<input type="checkbox"/>	Bid Items	100 21 00 Design Build Services	
<input type="checkbox"/>	Bid Items	100 25 50 Interior Design	
<input type="checkbox"/>	Bid Items	100 25 84 Acoustical	
<input type="checkbox"/>	Bid Items	100 30 00 Reimbursables	
<input type="checkbox"/>	Bid Items	160 00 00 Contingency	
<input type="checkbox"/>	Bid Items	180 70 10 Furniture (
<input type="checkbox"/>	Bid Items	190 00 00 Capital Projects Fees	

Page Size 20

Enter a Bid as a Vendor Proxy

Submit the bid as the vendor proxy

The screenshot shows the PMWeb Online Bidding interface. The top navigation bar includes the PMWeb logo, a menu icon, and a status bar with a shield icon and a power icon. The breadcrumb trail is "Planning > Procurement > Online Bidding". The main content area is titled "412 - 8760 ENGINEERING LLC" and contains a form for entering bid information. The form includes fields for Bid # (412), Procurement # (009), Program (Portfolio), Project (Green Hall Phase 1 Fit Out), Description, Bid Category, Revision (0), Date (Jun-13-2016), Workflow Status (Draft), Bids Due (Jun-13-2016), and Time (3:40 PM). A "Submit" button is circled in red. The right side of the form shows "Bidder Information" with Company (8760 ENGINEERING LLC), Bid Total (\$0.00), and Acknowledgements Remaining (7). Below the form is a table with columns: Details, Addenda, Scoring, Ratings, Submission, Notes, Attachments. The table shows two bid sections: "001 Green Hall Phase 000069 06 00 00 Woods, Plastics, and Compo" and "002 Green Hall Phase 000074 07 00 00 Thermal and Moisture Protec".

Line Number	Project	Item	Description	Scope Of Work	UOM	Est. Quantity
001	Green Hall Phase	000069	06 00 00 Woods, Plastics, and Compo			1.00
002	Green Hall Phase	000074	07 00 00 Thermal and Moisture Protec			1.00

PMWeb® Training

Initiative to Project Generation

Customer identifies facilities need

- Request received by facilities department
- Project Manager assigned
- Project Manager will enter project into PMWeb Planning module: Initiatives sub-category

Initiative Module

- Navigate to Initiative Module:
 - Planning Module > Initiatives sub- category

PMWeb

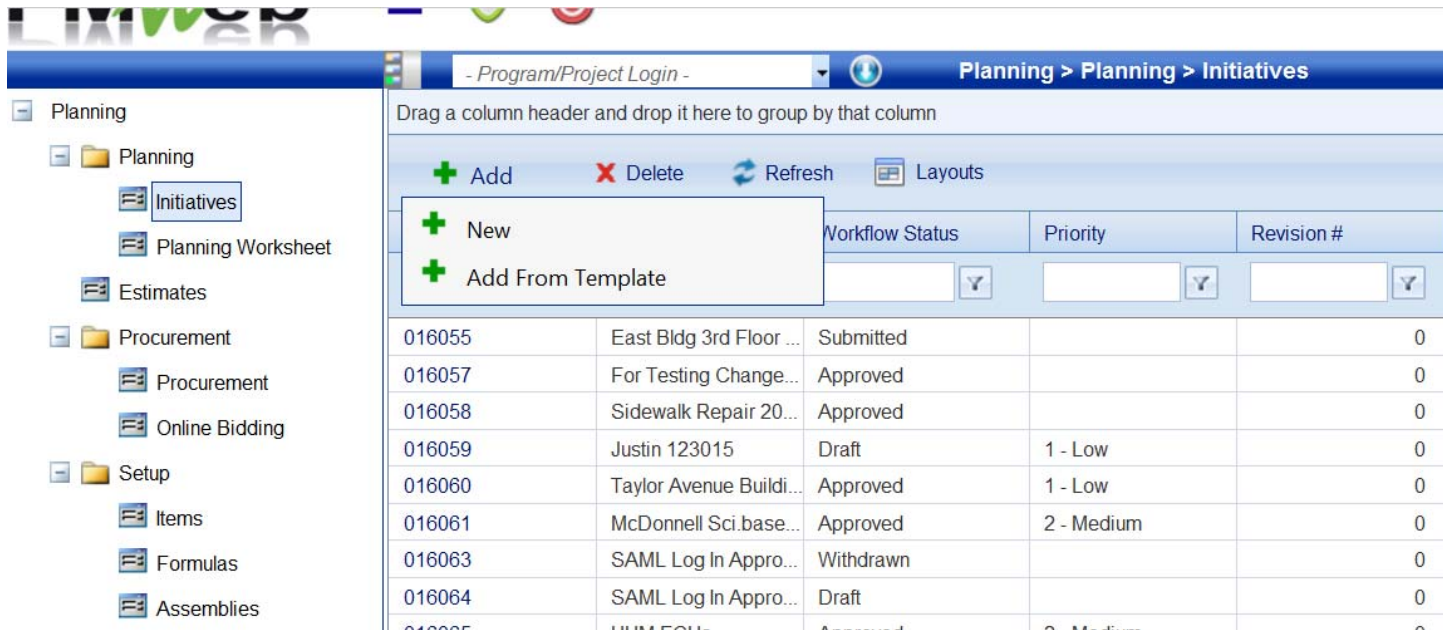
Planning > Planning > Initiatives

Record # Initiative Workflow Status Priority Revision # Revision Date Funding Source Funding Year Start Finish Type Project Manager Project Name

Record #	Initiative	Workflow Status	Priority	Revision #	Revision Date	Funding Source	Funding Year	Start	Finish	Type	Project Manager	Project Name
016055	East Bldg 3rd Floor ...	Submitted		0	12/28/2015	3425-82269 Med S...	2015	12/15/2015	3/30/2016	Renovation	John Brauer	
016057	For Testing Chang...	Approved		0	12/30/2015		2015			New Construction		For Testing Chang...
016058	Sidewalk Repair 20...	Approved		0	12/30/2015		2016			Maintenance / Ren...	Nick Dochwat	Sidewalk Repair 20...
016059	Justin 123015	Draft	1 - Low	0	12/30/2015	7800-68997A Millbr...	2015	12/30/2015	6/30/2016	Renovation	Justin Orr	
016060	Taylor Avenue Build...	Approved	1 - Low	0	12/31/2015	3425-82269 Med S...	2015			Renovation	Steve Sobo	Taylor Avenue Build...
016061	McDonnell Sci bas...	Approved	2 - Medium	0	1/6/2016	3425-82269 Med S...	2016			Renovation	Nick Dochwat	McDonnell Sci bas...
016063	SAML Log In Approv...	Withdrawn		0	1/12/2016		2016			New Construction		
016064	SAML Log In Approv...	Draft		0	1/12/2016		2016			New Construction		
016065	HMM FCUs	Approved	2 - Medium	0	1/12/2016		2016			Maintenance / Ren...		HMM FCUs
016066	Forecast Test	Approved		0	1/14/2016		2016					Forecast Test
016068	East 3 Psychiatry R...	Approved		0	1/14/2016	3425-82270 Med S...	2016	12/15/2015	4/30/2016	Renovation	Kelay Brunetto	East 3 Psychiatry R...
016074	DanforthCap World...	Draft		0	1/15/2016		2016					DanforthCap World...
016075	BR Workflow Test2	Draft		0	1/15/2016		2016					BR Workflow Test2
016076	BR Attempt #3	Draft		0	1/15/2016		2016					BR Attempt #3
016077	Test Initiative	Approved		0	1/19/2016		2016				Paul Duell	
016078	Budget Testing DO...	Approved		0	1/19/2016		2016					Budget Testing DO...
016079	Budget Test	Approved		0	1/19/2016		2016					Budget Test
016080	4480 Clayton - Repl...	Draft		0	1/19/2016		2017	8/1/2016	9/30/2016	Maintenance / Ren...		
016082	Maternity Hospital - ...	Draft		0	1/19/2016		2017	1/19/2016	1/19/2016	Maintenance / Ren...		
016083	Cap Plan Funding ...	Draft		0	1/20/2016	0259-68997A Tran...	2016					Cap Plan Funding ...

Create New Initiative From Template

- Click the Arrow Drop Down next to the icon 
- Select “Add From Template”



The screenshot shows a software interface with a navigation pane on the left and a main data table on the right. The navigation pane includes folders for Planning, Procurement, and Setup, with sub-items like Initiatives, Planning Worksheet, Estimates, Procurement, Online Bidding, Items, Formulas, and Assemblies. The main area has a header with a dropdown menu set to '- Program/Project Login -' and a breadcrumb 'Planning > Planning > Initiatives'. Below the header is a toolbar with 'Add', 'Delete', 'Refresh', and 'Layouts' buttons. A dropdown menu is open over the 'Add' button, showing 'New' and 'Add From Template' options. Below the menu is a table with columns for ID, Name, Workflow Status, Priority, and Revision #.

		Workflow Status	Priority	Revision #
016055	East Bldg 3rd Floor ...	Submitted		0
016057	For Testing Change...	Approved		0
016058	Sidewalk Repair 20...	Approved		0
016059	Justin 123015	Draft	1 - Low	0
016060	Taylor Avenue Buildi...	Approved	1 - Low	0
016061	McDonnell Sci.base...	Approved	2 - Medium	0
016063	SAML Log In Appro...	Withdrawn		0
016064	SAML Log In Appro...	Draft		0
016065	UIM FOL...	Approved	2 - Medium	0

Select Template

- WUSM/DAN each have project templates
- Select template and click OK

Select "OK"

Select template

	Project Name	Record #	Project Status	Workflow Status	Program	Type	Category	WBS	Location
<input checked="" type="checkbox"/>	** Template - Integ...	TEMPINT01		Draft	NO WKFLOW - IN...				
<input type="checkbox"/>	** TEMPLATE: Da...	TEMPDAN01		Draft	Danforth Capital Pr...				
<input type="checkbox"/>	** TEMPLATE: Da...	TEMPDAN02		Draft	Danforth Repair an...				
<input type="checkbox"/>	** TEMPLATE: W...	TEMPWUSM03		Draft	WUSM Departmen...				
<input type="checkbox"/>	** TEMPLATE: W...	TEMPWUSM04		Draft	WUSM Energy				
<input type="checkbox"/>	** TEMPLATE: W...	TEMPWUSM05		Draft	WUSM Repair and...				
<input type="checkbox"/>	**TEMPLATE2: Re...	TEMPRES08		Draft	Danforth Resolutio...				

Add Initiative Details

- Add: Project Name, Location, Project Manager

The screenshot displays the PMWeb software interface for adding initiative details. The form includes the following fields and values:

- Initiative ID*: 16103
- Name*: Training Manual Project
- Program: -- Select --
- Type: -- Select --
- Category: -- Select --
- Plan Name: [Empty]
- Status/Decision: [Empty]
- Location: select a location...
- Currency: Dollar (United States of America)
- Ending Year: (None)
- Priority: -- Select --
- Sponsor: Select a Contact...
- Funding Source: -- Select --
- Project Manager: Select a Contact...

The interface also features a sidebar with navigation options (Planning, Estimates, Procurement, Setup, Items, Formulas, Assemblies) and a table at the bottom for displaying records. The table has columns for Line #, Item, BIM ID, Resource, Resource Type, Description, UOM, Quantity, Ext. Quantity, Unit Cost, Ext. Cost, and Total Cost. The current view shows "No records to display."

Approve and Save Initiative Record

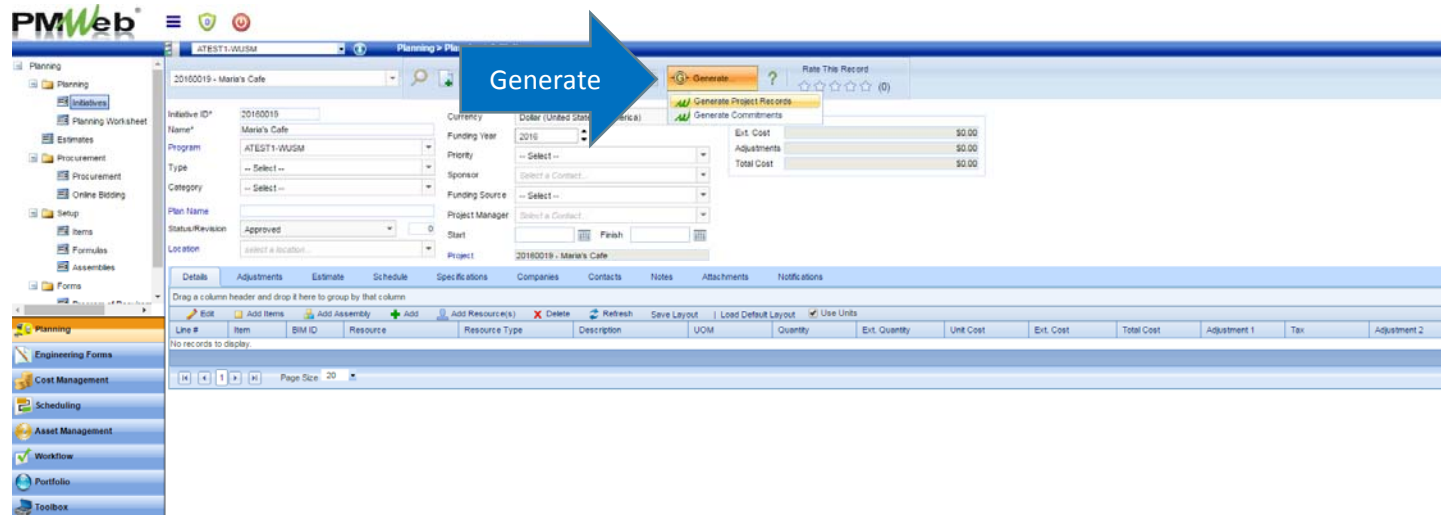
- Change Status/Revision field to “Approved”
- Save the initiative

The screenshot displays the PMWeb software interface for managing initiative records. The main form shows details for initiative 20160019, 'Marie's Cafe'. The 'Status/Revision' dropdown menu is open, and 'Approved' is selected. A blue arrow labeled 'Status approved' points to this dropdown. Another blue arrow labeled 'Save record' points to the 'Save' button in the top right corner of the form. The interface includes a left sidebar with navigation options like 'Planning', 'Estimates', and 'Scheduling'. A table at the bottom shows a list of records, currently empty.

Line #	UOM	Description	Quantity	Ext. Quantity	Unit Cost	Ext. Cost	Total Cost	Adjustment 1	Tax
No records to display.									

Initiative > Project

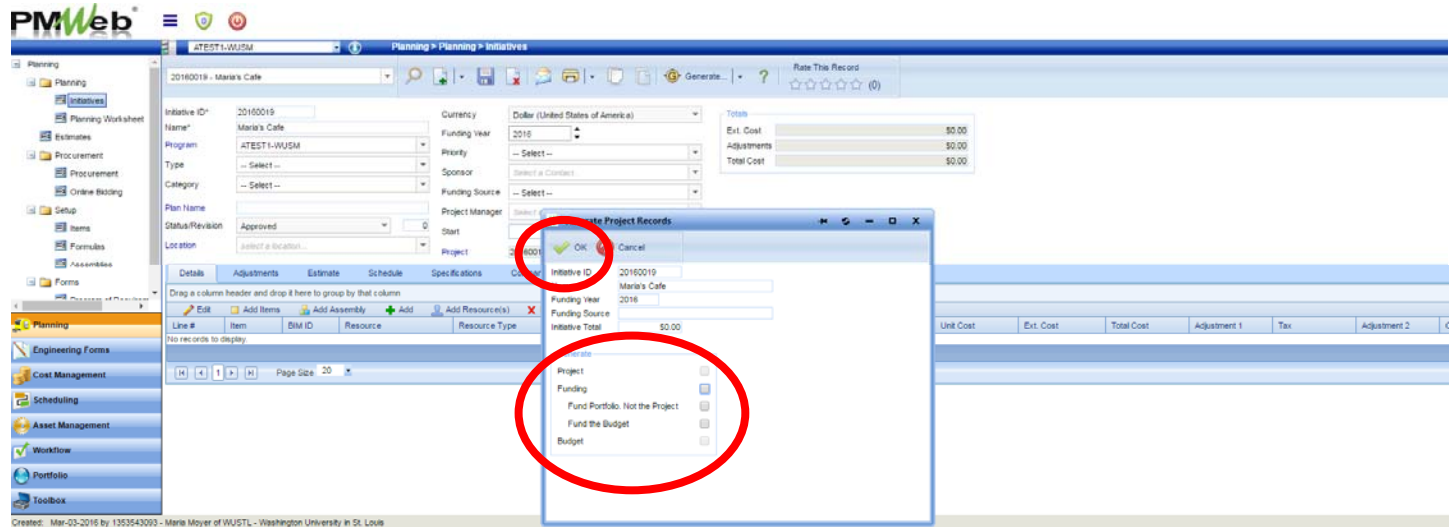
- Select Generate, then “generate project”



The screenshot displays the PMWeb software interface. A large blue arrow labeled "Generate" points to the "Generate" button in the top right corner. A dropdown menu is open, showing options: "Generate Project/Resource" (highlighted), "Generate Commitments", "Est. Cost", "Adjustments", and "Total Cost". The interface includes a left sidebar with navigation options like "Planning", "Estimates", and "Procurement". The main area shows project details for "20160019 - Maria's Cafe", including fields for Initiative ID, Name, Program, Type, Category, Plan Name, Status/Revision, Location, Currency, Funding Year, Priority, Sponsor, Funding Source, Project Manager, Start, and Finish. A table at the bottom shows columns for Line #, Item, BIM ID, Resource, Resource Type, Description, UOM, Quantity, Est. Quantity, Unit Cost, Est. Cost, Total Cost, Adjustment 1, Tax, and Adjustment 2. The table currently displays "No records to display."

Generate Project Record

- In “Generate Project Records” window, uncheck all items and click OK



View Project

- Two ways to navigate to your project
- Portfolio > Projects module

PMWeb

Portfolio > Lists > Projects

Drag a column header and drop it here to group by that column

Programs: *AP Projects: *AP *AP + Add X Delete Refresh Layouts

Project Name	Record #	Project Status	Workflow Status	Program	Type	Category	Program VR5	Location	Address 1	Address 2	Client
Golf Course Construction	2015608		Draft	ATEST1-DAN	New Construction						
Orn Test 2 - 04192016	2015608		Draft	ATEST1-DAN							
Brown School of Social Wor	2011921		Draft	ATEST1-DAN							
Julie's procurement test prop	2011922		Draft	ATEST1-DAN							
***Workflow testing template*	2011925		Draft	WORKFLOW							
MULTIPLE CUSTOMER TEST	2011927		Draft	WORKFLOW							
Test PMWeb support	2011928		Draft	Danforth Capital Project				South Medical Building			
Julie's Location test on a terr	2011930		Draft	WORKFLOW							
Test existing locations	2011931		Draft					South Medical Building			
Urbauer Hall SPOC Lab	2011933		Draft	ATEST1-DAN	Renovation						
Urbauer Hall SPOC Lab-NOT	2011934		Draft	ATEST1-DAN	Renovation						
Lab Renovation-CA Test	2011937		Draft	ATEST1-DAN	Renovation						
FitOut TEST	2011938		Draft	ATEST1-WUSM	Fitout						
Danforth SFund Misc Invoice	005555		Draft	ATEST1-DAN							
RJL Main Test Project (Basec	005561	Programming / Plannin	Draft	ATEST1-WUSM	Renovation	Building Facade		Ridgley Hall			
Danforth Project Name Here	170005		Draft	ATEST1-DAN				Milbrook Bldg			
GOIF CCourse maintenance	170006		Draft	ATEST1-DAN	Land Survey	Lab					
Barnard 2 Biostats - Renova	170007		Draft	ATEST1-WUSM	Renovation			Barnard Hospital			
EMILY Testing vendor securi	170013		Draft	ATEST1-DAN				Urbauer Hall			
Emily 2 test vendor security	170015		Draft	ATEST1-WUSM				Urbauer Hall			

6/20/20

Washington University in St. Louis
FORMATION TECHNOLOGY

View Project

- Two ways to navigate to your project
- Project Center

Project center tab

Select project

Program: ATEST1-WUSM
Project ID*: 2014615XGMA1
Name*: Moyer Cafe
Location: WUSM - ** Washington Universit
Project Status: -- Select --
Project Type: New Construction
Category: -- Select --
Work-flow Status: Draft
Currency: Dollar (United States of America)
Target Budget: \$0.00
Target Revenue: \$0.00
Target Duration: 0 UOM -- Sele
Target Start/Finish:
Actual Start/Finish:
Percent Complete: 0.00%
Scope:
Select multiple files to upload or drop files in the box below
Select

Navigator

Planning

Record Type	Pending	Approved
Estimates	0	0
Initiatives	0	0
Online Bidding	0	0
Procurement	0	0
Program of Requirements (PMPOR)	0	0

Engineering Forms

Record Type	Pending	Approved
Action Items	0	0
Correspondence	0	0
Daily Reports	0	0
Drawing Lists	0	0
Drawing Sets	0	0
Meeting Minutes	0	0
Online Submittals	0	0
Punch Lists	0	0
RFIs	0	0
Safety Forms	0	0
Submittal Sets	0	0
Submittal Items	0	0
Transmittals	0	0
Emergency Form	0	0

Cost Management

Record Type	Pending	Approved
A/P Payments	0	0
Budget Payments	0	0

Schedule

Target: Projected:

Budget

Target: \$0.00
Anticipated Cost: \$0.00

Custom Fields

Project Status Updates	Square Footage	Assignments
Associated School/Department (Danforth Only)	Funding Allocations	Planning and Project Request Form
LEED Information	Project Ratings	Admin Use Only

Spec	UOM	Data	Notes
Does Project Include a Move			
Weekly Status Update			
Plan for Next Week			
Issues and Risks Identified			
Total Project Budget			

Enter project planning information

- Pertinent project intake information will be entered in the planning and project request form

The screenshot displays the PMWeb software interface. The main window is titled 'Project Center' and shows a form for entering project information. The form includes fields for Program, Project ID, Name, Location, Project Status, Project Type, Category, Work Flow Status, Currency, Target Budget, Target Revenue, Target Duration, Target Start/Finish, Actual Start/Finish, Percent Complete, and Scope. A red circle highlights the 'Planning and Project Request Form' option in the Custom Fields menu. The interface also includes a Navigator pane on the left and a Schedule/Budget pane on the right.

Record Type	Pending	Approved
Estimates	0	0
Initiatives	0	0
Online Bidding	0	0
Procurement	0	0
Program of Requirements (P&RQR)	0	0
Engineering Forms		
Record Type	Pending	Approved
Action Items	0	0
Correspondence	0	0
Daily Reports	0	0
Drawing Lists	0	0
Drawing Sets	0	0
Meeting Minutes	0	0
Online Submittals	0	0
Punch Lists	0	0
RFI's	0	0
Safety Forms	0	0
Submittal Sets	0	0
Submittal Items	0	0
Transmittals	0	0
Emergency Form	0	0
Cost Management		
Record Type	Pending	Approved
AP Payments	0	0
Budget Requests	0	0
Budgets	0	0
Commitment CO's	0	0
Commitments	0	0

Program of Requirements (PMPOR)

- Complete the program of requirements information by selecting the Program of

The screenshot displays the RPMWeb software interface. The main window is titled "Project Center" and shows details for a project named "Moyer Cafe". The "Category" dropdown menu is set to "Program of Requirements (PMPOR)", which is highlighted with a red circle. The interface includes a left sidebar with navigation options such as "Planning", "Estimates", "Procurement", "Setup", "Forms", "Engineering Forms", "Cost Management", "Scheduling", "Asset Management", "Workflow", "Portfolio", and "Toolbox". The main area contains various data fields and tables, including a "Navigator" table with columns for "Record Type" and "Pending Approved".

Record Type	Pending	Approved
Estimates	0	0
Initiatives	0	0
Program of Requirements (PMPOR)	0	0

Record Type	Pending	Approved
Action Items	0	0
Correspondence	0	0
Daily Reports	0	0
Drawing Lists	0	0
Drawing Sets	0	0
Meeting Minutes	0	0
Online Submittals	0	0
Punch Lists	0	0
RFIs	0	0
Safety Forms	0	0
Submittal Sets	0	0
Submittal Items	0	0
Transmittals	0	0
Emergency Form	0	0

Record Type	Pending	Approved
AP Payments	0	0
Budget Requests	0	0
Budgets	0	0
Commitment COs	0	0
Commitments	0	0

Program of Requirements (PMPOR)

- Enter project number and select project
- Complete the form and save

PMWeb

Program of Requirements (PMPOR)

Project Information

Project Number	
Project Name	Select Project
Planner/PM	
Occupant Department #	
Occupant Department Name	
Assignee Dept # (if different than Occupant)	
Assignee Dept Name (if different than Occupant)	

If existing space is being vacated, provide

Building Number for Vacated Space	
Building Name for Vacated Space	
Date Space Being Vacated	April 27, 2016
Is the space being returned to the Dean or backfilled by Department?	
New Assignee Department Number	
New Occupant Department Number	

Purpose of Project

Background

- Describe the primary mission and objectives of the program or activity.
- Indicate new faculty and/or grants which might increase the use of the facility.
- Identify new policies/procedures or external regulatory requirements, if applicable.
- List the names of the people representing the department function

Additional project information

- Additional tabs to gather project information
- Project Date Tracking tab

The screenshot shows the PMWeb application interface. The top navigation bar includes 'Cost Management > Budgets > Cost Codes'. The 'Project Center' is active, displaying details for 'Conne Test1 *DO NOT DELETE*'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation tabs for Planning, Engineering Forms, Cost Management (highlighted), Scheduling, Asset Management, Workflow, Portfolio, and Toolbox.
- Project Details:** Fields for Program (ATEST1-0AN), Project ID (20160050), Name, Location, Project Status, Project Type (Renovation), Category, Workflow Status (Draft), Currency (Dollar), Target Budget (\$140,000.00), Target Revenue (\$0.00), Target Duration (0 UOM), Target Start/Finish, Actual Start/Finish, Percent Complete (0.00%), and Scope.
- Navigator:** Lists various record types under Planning, Engineering Forms, and Cost Management, with columns for Pending and Approved counts.
- Custom Fields:** A table with columns for UOM, Date, and Notes. A red circle highlights the 'Project Date Tracking' tab in this section.

Record Type	Pending	Approved
Estimates	0	0
Initiatives	0	0
Online Bidding	0	0
Procurement	0	0
Program of Requirements (PMOR)	0	0
Action Items	0	0
Correspondence	0	0
Daily Reports	0	0
Drawing Lists	0	0
Drawing Sets	0	0
Meeting Minutes	0	0
Online Submittals	0	0
Punch Lists	0	0
RFIs	0	0
Safety Forms	0	0
Submittal Sets	0	0
Submittal Items	0	0
Transmittals	0	0
Emergency Form	0	0
AP Payments	0	0
Budget Requests	0	0
Budgets	0	1

Additional project information

- Additional tabs to gather project information
- Square footage

The screenshot displays the PMWeb software interface. The main content area is titled 'Project Center' and shows details for a project named 'Corrie Test *DO NOT DELETE*'. The interface is divided into several sections:

- Left Navigation Panel:** Lists various project management functions such as Budgets, Cost Codes, Contracts, and Planning.
- Project Center Form:** Contains fields for Program (ATEST1-DAN), Project ID (20160550), Name, Location, Project Status, Project Type (Renovation), Category, Workflow Status (Draft), Currency (Dollar), Target Budget (\$140,000.00), Target Revenue (\$0.00), Target Duration (0 UOM), Target Start/Finish, Actual Start/Finish, Percent Complete (0.00%), and Scope.
- Navigator:** A list of project-related tasks and forms, including Planning, Engineering Forms, and Cost Management, with columns for 'Record Type' and 'Pending Approved' status.
- Right Panel:** Contains sections for 'Schedule', 'Budget', and 'Custom Fields'. A red circle highlights a blue tabbed menu with the following options: 'Planning and Project Request Form', 'Square Footage', 'Project Date Tracking', 'Project Status Updates', 'Project Ratings', 'LEED Information', 'Debt Funded', and 'Admin Use Only'. The 'Square Footage' tab is currently selected.

Additional project information

- Additional tabs to gather project information
- Project status updates

The screenshot displays the PMWeb software interface. The left sidebar shows a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main content area is titled 'Project Center' and shows details for a project named 'Connie Test1 *DO NOT DELETE*'. The project details include Program (ATEST1-DAN), Project ID (20160050), Name, Location, Project Status, Project Type (Renovation), Category, Workflow Status (Draft), Currency (Dollar), Target Budget (\$140,000.00), Target Revenue (\$0.00), Target Duration (0 UOM), Target Start/Finish, Actual Start/Finish, Percent Complete (0.00%), and Scope. The 'Project Center' has several tabs: Controls, Executive Report, Over/Under Budget, Another report!, Dashboard, Project Center, Portfolio View, and Calendar. The 'Project Center' tab is active, and a red circle highlights the 'Project Status Updates' tab within the 'Project Center' sub-section. Other tabs visible in the red circle include 'Planning and Project Request Form', 'Square Footage', 'Project Date Tracking', 'Project Ratings', 'LEED Information', 'Debt Funded', and 'Admin Use Only'. The bottom of the interface shows a table with columns for Spec, UOM, Data, and Notes, and a 'Total Project Budget' of \$0.00.

Additional project information

- Additional tabs to gather project information
- Project ratings
- Debt funded projects

Planning and Project Request Form		Square Footage					
Project Date Tracking		Project Status Updates		Project Ratings			
LEED Information		Debt Funded		Admin Use Only			
Edit							
Spec		UOM		Data		Notes	
Debt Funded				<input checked="" type="checkbox"/>			

Planning and Project Request Form		Square Footage					
Project Date Tracking		Project Status Updates		Project Ratings			
LEED Information		Debt Funded		Admin Use Only			
Edit							
Spec		UOM		Data		Notes	
Rate the Contractors Performance (1-5)							
Rate the CMs Performance (if applicable) (1-5)							
Rate the A/Es Performance (if applicable) (1-5)							
Rate the Overall Project Quality (1-5)							

Alternate project record navigation

- Specifications tab on project record

The screenshot displays the PMweb software interface. The top navigation bar includes the PMweb logo and a menu icon. The main content area is titled "Portfolio > Lists > Projects" and shows a project record for "Danforth Project Lifecycle testing". The record details include Program (ATEST1-DAN), Project ID (TESTDAN3), Name (** Danforth Project Lifecycle testing templa), Location (0001 - North Medical Building), Project Status (Draft), Project Type, Category, Workflow Status, Revision (0), and Date (Mar-21-2016). The Currency is set to Dollar (United States of America). The Project WBS is "Select Program WBS". The Target Budget is \$0.00, and the Project Account Amount is \$0.00. The Target Duration is 0 UCM, and the Target Start and Target Finish dates are empty. The Scope is empty.

The "Specifications" tab is selected, and the "Custom Fields" section is visible. The fields include:

Field Name	UCM	Data	Notes
Submission Date of Planning Project Request Form			
Requestor			
Department			
Requester's Manager			
Existing Location			
Chair			
Contact Name			
Check if Contact is Same as Requester			<input type="checkbox"/>
What is Being Requested			
Description of Need			
Need Driver			
If need driver is Other, describe			
Who is Work Being Performed For			
Anticipated Occupancy Start Date			
Department Number			
Date Assigned to Planner or PM			

Specifications tab

Additional tabs

Link assets: Building, floor, spaces (room)

- Ensure location field contains building information
- Link floor and room information to the project

The screenshot displays the PMWeb software interface. The main window shows project details for 'Danforth Project Lifecycle testing'. The 'Location' field is populated with '0001 - North Medical Building'. The 'Details' tab is active, showing address and contact information. A 'Select Assets' dialog box is open, showing a table of assets with columns for Suite, Location, Building, Floor, and Space. A red circle highlights the 'Save' button in the dialog. Blue arrows point to various elements: 'Location field complete' points to the location field, 'Details tab' points to the 'Details' tab, 'Select link asset' points to the 'Select Assets' dialog, and 'Drag/drop floor/room info and save' points to the 'Save' button.

Location field complete

Details tab

Select link asset

Drag/drop floor/room info and save

6/20/2016

Linked asset information

- Once linked, floor and room info is saved on the project record

The screenshot displays the PMWeb software interface. The top navigation bar shows "Portfolio > Lists > Projects". The main content area is titled "Danforth Project Lifecycle testing" and contains various form fields for project details. A table at the bottom, titled "Linked Asset(s)", is circled in red and contains the following data:

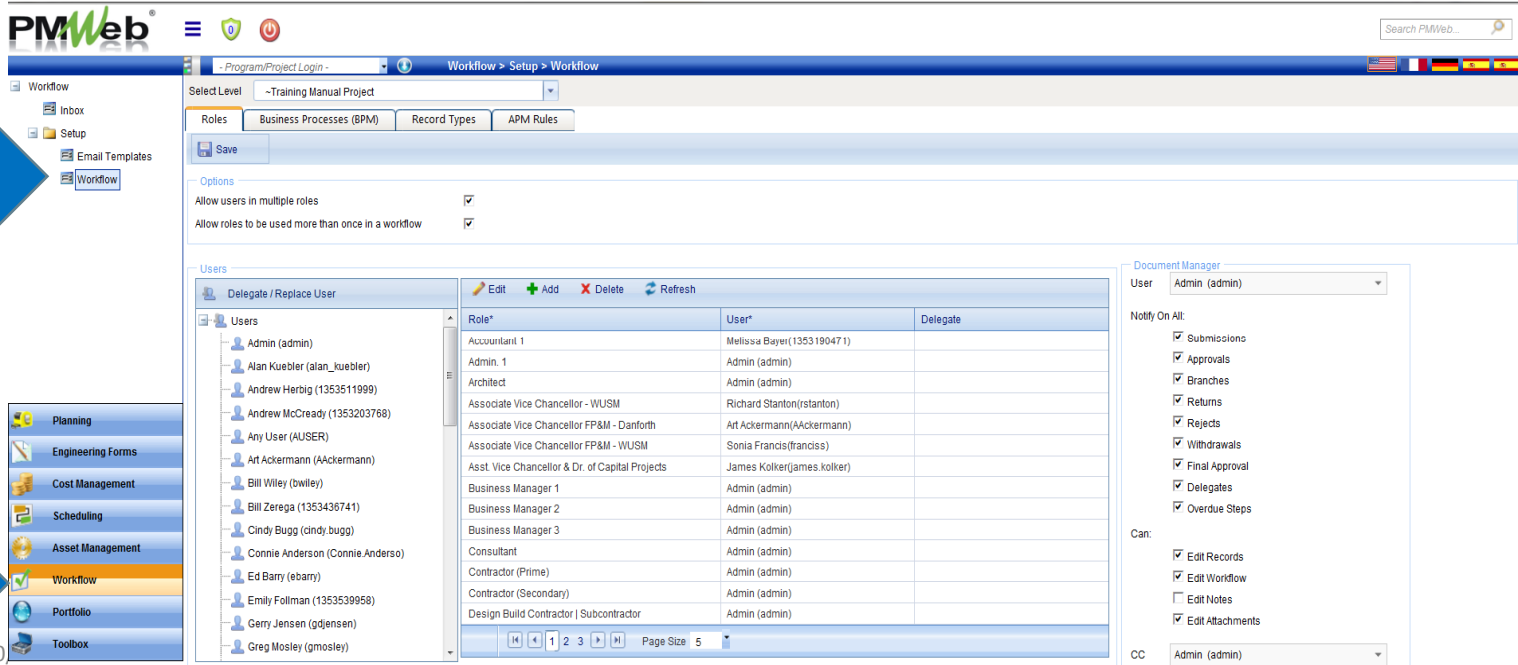
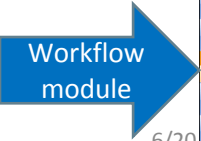
Suite	Location	Building	Floor	Space
	North Medical Building	1 - North Medical Bldg	1 - 1	1001 - 1001
	North Medical Building	1 - North Medical Bldg	1 - 1	1002 - 1002

PMWeb[®] Training

Workflow Role Assignment

Workflow role assignment

- Navigate to Workflow Module > Workflow sub-category



The screenshot shows the PMWeb interface for role assignment. The left sidebar has 'Workflow' selected. The main content area shows a table of users and roles. The table has columns for 'Role*', 'User*', and 'Delegate'. The 'Users' list on the left includes Admin (admin), Alan Kuebler (alan_kuebler), Andrew Herbig (1353511999), Andrew McCreedy (1353203768), Any User (AUSER), Art Ackermann (Aackermann), Bill Wiley (bwiley), Bill Zerega (1353436741), Cindy Bugg (cindy.bugg), Connie Anderson (Connie Anderso), Ed Barry (ebarry), Emily Follman (1353539958), Gerry Jensen (gdjensen), and Greg Mosley (gmosley).

Role*	User*	Delegate
Accountant 1	Melissa Bayer(1353190471)	
Admin. 1	Admin (admin)	
Architect	Admin (admin)	
Associate Vice Chancellor - WUSM	Richard Stanton(stanton)	
Associate Vice Chancellor FP&M - Danforth	Art Ackermann(Aackermann)	
Associate Vice Chancellor FP&M - WUSM	Sonia Francis(francis)	
Asst. Vice Chancellor & Dr. of Capital Projects	James Kolker(james.kolker)	
Business Manager 1	Admin (admin)	
Business Manager 2	Admin (admin)	
Business Manager 3	Admin (admin)	
Consultant	Admin (admin)	
Contractor (Prime)	Admin (admin)	
Contractor (Secondary)	Admin (admin)	
Design Build Contractor Subcontractor	Admin (admin)	

Workflow role assignment

- Select your project in the “Program/Project Login” field and in the field “Select Level”

The screenshot displays the PMWeb interface for workflow role assignment. The top navigation bar includes the PMWeb logo, a search bar, and a language selector. The main content area is titled "Workflow > Setup > Workflow" and features a "Select Level" dropdown menu set to "-Training Manual Project". Below this, there are tabs for "Roles", "Business Processes (BPM)", "Record Types", and "APM Rules". The "Roles" tab is active, showing a list of roles and their assigned users. A table with columns "Role*", "User*", and "Delegate" lists various roles such as "Accountant 1", "Admin 1", "Architect", and "Business Manager 1-3". A left sidebar contains a menu with items like "Planning", "Engineering Forms", "Cost Management", "Scheduling", "Asset Management", "Workflow" (highlighted with a red circle), "Portfolio", and "Toolbox". A "Document Manager" panel on the right shows a "User" dropdown set to "Admin (admin)" and a "Notify On All" section with checkboxes for "Submissions", "Approvals", "Branches", "Returns", "Rejects", "Withdrawals", "Final Approval", "Delegates", and "Overdue Steps".

Select project

Select project

Role*	User*	Delegate
Accountant 1	Melissa Bayer(1353190471)	
Admin 1	Admin (admin)	
Architect	Admin (admin)	
Associate Vice Chancellor - WUSM	Richard Stanton(stanton)	
Associate Vice Chancellor FP&M - Danforth	Art Ackermann(Ackermann)	
Associate Vice Chancellor FP&M - WUSM	Sonia Francis(francis)	
Asst. Vice Chancellor & Dr. of Capital Projects	James Kolker(james.kolker)	
Business Manager 1	Admin (admin)	
Business Manager 2	Admin (admin)	
Business Manager 3	Admin (admin)	
Consultant	Admin (admin)	
Contractor (Prime)	Admin (admin)	
Contractor (Secondary)	Admin (admin)	
Design Build Contractor Subcontractor	Admin (admin)	

6/20

View Workflow Roles

- Expand the page size to 250 so you can view all roles on one page

The screenshot shows the PMWeb interface for configuring workflow roles. The 'Roles' tab is active, and the 'Users' table is displayed. The 'Page Size' dropdown is highlighted with a red circle, indicating the current page size is 5. The interface includes a navigation menu on the left, a search bar at the top right, and a 'Document Manager' section on the right.

Role*	User*	Delegate
Accountant 1	Melissa Bayer(1363190471)	
Admin 1	Admin (admin)	
Architect	Admin (admin)	
Associate Vice Chancellor - WUSM	Richard Stanton(rstanton)	
Associate Vice Chancellor FP&M - Danforth	Art Ackermann(AAckermann)	
Associate Vice Chancellor FP&M - WUSM	Sonia Francis(francis)	
Asst. Vice Chancellor & Dr. of Capital Projects	James Kolker(james.kolker)	
Business Manager 1	Admin (admin)	
Business Manager 2	Admin (admin)	
Business Manager 3	Admin (admin)	
Consultant	Admin (admin)	
Contractor (Prime)	Admin (admin)	
Contractor (Subcontractor)	Admin (admin)	

View Workflow Roles

- Workflow roles shows an exhaustive list of all roles involved in all workflows.
- As a reminder, the modules that utilize workflow are:
 - Budgets (Resolution)
 - Budget Requests (Resolution Increase)
 - Commitments
 - Commitment Change Orders
 - Online Change Requests
 - Miscellaneous Invoices
 - Progress Invoices
 - Vendor Prequalification Approvals
 - Project Closeout

View Workflow Roles

- Any role that is assigned to the user “Admin” will need to have the identified user assigned to that role. Select Save once all roles have been assigned.

The screenshot shows the PMWeb interface for configuring workflow roles. The 'Save' button is highlighted with a red circle. Below it, a table lists roles and the users assigned to them. The 'Admin (admin)' user is assigned to multiple roles, which is also circled in red.

Role*	User*	Delegate
Accountant 1	Melissa @ayer(1262190471)	
Admin_1	Admin (admin)	
Architect	Admin (admin)	
Associate Vice Chancellor - WUSM	Richard Stanton(rstanton)	
Associate Vice Chancellor FPM - Danforth	Art Ackermann(Ackermann)	
Associate Vice Chancellor FPM - WUSM	Sonia Francis(francis)	
Asst. Vice Chancellor & Dr. of Capital Projects	James Kolker(james.kolker)	
Business Manager 1	Admin (admin)	
Business Manager 2	Admin (admin)	
Business Manager 3	Admin (admin)	
Contractor (Prime)	Admin (admin)	
Contractor (Secondary)	Admin (admin)	
Contractor Build Contractor Subcontractor	Admin (admin)	

Vendor roles (contractor, architect, engineer)

- Any vendor role is to be assigned to the project PM. This will allow the PM to delegate the workflow step to the correct vendor signatory. (Commitment)

The screenshot shows the CPMWeb interface for configuring workflow roles. The 'Save' button is circled in red. Below it, there are checkboxes for 'Allow roles to be used in multiple roles' and 'Allow roles to be used more than once in a workflow', both checked. The main area is a 'Users' table with columns for 'Role*', 'User*', and 'Delegate'. The 'Contractor (Prime)' role is circled in red, and its assigned user is also circled in red.

Role*	User*	Delegate
Accountant 1	Malissa @ayer(1262190471)	
Admin_1	Admin (admin)	
Architect	Admin (admin)	
Associate Vice Chancellor - WUGM	Richard Stanton(rstanton)	
Associate Vice Chancellor FP&M - Danforth	Art Ackermann(Ackermann)	
Associate Vice Chancellor FP&M - WUGM	Sonia Francois(franoiss)	
Asst Vice Chancellor & Dr. of Capital Projects	James Kolker(james.kolker)	
Business Manager 1	Admin (admin)	
Business Manager 2	Admin (admin)	
Business Manager 3	Admin (admin)	
Contractor (Prime)	Admin (admin)	
Contractor (Secondary)	Admin (admin)	
Build Contractor Subcontractor	Admin (admin)	

The logo for PMWeb, featuring the letters 'PM' in a bold, black, sans-serif font, followed by a stylized green 'W' that resembles a wave or a graph line, and the letters 'eb' in a smaller, black, sans-serif font. A registered trademark symbol (®) is located to the upper right of the 'b'. The entire logo is set against a white background with a subtle reflection effect below it.

PMWeb[®] Training

Forecasts

Add Forecasts

- Two ways to navigate to Forecasts module
 - Cost Management > Forecast Records sub-category

PMWeb

- Program/Project Login - Cost Management > Budgets > Forecasts

Cost Management

- Budgets
 - Budgets
 - Cost Codes
 - Cost Ledgers
 - Forecasts**
 - Cost Worksheets
 - Define Worksheets
 - Budget Requests
- Contracts
 - Master Commitments
 - Commitments
- Change Management

Planning

Engineering Forms

Cost Management

Scheduling

Asset Management

Drag a column header and drop it here to group by that column

Programs *All* Projects *All* + Add X Delete Refresh Layouts

Project Name	Project #	Record #	Description	Workflow Status	Reference	Period	Revision #	Revision Date
The Lofts Phase II - Planning	20160028	000001		Draft			0	Mar-31-2016
The Lofts Phase II - Planning	20160028	000002	RJL Forecast Test	Draft			0	Apr-25-2016
Golf Trip Planning	2014615XGLO	000001		Draft			0	Apr-01-2016
Moyer Cafe	2014615XGMA1	000001	Test Forecast	Draft		FY17 Jan	0	Apr-25-2016
16012 Dr. Dubberke Lab Re	2014615	000001	April 2016 Forecast	Approved			0	Apr-13-2016
16012 Dr. Dubberke Lab Re	2014615	000002	Melissa's Test	Draft			0	May-13-2016
16012 Dr. Dubberke Lab Re	2014615	000003	Forecast for May 2016	Draft			0	May-13-2016
16012 Dr. Dubberke Lab Re	2014615	000004	Forecast for May 2016	Approved			0	May-13-2016
Danforth University Center 1	2013907	000001	Test for cost worksheet	Approved			0	May-12-2016
Danforth University Center 1	2013907	000002		Draft			0	May-12-2016
Danforth University Center 1	2013907	000003	Period for Forecast	Approved			0	May-13-2016
RJL Main Test Project (Base	2015605	000001		Draft			0	Apr-25-2016
Golf Course Annual Mainten	170019	000001		Draft			0	May-13-2016

Page Size 20

Add Forecasts

- Two ways to navigate to Forecasts module
 - Project Center > Select Forecasts hyperlink

The screenshot displays the PMWeb software interface. The breadcrumb navigation at the top reads "Cost Management > Budgets > Forecasts". The left sidebar shows a tree view with "Cost Management" expanded, and "Forecasts" highlighted in blue. The main content area is divided into several sections:

- Controls:** Includes fields for Currency (Dollar), Target Budget (\$50,000.00), Target Revenue (\$0.00), Target Duration (0 UOM), Target Start/Finish (Apr-11-2016), Actual Start/Finish, Percent Complete (0.00%), and Scope.
- Engineering Forms:** A table listing various record types and their counts in Pending and Approved states.
- Cost Management:** A table listing record types and their counts in Pending and Approved states.
- Project Information:** A summary table showing Project Date Tracking, Project Status Updates, LEED Information, Debt Funded, and Admin Use Only.

A red circle highlights the "Forecasts" entry in the "Cost Management" table, which shows 1 Pending and 0 Approved records.

Record Type	Pending	Approved
A/P Payments	0	0
Budget Requests	1	1
Budgets	0	1
Commitment COs	0	0
Commitments	1	4
Cost Codes	0	0
Forecasts	1	0
Funding Records	1	2

Project Date Tracking	Project Status Updates	Project Information
LEED Information	Debt Funded	Admin Use Only
Edit		
Spec	UOM	Data
Does Project Include a Move		
Weekly Status Update		
Plan for Next Week		
Issues and Risks Identified		
Total Project Budget		\$0.00
Project Type		New Construction
Project Category		Public Real

Add Forecasts

- Add a new forecast record or select your project from the board

The screenshot shows the PMWeb application interface. The left sidebar contains a navigation menu with categories like 'Cost Management', 'Budgets', 'Contracts', and 'Change Management'. The 'Forecasts' option is selected. The main content area displays a table of forecast records. The table has columns for Project Name, Project #, Record #, Description, Approval Status, Reference, Period, Revision #, and Revision Date. A single record is visible for 'Moyer Cafe'. Above the table, there are controls for 'Programs' (set to '*All*') and 'Projects' (set to 'Moyer Cafe'). A red circle highlights the '+ Add' button, and another red circle highlights the 'Moyer Cafe' text in the 'Projects' dropdown.

Project Name	Project #	Record #	Description	Approval Status	Reference	Period	Revision #	Revision Date
Moyer Cafe	2014615XGMA1	000001	Test Forecast	Draft		FY17 Jan	0	Apr-25-2016

Add Forecasts

- Select the Project name from the dropdown
- Save

The screenshot shows the PMWeb application interface. The left sidebar contains a navigation menu with categories like 'Cost Management', 'Contracts', and 'Change Management'. The 'Forecasts' option is selected. The main window displays a form for adding forecasts. The 'Project' dropdown is set to 'Moyer Cafe'. The 'Save' icon in the toolbar is highlighted with a red circle. Below the form, there is a table with columns for Budget, Anticipated Budget- PV, Anticipated Cost, Anticipated Variance, Actual Cost, and Budget.

Budget	Anticipated Budget- PV	Anticipated Cost	Anticipated Variance	Actual Cost	Budget
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Add Forecasts

- Enter header details
 1. **Record #** = Field will auto populate with the next number in the sequence based upon the number of forecasts are associated to a project. EXAMPLE: If it's the first forecast being generated, the number will be 1, the second will be 2.
 2. **Description** = Enter the date of the period of the forecast. EXAMPLE: May 2016
 3. **To this period** = DO NOT make a selection here

The screenshot displays the PMWeb software interface for adding forecasts. The left sidebar shows a navigation menu with 'Forecasts' highlighted. The main form area contains the following fields and options:

- Project***: Moyor Cafe
- Record #***: 002
- Description**: (empty)
- To this period**: (dropdown menu)
- Reference**: (empty)
- Revision**: (empty) **Date**: (empty)
- Workflow Status**: Draft
- Options**:
 - Include pending budget records
 - Include pending cost records
 - Include pending actual cost records

Below the form is a table with the following columns: Level 1, Cost Code, Description, Total Budget, Anticipated Budget- PV, Anticipated Cost, Anticipated Variance, Actual Cost, and Budget. The table currently shows 'No records to display.' and a total of \$0.00 for each column.

Add Forecasts

- Enter header details
 4. **Reference** = Leave NULL
 5. **Include pending budget records** = Leave UN-checked
 6. **Include pending cost records** = CHECK the box
 7. **Include pending actual cost records** = CHECK the box
- Save

The screenshot displays the PMWeb interface for adding forecasts. The left sidebar shows the 'Cost Management' tree with 'Forecasts' selected. The main form is titled 'Add Forecast' and includes the following fields and options:

- Project*: Moyer Cafe
- Record #: 002
- Description: [Empty]
- To this period: [Dropdown]
- Reference: [Empty]
- Revision: [Empty] Date: [Empty]
- Workflow Status: Draft

The 'Options' section contains three checkboxes:

- Include pending budget records
- Include pending cost records
- Include pending actual cost records

The bottom of the screen shows a table with columns: Level 1, Cost Code, Description, Total Budget, Anticipated Budget- PV, Anticipated Cost, Anticipated Variance, Actual Cost, and Budget. The table currently displays 'No records to display.' and has values of \$0.00 for all budget-related columns.

Build Forecasts

- Select “add cost codes” and drag in cost codes
 - Note cost codes are structured differently than estimate
 - Save

The screenshot displays the PMWeb software interface. The main window is titled "Cost Codes" and shows a "Group tree at this level" with categories: 01 - Construction Costs, 02 - Professional Fees & Reimbursables, 03 - Owner Direct Costs, 04 - FF&E, 05 - Contingency, and 06 - Assessments (Danforth). The "Add Cost Codes" button is circled in red. The "Save and Close" button is also circled in red.

00052 - Moyer Cafe - May 2016

Project* Moyer Cafe

Record # 003

Description May 2016

To this period

Reference

Revision 0 Date May-25-2016

Workflow Status Draft

Details Specifications Notes At

Drag a column header and drop it here to group by that

Ed Add Cost Codes X Delete

Level 1

01 - Construction Cost 01-001-001 00

Page Size 20

Created: May-25-2016 by 1353543093 - Maria Moyer of Washington University in St. Louis

Include Notes

Save to record | Save and Close | Close

Build Forecasts

- The budget that you built will be pulled into the forecast
- Other calculations have also been added to line items

The screenshot displays the PMWeb interface for 'Cost Management > Budgets > Forecasts'. The main window shows details for '00051 - Moyer Cafe - May 2016'. The 'Options' section includes checkboxes for 'Include pending budget records', 'Include pending cost records', and 'Include pending actual cost records'. The 'Earned Value Chart' section is also visible. Below the options is a table with the following data:

Level 1	Cost Code	Description	Total Budget	Anticipated Cost	Forecast To Complete	Forecast At Completion	Forecast Variance	Notes
01 - Construction Cos	01-001-001 00 00	General Requirements	\$50,000.00	\$11,000.00	\$0.00	\$11,000.00	\$39,000.00	
			\$50,000.00	\$11,000.00	\$0.00	\$11,000.00	\$39,000.00	

Forecast Definitions

- 1. Anticipated Costs** = Includes all approved Commitments, approved Change Orders and approved non-commitment costs (Misc Invoices).
 - If in the forecast header, "Include Pending Cost Records" and "Include Pending Actual Cost" are selected, then Anticipated Cost will also include pending Commitments and pending Commitment Change Orders (does not include Online Change Requests (PCO's))
 - NOTE: This value does NOT include any payments that are associated with Journals or Credit Memos
- 2. Forecast to Complete** = Any set asides that need to be accounted for

The screenshot displays the PMWeb software interface. The main window shows the 'Cost Management > Budgets > Forecasts' section. The project is '00051 - Moyer Cafe - May 2016'. The record number is '002' and the description is 'May 2016'. The revision is '0' and the date is 'May-25-2016'. The workflow status is 'Draft'. The 'Options' section is checked for 'Include pending budget records', 'Include pending cost records', and 'Include pending actual cost records'. The 'Earned Value Chart' is visible. Below the form is a table with columns: Level 1, Cost Code, Description, Total Budget, Anticipated Cost, Forecast To Complete, Forecast At Completion, Forecast Variance, and Notes. The table contains one row of data for '01 - Construction Cos' with a total budget of \$50,000.00, an anticipated cost of \$11,000.00, a forecast to complete of \$0.00, a forecast at completion of \$11,000.00, and a forecast variance of \$39,000.00. Red circles with numbers 1 through 4 are placed over the Anticipated Cost, Forecast To Complete, Forecast At Completion, and Forecast Variance columns respectively. The interface also shows a left-hand navigation menu with 'Forecasts' selected, and a top navigation bar with 'Program/Project Login' and a search box.

Level 1	Cost Code	Description	Total Budget	Anticipated Cost	Forecast To Complete	Forecast At Completion	Forecast Variance	Notes
01 - Construction Cos	01-001-001 00 00	General Requirements	\$50,000.00	\$11,000.00	\$0.00	\$11,000.00	\$39,000.00	
			\$50,000.00	\$11,000.00	\$0.00	\$11,000.00	\$39,000.00	

Forecast Definitions

3. Forecast at Completion = Anticipated Costs + Set Asides

4. Forecast Variance = Total Budget – Anticipated Cost – Forecast To Complete/Set Asides

The screenshot displays the PMWeb application interface. The left sidebar shows a navigation tree with 'Forecasts' selected under 'Budgets'. The main window shows the 'Forecasts' page for '00051 - Moyer Cafe - May 2016'. The 'Details' tab is active, showing a table with the following data:

Level 1	Cost Code	Description	Total Budget	Anticipated Cost	Forecast To Complete	Forecast At Completion	Forecast Variance	Notes
01 - Construction Cos	01-001-001 00 00	General Requirements	\$50,000.00	\$11,000.00	\$0.00	\$11,000.00	\$39,000.00	
			\$50,000.00	\$11,000.00	\$0.00	\$11,000.00	\$39,000.00	

Red circles highlight the values: 1 in the Anticipated Cost column, 2 in the Forecast To Complete column, 3 in the Forecast At Completion column, and 4 in the Forecast Variance column.

Build Forecasts

- Enter set-asides in “Forecast to Complete” column
 - Use shortcut: select top row; shift; bottom row; edit
- Update records
 - Forecast At Completion and Forecast Variance will auto-calculate

PMWeb®

Cost Management > Budgets > Forecasts

00051 - Moyer Cafe - May 2016

Project*: Moyer Cafe
Record #: 002
Description: May 2016
To this period: [dropdown]
Reference: [dropdown]
Revision: 0 Date: May-25-2016
Workflow Status: Draft

Options:
 Include pending budget records
 Include pending cost records
 Include pending actual cost records

Earned Value Chart

Details Specifications Notes Attachments Notifications

Drag a column header and drop it here to group by that column

Update Records Cancel

Level 1	Cost Code	Description	Total Budget	Anticipated Cost	Forecast To Complete	Forecast At Completion	Forecast Variance	Notes
01 - Construction Cos	01-001-001 00 00	General Requirements	\$50,000.00	\$11,000.00	\$10,000.00	\$21,000.00	\$39,000.00	
			\$50,000.00	\$11,000.00	\$0.00	\$11,000.00	\$39,000.00	

Complete Forecasts

- Save the record
- Select “Post to Cost Ledger” icon, then save again
- The forecast is now complete

The screenshot shows the PMWeb software interface. The breadcrumb navigation is 'Cost Management > Budgets > Forecasts'. The main area displays a form for '00051 - Moyer Cafe - May 2016'. The 'Post to Cost Ledger' icon (a document with a checkmark) is circled in red. The 'Save' icon (a floppy disk) is also circled in red. The 'Options' section includes checkboxes for 'Include pending budget records', 'Include pending cost records', and 'Include pending actual cost records'. Below the form is a table with columns: Level 1, Cost Code, Description, Total Budget, Anticipated Cost, Forecast To Complete, Forecast At Completion, Forecast Variance, and Notes.

Level 1	Cost Code	Description	Total Budget	Anticipated Cost	Forecast To Complete	Forecast At Completion	Forecast Variance	Notes
01 - Construction Co	01-001-001 00 00	General Requirements	\$50,000.00	\$11,000.00	\$10,000.00	\$21,000.00	\$29,000.00	
			\$50,000.00	\$11,000.00	\$10,000.00	\$21,000.00	\$29,000.00	

Subsequent Forecasts

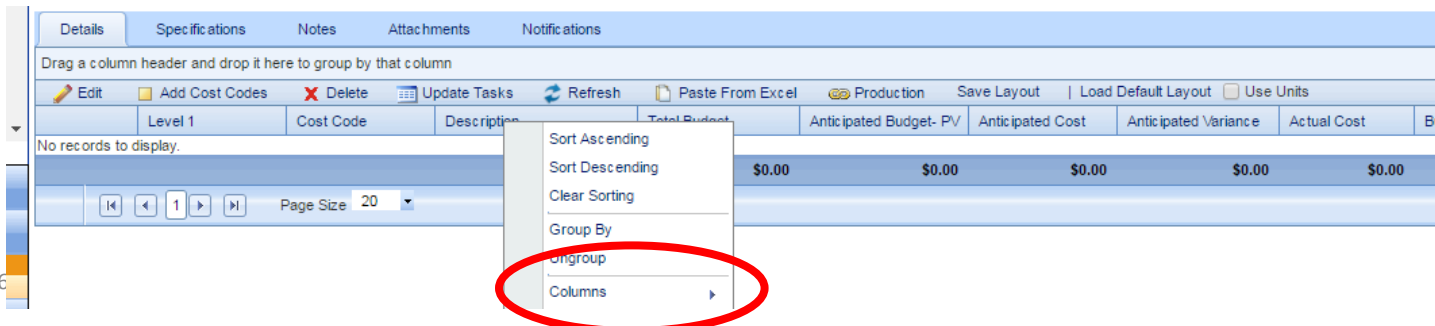
- Open original forecast, select “Unpost” icon
- Select “Copy”
 - This will copy details from the previous month’s forecast, add a new sequence number and all details

The screenshot shows the PMWeb interface for 'Cost Management > Budgets > Forecasts'. The main window displays details for '00051 - Moyer Cafe - May 2016'. The 'Unpost' icon and the 'Copy' icon are circled in red. The interface includes a navigation menu on the left, a search bar at the top right, and a data table at the bottom.

Level 1	Cost Code	Description	Total Budget	Anticipated Cost	Forecast To Complete	Forecast At Completion	Forecast Variance	Notes
01 - Construction Co	01-001-001 00 00	General Requirements	\$50,000.00	\$11,000.00	\$10,000.00	\$21,000.00	\$29,000.00	
			\$50,000.00	\$11,000.00	\$10,000.00	\$21,000.00	\$29,000.00	

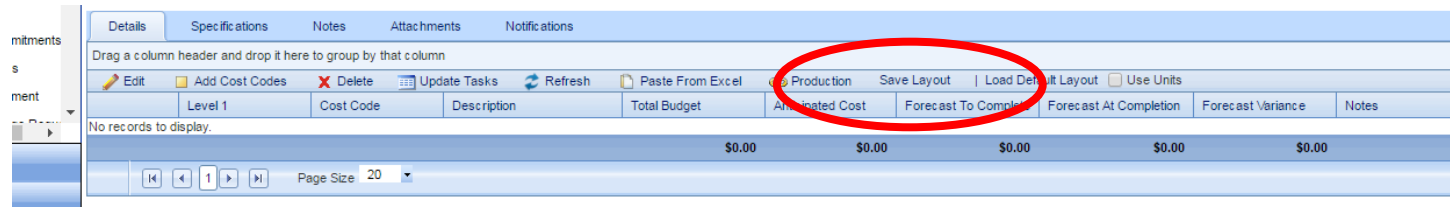
Column Cleanup for Forecasts

- It is helpful to hide some of the many columns for ease of use
 - To hide a column, hover over one of the column headers, right click and select the “columns” arrow; select/deselect column choices as needed
- Hide columns:
 - Anticipated Budget – PV, Anticipated Variance, Actual Cost, Budget Minus Actuals, UOM, Quantity to Complete, Unit Cost, Period, Task, Quantity Completed, % Complete, Start, Finish, Curve, EV, CV, CPI, SV, SPI, Line Item Contingency



Column Cleanup for Forecasts

- Once columns have been hidden, select “Save Layout”
- The details tab is now customized and will default to this view for any new forecast



The logo for PMWeb, featuring the letters 'PM' in black, a green stylized 'W' that overlaps the 'M', and 'eb' in black. A registered trademark symbol (®) is located to the upper right of the 'b'. The logo is set against a white background with a subtle reflection effect below it.

PMWeb® Training

Scheduling

Scheduling

- Two ways to navigate to Scheduling module
 - Scheduling > Schedules sub-category

The screenshot displays the PMWeb application interface. On the left, a navigation menu lists various modules: Scheduling, PPM, Project Codes, Calendars, Resources Availability, Link Setup, Planning, Engineering Forms, Cost Management, and Scheduling. A blue arrow points from the 'Scheduling' menu item to the 'Schedules' sub-item. Another blue arrow points from the 'Scheduling' menu item to the 'Scheduling' module icon at the bottom of the menu.

The main content area shows the 'Scheduling > Schedules' page. It features a search bar with 'Programs' set to '*All*' and 'Projects' set to '*All*'. Below the search bar is a table with the following columns: Project Name, Project #, Record #, Workflow Status, Description, Category, and Type. The table contains four rows of data:

Project Name	Project #	Record #	Workflow Status	Description	Category	Type
South Building 4th Floor Cell Biology R	20160020	000148	Draft	Copy (1) of		
South Building 4th Floor Cell Biology R	20160020	000150	Draft			
The Lofts Phase II - Planning	20160028	000154	Draft			
Moyer Cafe	2014615XGMA1	000156	Draft			

At the bottom of the table, there are navigation controls including a 'Page Size' dropdown set to 20.

Scheduling

- Two ways to navigate to Scheduling module
 - Project Center > Select Schedules hyperlink

The screenshot displays the PMWeb Scheduling module interface. The left sidebar contains a navigation menu with the following items: Schedules, PPM, Project Codes, Calendars, Resources Availability, Link Setup, and another Link Setup. The main content area is titled 'Project Center' and shows details for a project named 'Moyer Cafe'. The project details include Program (ATEST1-WUSM), Project ID (2014615XGMA1), Name (Moyer Cafe), Location (0001 - North Medical Building), Project Status (Programming / Planning), Project Type (-- Select --), Category (-- Select --), Workflow Status (Draft), Currency (Dollar (United States of America)), Target Budget (\$120,000.00), Target Revenue (\$0.00), Target Duration (0 UOM), Target Start/Finish (Apr-11-2016), Actual Start/Finish, Percent Complete (0.00%), and Scope (This is a test to build a new cafe on...). The 'Navigator' section on the right lists various project management functions: Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, and Portfolio. The 'Scheduling' section contains a table with the following data:

Record Type	Pending	Approved
Schedules	1	0

A red circle highlights the 'Schedules' record in the table. The right sidebar contains sections for Schedule, Budget, and Custom Fields. The Budget section shows Target (\$120,000.00) and Anticipated Cost (\$97,000.00). The Custom Fields section includes buttons for Planning and Project Request Form, Square Footage, Project Date Tracking, Project Status Updates, LEED Information, Debt Funded, and Admin Use Only. The bottom right corner shows a table with columns for Spec, UOM, and Data.

Scheduling

- Add a new schedule record or select your project from the board

PMWeb

Scheduling > Schedules

Drag a column header and drop it here to group by that column

Programs: *All* Projects: *All* **+ Add** X Delete Refresh Layouts

Project Name	Project #	Record #	Workflow Status	Description	Category	Ty
South Building 4th Floor Cell Biology Rr	20160020	000148	Draft	Copy (1) of		
South Building 4th Floor Cell Biology Rr	20160020	000150	Draft			
The Lofts Phase II - Planning	20160028	000154	Draft			
Moyer Cafe	2014615XGMA1	000156	Draft			

Page Size: 20

Planning
Engineering Forms
Cost Management
Scheduling

Scheduling

- Select the project name
- Save

The screenshot displays the PMWeb Scheduling interface. The left sidebar contains a navigation menu with 'Scheduling' expanded, showing options like 'Schedules', 'PPM', 'Project Codes', 'Calendars', 'Resources Availability', 'Link Setup', and 'Link Setup'. The main content area shows a form for '000156 - Moyer Cafe-'. The 'Project*' dropdown is set to 'Moyer Cafe' and is circled in red. The 'Status Date' is also 'Moyer Cafe'. A 'Save' button (floppy disk icon) in the top toolbar is also circled in red. The 'Settings' panel on the right includes options for 'Link % Complete to Actual Costs', 'Link % Complete to Remaining Duration', and 'Show Columns Filter' (checked). The 'Actions' panel has buttons for 'Copy From Schedule', '% Complete From Timesheets', and 'Save as Baseline'. A table at the bottom shows project details for 'Feb-27-2016' with columns for '%C', 'TF', and task IDs '01' and '02'.

Task	%C	TF	01	02
Feb-27-2016	0%	0		

Scheduling

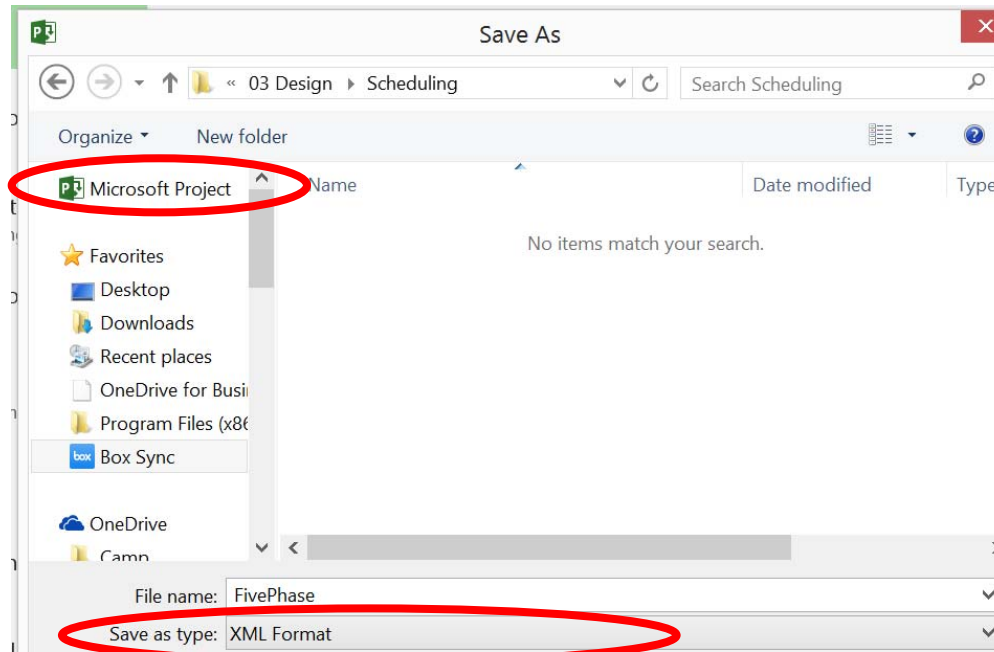
- Two ways to add tasks
 - Manually – select + to add, type detail, add date, save

The screenshot shows the PMWeb Scheduling interface. The top navigation bar includes the PMWeb logo, a menu icon, a shield icon, a power icon, and a search box. The main header displays the project name '000156 - Moyer Cafe-' and the current view 'Scheduling > Schedules'. The left sidebar contains navigation options: Schedules, PPM, Project Codes, Calendars, Resources Availability, Link Setup, and another Link Setup. The main content area is divided into several sections: a form for task details (Project, Status Date, Type, Workflow Status), a settings panel (Link % Complete to Actual Costs, Link % Complete to Remaining Duration, Show Columns Filter), and an actions panel (Copy From Schedule, % Complete From Timesheet, Save as Baseline). Below these is a toolbar with icons for Group by, Zoom to halves and months, and a table of tasks. A blue arrow labeled 'Save' points to the save icon in the toolbar. The table has columns for ID, Name, Start, Finish, %C, and TF. The data rows are:

ID	Name	Start	Finish	%C	TF
NaN		Feb-24-2016	Feb-27-2016	0%	0
5820	Sample task	Jun-01-2016	Jun-01-2016	0%	0
5821	Next task	Jun-02-2016	Jun-02-2016	0%	0

Scheduling

- Two ways to add tasks
 - Upload – save project plan as XML format file



Scheduling

- Select “link schedule” icon to open dialog box
- Select application type
- Browse and upload file. Save and exit.

The screenshot displays the PMWeb Scheduling interface. The main window shows the 'Schedules' section for 'Moyer Cafe'. A 'Link Schedule' dialog box is open, allowing the user to link an external file. The dialog box has a title bar with 'Save', 'Save & Exit', and 'Cancel' buttons. The 'Application' dropdown is set to 'MS Project'. The 'File name' field contains 'FivePhase.xml'. The 'Upload' button is highlighted. A blue arrow points to the 'Application' dropdown with the text 'Application type'. Red circles highlight the 'Link Schedule' icon in the top toolbar, the 'Save & Exit' button, the 'Xml file' label, and the 'Upload' button.

ID	Code
NaN	
5820	
5821	

Scheduling

- All of the line items from your project plan will be added to the schedule

The screenshot displays the PMWeb Scheduling interface. The main window shows the 'Project Schedule' for '000156 - Moyer Cafe'. The 'Details' tab is selected and highlighted with a red circle. The interface includes a navigation menu on the left with options like 'Schedules', 'PPM', 'Project Codes', 'Calendars', 'Resources Availability', 'Link Setup', and 'Link Setup'. The main area contains a form for project details (Project, Status Date, Type, Workflow) and a table of schedule items. The table has columns for ID, Code, Task, Start, Finish, %C, and TF. The 'Details' tab is circled in red.

ID	Code	Task	Start	Finish	%C	TF
NaN			Feb-24-2016	Feb-27-2016	0%	0
5820		Sample task	Jun-01-2016	Jun-01-2016	0%	0
5821		Next task	Jun-02-2016	Jun-02-2016	0%	0
5822	3	Program and Planning	Mar-29-2016	Mar-29-2016	0%	0
5823	20	Programming Complete	Mar-30-2016	Mar-30-2016	0%	0
5824	5	Design	Mar-31-2016	Mar-31-2016	0%	0
5825	19	Construction Pricing Approved	Apr-01-2016	Apr-01-2016	0%	0
5826	8	Construction	Apr-04-2016	Apr-04-2016	0%	0
5827	18	Substantial Completion	Apr-05-2016	Apr-05-2016	0%	0
5828	23	Pre-Occupancy Activities (FF&E, Move in, Cleaning)	Apr-06-2016	Apr-06-2016	0%	0
5829	25	Occupancy Date	Apr-07-2016	Apr-07-2016	0%	0

Scheduling

- You can view in details tab (previous slide) or linked schedule tab

The screenshot displays the PMWeb Scheduling interface for a project named 'Moyer Cafe'. The interface includes a navigation menu on the left, a top navigation bar, and a main content area. The 'Linked Schedule' tab is highlighted with a red circle. Below the tab, a table lists project activities with columns for ID, Code, Name, Start, Finish, Actual Start, Actual Finish, Remaining Duration, and Complete. The table shows 11 activities, all with 0.00% completion.

ID	Code	Name	Start	Finish	Actual Start	Actual Finish	Remaining Duration	Complete
5822	3	Program and Planning	Mar-29-2016	Mar-29-2016			1.00	0.00%
5823	20	Programming Complete	Mar-30-2016	Mar-30-2016			1.00	0.00%
5824	5	Design	Mar-31-2016	Mar-31-2016			1.00	0.00%
5825	19	Construction Pricing Approved	Apr-01-2016	Apr-01-2016			1.00	0.00%
5826	8	Construction	Apr-04-2016	Apr-04-2016			1.00	0.00%
5827	18	Substantial Completion	Apr-05-2016	Apr-05-2016			1.00	0.00%
5828	23	Pre-Occupancy Activities (FF&E, M	Apr-06-2016	Apr-06-2016			1.00	0.00%
5829	25	Occupancy Date	Apr-07-2016	Apr-07-2016			1.00	0.00%
5830	11	Closeout	Apr-08-2016	Apr-08-2016			1.00	0.00%
5831	17	Closed In Accounting	Apr-11-2016	Apr-11-2016			1.00	0.00%

The logo for PMWeb, featuring the letters 'PM' in black, a green stylized 'W' that overlaps the 'M', and 'eb' in black. A registered trademark symbol (®) is located to the upper right of the 'b'. The logo is set against a white background with a subtle reflection effect below it.

PMWeb® Training

Build Estimate

Build Estimate for a Project

- Two ways to navigate to Estimate module
 - Planning Module > Estimates sub-category

PMWeb

Planning > Estimates

Drag a column header and drop it here to group by that column

Programs *All* Projects *All* **+ Add** X Delete Refresh Layouts

Project Name	Project #	Record #	Description	Workflow Stat	UOM	Reference	Unit	Category	Revision #
KLL Pedestrian Walkway	KLL1234	000020	KLL Pedestrian Walkway Rep	Approved			1.00		0
KLL Pedestrian Walkway	KLL1234	000027	Revised Estimate	Draft			1.00		0
Maternity Bldg Ob/Gyn	2015576y	000052	Approved Budget	Approved			1.00		0
New Resolution Test (D	KMH 16056	000126	Eggnog	Approved			1.00		0
New Resolution Test (D	KMH 16056	000127	Eggnog Increase	Approved			1.00		0
New Resolution Test (D	KMH 16056	000129	estimate paste	Draft			1.00		0
New Resolution Test (D	KMH 16056	000130	fefe	Approved			1.00		0
East Bldg 3rd Floor Psyc	16055	000149	East 3 Psychiatry Reno - Inc	Draft	sf		1.00		0
For Testing Change Orc	TEMPINT06	000140	For Testing CO's. First Attem	Approved			1.00		0
For Testing Change Orc	TEMPINT06	000143	Delete	Draft			1.00		0
Sidewalk Repair 2015 Pl	16058	000145	budget	Approved			1.00		0
Justin 123015	TEMPINT08	000141	Program Estimate	Draft			1.00		0
Taylor Avenue Building	16060	000142	General Medical Sciences an	Withdrawn	sf		2,250.00		1
Taylor Avenue Building	16060	000146	General Medical Sciences an	Approved	sf		11,483.00		0
McDonnell Sci. basemen	16061	000144	originally this project included	Approved	sf	52-3425-85338	9,750.00		0
HHM FCUs	JAF004	000147	Budget Testing (Escape Roo	Approved	sf		70,000.00		0
HHM FCUs	JAF004	000148	Adding to the estimate (Escap	Approved			1.00		0
Forecast Test	16066	000150	Forecast Test Estimate	Approved			1.00		0
Forecast Test	16066	000158	estimate test	Approved			1.00		0

Build Estimate for a Project

- Two ways to navigate to Estimate module
 - Project Center > Select Estimates hyperlink

The screenshot displays the PMWeb software interface. The main window title is "Planning > Estimates". The user is logged in as Maria Moyer. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options such as Planning, Estimates (highlighted), Procurement, Online Bidding, Setup, Items, Formulas, Assemblies, Forms, Program of Requirement, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox.
- Project Center:** Shows details for the "Moyer Cafe" project. Fields include Program (ATEST1-WUSM), Project ID* (2014615XGMA1), Name* (Moyer Cafe), Location (WUSM - ** Washington University), Project Status (Draft), Project Type (New Construction), Category, Workflow Status, Currency (Dollar (United States of America)), Target Budget (\$0.00), Target Revenue (\$0.00), Target Duration, Target Start/Finish, Actual Start/Finish, Percent Complete (0.00%), and Scope.
- Navigator:** A tree view showing project components. The "Estimates" item is circled in red. Other items include Planning, Online Bidding, Procurement, Program of Requirements (PM/POR), Engineering Forms, Record Type, Correspondence, Drawing Lists, Meeting Minutes, Online Submittals, Punch Lists, RFI's, Safety Forms, Submittal Sets, Submittal Items, Transmittals, and Emergency Form.
- Table:** A table titled "Planning and Project Request Form" with columns for "Project Date Tracking" and "Admin Use Only". The table includes rows for "Spec", "Does Project Include a Move", "Weekly Status Update", "Plan for Next Week", "Issues and Risks Identified", and "Total Project Budget" (showing \$0.00).

Create new estimate

- You will be brought to a new estimate record

The screenshot shows the PMWeb software interface. The top navigation bar includes the PMWeb logo and a menu icon. The main area is titled 'Planning > Estimates'. On the left, a sidebar lists various modules: Planning, Estimates, Procurement, Online Bidding, Setup, Items, Formulas, Assemblies, Forms, and Program of Requirement. The main content area contains a form for creating a new estimate record. The form includes fields for Project, Revision, Description, Category, Reference, and Workflow Status. There are also dropdown menus for Estimate unit of measure, Estimate units, Cost Unit, and Price Unit. Below the form is a table with columns: Line #, Assembly, Item, Resource, Resource Type, BIM ID, Description, Mfr. #, Manufacturer, Phase, Cost Code, Type, Bid Category, and UOM. The table is currently empty, displaying 'No records to display.' The bottom of the interface shows a toolbar with navigation icons and a page size dropdown set to 20.

Create new estimate

- Select your project from the list

The screenshot shows the PMWeb software interface. A blue arrow points to the 'Estimates' button in the left sidebar, with the text 'Select project' next to it. The main window displays a form for creating a new estimate. The 'Project' dropdown is set to 'mvm'. The 'Description' field contains 'MVM Test Script Development'. The 'Estimate unit of measure' dropdown is set to '-- Select --'. The 'Unit' field is set to '1'. The 'Jnit' field is set to '\$0.00'. The 'Jnit' field is set to '\$0.00'. The interface includes a top navigation bar, a left sidebar, and a main content area with a table for items.

Resource Type	BIM ID	Description	Mfr. #	Manufacturer	Phase

Create new estimate

- Enter Estimate Description (only required field) and save the record

The screenshot shows the PMWeb software interface. The left sidebar contains a navigation menu with the following items: Planning, Initiatives, Planning Worksheet, Estimates (highlighted), Procurement, Online Bidding, Setup, Items, Formulas, Assemblies, and Forms. The main window displays the 'Estimates' form. The 'Project*' field is set to 'MVM Test Script Development'. The 'Description*' field is set to 'Estimate #2'. The 'Estimate unit of measure' is set to '-- Select --'. The 'Estimate units' is set to '1'. The 'Cost/Unit' is set to '\$0.00' and the 'Price/Unit' is set to '\$0.00'. The 'Workflow Status' is set to 'Draft'. The form has tabs for 'Details', 'Adjustments', 'Specifications', 'Notes', 'Attachments', and 'Notifications'. Below the form is a table with columns: Line #, Assembly, Item, Resource, Resource Type, BIM ID, Description, Mfr. #, Manufacturer, and Phase. The table is currently empty, displaying 'No records to display.'. The bottom of the interface shows a toolbar with navigation buttons and a 'Page Size' dropdown set to '20'.

Create new estimate

- Two ways to add cost codes and unit prices to your estimate
 - Details tab > Add Items

The screenshot displays the PMWeb software interface. The left sidebar contains a navigation menu with the following items: Planning, Estimates, Procurement, Online Bidding, Setup, Forms, and Program of Requirement. The main window shows the 'Estimates' section for a project named 'Moyer Cafe'. The 'Details' tab is selected, and the 'Add Items' button is highlighted with a red circle. A blue arrow points from the 'Details tab' label in the sidebar to the 'Add Items' button. The interface also shows a table with columns for Line #, Assembly, Item, Resource, Resource Type, DIM ID, Description, Mfr. #, Manufacturer, Phase, Cost Code, Type, Did Category, and UOM. The table currently contains no records.

Create new estimate

- From the “items” window, drag and drop the relevant cost codes into your estimate. Save.

The screenshot displays the PMWeb software interface. The main window is titled 'Items' and contains a table of cost codes. A red circle highlights the 'Save' button in the top-left corner of the window. The table lists various items with their descriptions, phases, cost codes, types, quantities, and unit costs.

#	Item	Description	Phase	Cost Code	Type	Quantity	Unit Cost
1	000046	000 00 00 Procurement		01-000-000 00 00		1	0.00
1	000050	001 00 00 General Requirements		01-001-001 00 00		1	0.00
1	000052	002 00 00 Existing Con		01-002-002 00 00		1	0.00
1	000041	003 00 00 Concrete		01-003-003 00 00		1	0.00
1	000056	004 00 00 Masonry		01-004-004 00 00		1	0.00
1	000063	005 00 00 Metals		01-005-005 00 00		1	0.00
1	000066	006 00 00 Woods, Plac		01-006-006 00 00		1	0.00
1	000074	007 00 00 Thermal and Moisture Protection		01-007-007 00 00		1	0.00
1	000092	008 00 00 Openings		01-008-008 00 00		3	0.00
1	000101	009 00 00 Finishes		01-009-009 00 00		1	0.00
1	000119	010 00 00 Specialties		01-010-010 00 00		1	0.00
1	000126	011 00 00 Equipment		01-011-011 00 00		1	0.00
1	000130	012 00 00 Furnishings		01-012-012 00 00		1	0.00

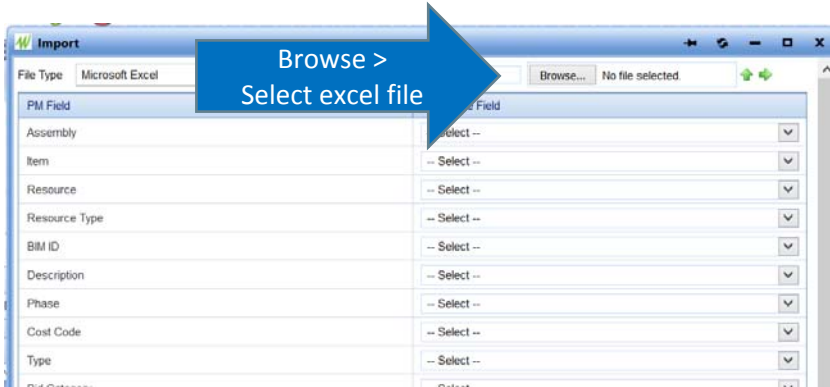
Create new estimate

- Two ways to add cost codes and unit prices to your estimate
 - Complete the estimate in an Excel template and upload

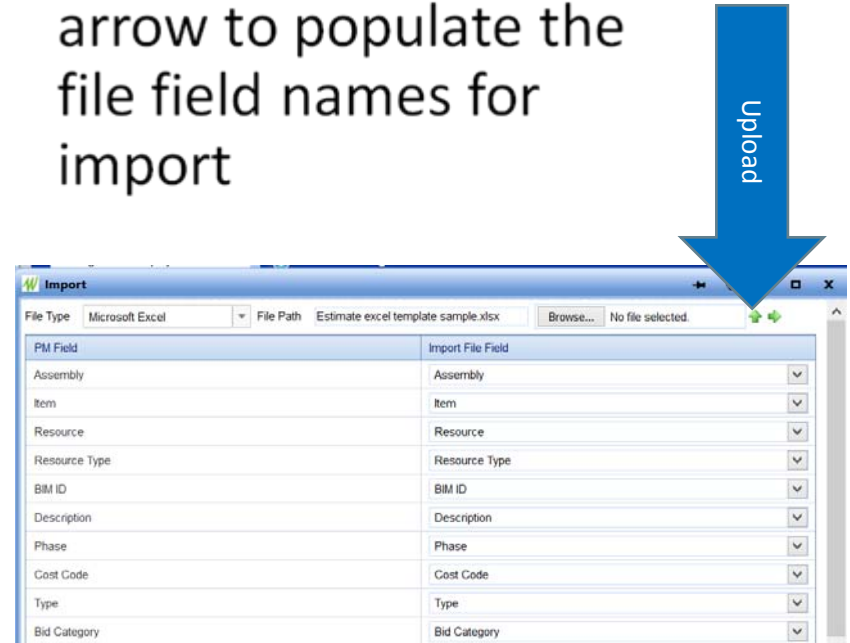
The screenshot displays the PMWeb application interface. The top navigation bar shows 'Assign workflow project' and 'Planning > Estimates'. The left sidebar contains a tree view with 'Estimates' selected. The main content area features a form for creating an estimate with fields for Project, Revision, Date, Description, Category, Reference, and Workflow Status. Below the form are tabs for 'Details', 'Adjustments', 'Specifications', 'Notes', 'Attachments', and 'Notifications'. A table with columns for Line #, Assembly, Item, Resource, Resource Type, BIM ID, Description, Mfr. #, and Manufacturer is visible, though it currently shows 'No records to display'. A blue arrow points to the 'Import > Estimate Detail' button in the top right toolbar.

Create new estimate

- Browse to select the Excel file

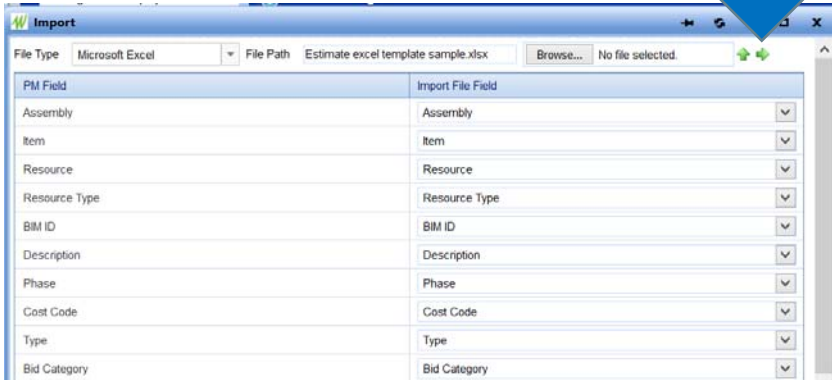


- Select the green upload arrow to populate the file field names for import



Create new estimate

- Arrow to the next page to view detail



- Save the uploaded items

Assembly	Item	Resource	Resource Type	BIM ID	Description	Phase	Cost Code
<input checked="" type="checkbox"/>	000050	0		0	01 00 00 General Requirements	0	0
<input checked="" type="checkbox"/>	000055	0		0	02 40 00 Demolition and Structure Moving	0	0
<input checked="" type="checkbox"/>	000038	0		0	02 60 00 Contaminated Site Material	0	0
<input checked="" type="checkbox"/>	000040	0		0	02 80 00 Facility Remediation	0	0
<input checked="" type="checkbox"/>	000041	0		0	03 00 00 Concrete	0	0
<input checked="" type="checkbox"/>	000058	0		0	04 00 00 Masonry	0	0
<input checked="" type="checkbox"/>	000063	0		0	05 00 00 Metals	0	0
<input checked="" type="checkbox"/>	000069	0		0	06 00 00 Woods, Plastics, and Composites	0	0
<input checked="" type="checkbox"/>	000074	0		0	07 00 00 Thermal and Moisture Prot	0	0
<input checked="" type="checkbox"/>	000092	0		0	08 00 00 Openings	0	0
<input checked="" type="checkbox"/>	000101	0		0	09 00 00 Finishes	0	0
<input checked="" type="checkbox"/>	000119	0		0	10 00 00 Specialties	0	0
<input checked="" type="checkbox"/>	000126	0		0	11 00 00 Equipment	0	0
<input checked="" type="checkbox"/>	000135	0		0	12 00 00 Furnishings	0	0
<input checked="" type="checkbox"/>	000139	0		0	13 00 00 Special Construction	0	0

Create new estimate

- Saving the import will populate your items into the estimate. Save the record.

The screenshot shows the PMWeb software interface. The left sidebar contains a navigation menu with the following items: Planning, Initiatives, Planning Worksheet, Estimates, Procurement, Procurement, Online Bidding, Setup, Items, Formulas, Assemblies, Forms, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main window is titled 'Assign workflow project' and shows a form for 'Estimates'. The form includes fields for Project*, Revision, Date, Description*, Category, Reference, Workflow Status, Estimate units, Estimate units, Cost/Unit, and Price/Unit. The 'Import' button in the toolbar is circled in red. Below the form is a table with columns: Line #, Assembly, Item, Resource, Resource Type, BIM ID, Description, Mt. #, and Manufacturer. The table contains 16 rows of data.

Line #	Assembly	Item	Resource	Resource Type	BIM ID	Description	Mt. #	Manufacturer
001		000050			0	01 00 00 General Requirements		
002		000055			0	02 40 00 Demolition and Structure Moving		
003		000038			0	02 80 00 Contaminated Site Material Removal		
004		000040			0	02 80 00 Facility Remediation		
005		000041			0	03 00 00 Concrete		
006		000058			0	04 00 00 Masonry		
007		000063			0	05 00 00 Metals		
008		000069			0	06 00 00 Woods, Plastics, and Composites		
009		000074			0	07 00 00 Thermal and Moisture Protection		
010		000092			0	08 00 00 Openings		
011		000101			0	09 00 00 Finishes		
012		000119			0	10 00 00 Specialties		
013		000126			0	11 00 00 Equipment		
014		000135			0	12 00 00 Furnishings		
015		000136			0	13 00 00 Spatial Construction		

Add line item detail (if necessary)

- Edit line items: Highlight the first row, press the Shift key, and select the bottom row to highlight all line items. Select edit. All items available to edit.

The screenshot displays the PMWeb software interface. The main window shows a table of line items for a project named 'Moyer Cafe'. The table has columns for Line #, Assembly, Item, Resource, Resource Type, BIM ID, Description, Mt. #, Manufacturer, Phase, Cost Code, Type, and Bid Category. The first row (Line # 001) is highlighted in orange. The 'Edit' button in the toolbar is circled in red. The toolbar also includes buttons for 'Add Assembly', 'Add Resource(s)', 'Add', 'Delete', 'Refresh', 'Paste From Excel', 'Save Layout', 'Load Default Layout', and 'Toggle Filters'. The left sidebar shows a navigation menu with options like Planning, Estimates, Procurement, Online Bidding, Setup, Items, Formulas, Assemblies, and Forms. The top of the interface shows the PMWeb logo and a navigation bar with 'Planning > Estimates'.

Line #	Assembly	Item	Resource	Resource Type	BIM ID	Description	Mt. #	Manufacturer	Phase	Cost Code	Type	Bid Category
001		000049				000 00 00 Procurement and Contracting Req				01-000-000 00 00		
002		000050				001 00 00 General Requirements				01-001-001 00 00		
003		000052				002 00 00 Existing Conditions				01-002-002 00 00		
004		000041				003 00 00 Concrete				01-003-003 00 00		
005		000058				004 00 00 Masonry				01-004-004 00 00		
006		000063				005 00 00 Metals				01-005-005 00 00		
007		000069				006 00 00 Woods, Plastics, and Composites				01-006-006 00 00		
008		000074				007 00 00 Thermal and Moisture Protection				01-007-007 00 00		
009		000092				008 00 00 Openings				01-008-008 00 00		
010		000101				009 00 00 Finishes				01-009-009 00 00		
011		000119				010 00 00 Specialties				01-010-010 00 00		
012		000126				011 00 00 Equipment				01-011-011 00 00		
013		000135				012 00 00 Furnishings				01-012-012 00 00		
014		000139				013 00 00 Special Construction				01-013-013 00 00		
015		000145				014 00 00 Conveying Equipment				01-014-014 00 00		

Add line item detail (if necessary)

- Add unit costs
- Save by selecting “Update Records”

The screenshot shows the PMWeb software interface. The main window is titled 'Planning > Estimates'. The left sidebar contains a navigation menu with items like Planning, Initiatives, Estimates, Procurement, Setup, Items, Formulas, Assemblies, Forms, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main area displays a form for '000290 - Assign workflow project - E'. The form includes fields for Project, Revision, Date, Description, Category, Reference, and Workflow Status. Below the form is a table with columns: Line #, Assembly, Item, Description, Quantity, Ext. Quantity, Unit Cost, Ext. Cost, Adjustment 1, Tax, Adjustment 2, and Total Cost. The 'Update Records' button is circled in red. The table contains 7 rows of data.

Line #	Assembly	Item	Description	Quantity	Ext. Quantity	Unit Cost	Ext. Cost	Adjustment 1	Tax	Adjustment 2	Total Cost
001		000050	01 00 00 General Requirements	1.00	1.00	\$50.00	\$50.00	\$0.00	\$0.00	\$0.00	\$50.00
002		000055	02 40 00 Demolition and Structure Moving	1.00	1.00	\$5,344,532.00	\$5,344,532.00	\$0.00	\$0.00	\$0.00	\$5,344,532.00
003		000038	02 00 00 Contaminated Site Material Removal	1.00	1.00	\$4,356.00	\$4,356.00	\$0.00	\$0.00	\$0.00	\$4,356.00
004		000040	02 80 00 Facility Remediation	1.00	1.00	\$43,234.00	\$43,234.00	\$0.00	\$0.00	\$0.00	\$43,234.00
005		000041	03 00 00 Concrete	1.00	1.00	\$8,785.00	\$8,785.00	\$0.00	\$0.00	\$0.00	\$8,785.00
006		000058	04 00 00 Masonry	1.00	1.00	\$7,500.00	\$7,500.00	\$0.00	\$0.00	\$0.00	\$7,500.00
007		000063	05 00 00 Metals	1.00	1.00	\$4,848.00	\$4,848.00	\$0.00	\$0.00	\$0.00	\$4,848.00

Approve and save Estimate

- Once Estimate is complete, change workflow status to “Approved” and save the record

The screenshot displays the PMWeb software interface. The left sidebar shows a navigation menu with 'Planning' selected. The main window shows the 'Estimate' form for '000255 - Moyer Cafe - Estimate #1'. The 'Workflow Status' dropdown is set to 'Approved'. A blue arrow points to the 'Approved' status, and another blue arrow points to the 'Save' button in the top toolbar. The bottom table shows the estimate details.

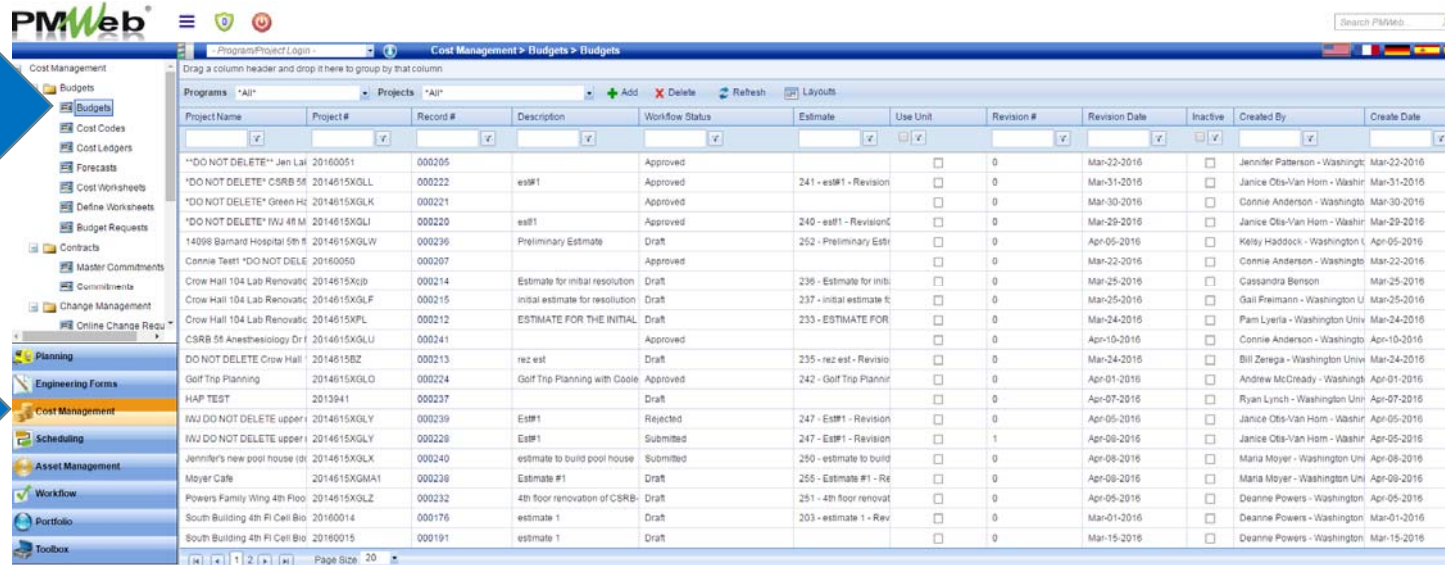
Line #	Approved	Resource	Resource Type	BIM ID	Description	Mfr. #	Manufacturer	Phase	Cost Code	Type	Bid Category
001	Rejected	000050			001 00 00 General Requirements				01-001-001 00 00		

PMWeb® Training

Budget Resolution

Build Budget for a Project

- Two ways to add navigate to Budget module
 - Cost Management Module > Budgets sub-category
 - Enter project name and click “Enter”



Project Name	Project #	Record #	Description	Workflow Status	Estimate	Use Unit	Revision #	Revision Date	Inactive	Created By	Create Date
""DO NOT DELETE"" Jen Lai	20160051	000205		Approved			0	Mar-22-2016	<input type="checkbox"/>	Jennifer Patterson - Washing	Mar-22-2016
"DO NOT DELETE" CSRB 58	2014615XGLL	000222	est#1	Approved	241 - est#1 - Revision		0	Mar-31-2016	<input type="checkbox"/>	Janice Ots-Van Horn - Washir	Mar-31-2016
"DO NOT DELETE" Green H	2014615XGLK	000221		Approved			0	Mar-30-2016	<input type="checkbox"/>	Connie Anderson - Washing	Mar-30-2016
"DO NOT DELETE" IWJ 48 M	2014615XGLJ	000220	est#1	Approved	240 - est#1 - Revision		0	Mar-29-2016	<input type="checkbox"/>	Janice Ots-Van Horn - Washir	Mar-29-2016
14098 Barnard Hospital 5th f	2014615XGLW	000236	Preliminary Estimate	Draft	262 - Preliminary Esti		0	Apr-05-2016	<input type="checkbox"/>	Kelty Haddock - Washing U	Apr-05-2016
Connie Teet "DO NOT DELE	20160050	000207		Approved			0	Mar-22-2016	<input type="checkbox"/>	Connie Anderson - Washing	Mar-22-2016
Crow Hall 104 Lab Renovati	2014615XGJb	000214	Estimate for initial resolution	Draft	236 - Estimate for initi		0	Mar-25-2016	<input type="checkbox"/>	Cassandra Benson	Mar-25-2016
Crow Hall 104 Lab Renovati	2014615XGLF	000215	initial estimate for resolution	Draft	237 - initial estimate t		0	Mar-25-2016	<input type="checkbox"/>	Gail Freimann - Washington U	Mar-25-2016
Crow Hall 104 Lab Renovati	2014615XPL	000212	ESTIMATE FOR THE INITIAL	Draft	233 - ESTIMATE FOR		0	Mar-24-2016	<input type="checkbox"/>	Pam Lyerla - Washington Univ	Mar-24-2016
CSRB 58 Anesthesiology Dr I	2014615XGLU	000241		Approved			0	Apr-10-2016	<input type="checkbox"/>	Connie Anderson - Washing	Apr-10-2016
DO NOT DELETE Crow Hall	2014615B2	000213	rez est	Draft	235 - rez est - Revisio		0	Mar-24-2016	<input type="checkbox"/>	Bill Zerega - Washington Univ	Mar-24-2016
Golf Trip Planning	2014615XGLO	000224	Golf Trip Planning with Coole	Approved	242 - Golf Trip Plannir		0	Apr-01-2016	<input type="checkbox"/>	Andrew McCready - Washing	Apr-01-2016
HAP TEST	2015941	000237		Draft			0	Apr-07-2016	<input type="checkbox"/>	Ryan Lynch - Washington Uni	Apr-07-2016
IWJ DO NOT DELETE upper I	2014615XGLY	000239	Est#1	Rejected	247 - Est#1 - Revision		0	Apr-05-2016	<input type="checkbox"/>	Janice Ots-Van Horn - Washir	Apr-05-2016
IWJ DO NOT DELETE upper I	2014615XGLY	000228	Est#1	Submitted	247 - Est#1 - Revision		1	Apr-08-2016	<input type="checkbox"/>	Janice Ots-Van Horn - Washir	Apr-05-2016
Jennifer's new pool house (B	2014615XGLX	000240	estimate to build pool house	Submitted	250 - estimate to build		0	Apr-08-2016	<input type="checkbox"/>	Maria Moyer - Washington Uni	Apr-08-2016
Moyer Cafe	2014615XGMAI	000238	Estimate #1	Draft	256 - Estimate #1 - Re		0	Apr-08-2016	<input type="checkbox"/>	Maria Moyer - Washington Uni	Apr-08-2016
Powers Family Wing 4th Flo	2014615XGLZ	000232	4th floor renovation of CSRB	Draft	251 - 4th floor renovat		0	Apr-05-2016	<input type="checkbox"/>	Deanne Powers - Washing	Apr-05-2016
South Building 4th Fl Cell Bio	20160014	000176	estimate 1	Draft	203 - estimate 1 - Rev		0	Mar-01-2016	<input type="checkbox"/>	Deanne Powers - Washington	Mar-01-2016
South Building 4th Fl Cell Bio	20160015	000191	estimate 1	Draft			0	Mar-15-2016	<input type="checkbox"/>	Deanne Powers - Washington	Mar-15-2016

Build Budget for a Project

- Double click the record to pull up the budget

The screenshot shows the PMWeb application interface. The main window displays a table of budget records under the 'Cost Management > Budgets > Budgets' path. The table has the following columns: Project Name, Project #, Record #, Description, Workflow Status, Estimate, Use Unit, Revision #, Revision Date, Inactive, Created By, and Create Date. The record for 'Moyer Cafe' is highlighted, and the 'Project Name' column is circled in red. The record details are: Project Name: Moyer Cafe, Project #: 2014815XGMA1, Record #: 000238, Description: Estimate #1, Workflow Status: Draft, Estimate: 255 - Estimate #1 - Re, Use Unit: [checkbox], Revision #: 0, Revision Date: Apr-08-2016, Inactive: [checkbox], Created By: Maria Moyer - Washington Uni, Create Date: Apr-08-2016. The left sidebar shows a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The bottom status bar indicates the database is WUSTL and the user is Maria Moyer.

Project Name	Project #	Record #	Description	Workflow Status	Estimate	Use Unit	Revision #	Revision Date	Inactive	Created By	Create Date
Moyer Cafe	2014815XGMA1	000238	Estimate #1	Draft	255 - Estimate #1 - Re	<input type="checkbox"/>	0	Apr-08-2016	<input type="checkbox"/>	Maria Moyer - Washington Uni	Apr-08-2016

Build Budget for a Project

- Two ways to navigate to Budget module
 - Project Center > Select Budgets hyperlink

The screenshot displays the PMWeb software interface. On the left, a navigation sidebar contains various modules, with 'Project Center' highlighted by a blue arrow. The main content area is titled 'Project Center' and shows details for a project named 'Moyer Cafe'. Below the project details, there are several sections: 'Planning', 'Engineering Forms', and 'Cost Management'. In the 'Engineering Forms' section, a table lists various forms with columns for 'Record Type' and 'Pending Approved'. The 'Budgets' row in this table is circled in red. To the right of the 'Engineering Forms' section, there are tabs for 'Schedule', 'Budget', and 'Custom Fields'. The 'Budget' tab is active, showing a table with columns for 'Project Date', 'Tracking', 'Admin Use Only', and 'Project Ratings'. The 'Total Project Budget' is listed as \$0.00.

Project Center

Project Center

Program: ATEST1-WUSM

Project ID*: 2014615XGMA1

Name: Moyer Cafe

Location: WUSM - ** Washington University

Project Status: -- Select --

Project Type: New Construction

Category: -- Select --

Workflow Status: Draft

Currency: Dollar (United States of America)

Target Budget: \$0.00

Target Revenue: \$0.00

Target Duration: 0 UOM -- Sele

Target Start/Finish: []

Actual Start/Finish: []

Percent Complete: 0.00%

Scope: []

Select multiple files to upload or drop files in the box below

Select

Navigator

Planning

Record Type Pending Approved

Estimates 0 1

Initiatives 0 0

Online Bidding 0 0

Procurement 0 0

Program of Requirements (PMPOR) 0 0

Engineering Forms

Record Type Pending Approved

Action Items 0 0

Correspondence 0 0

Daily Reports 0 0

Drawing Lists 0 0

Drawing Sets 0 0

Meeting Minutes 0 0

Online Submittals 0 0

Punch Lists 0 0

RFIs 0 0

Safety Forms 0 0

Submittal Sets 0 0

Submittal Items 0 0

Transmittals 0 0

Emergency Form 0 0

Cost Management

Record Type Pending Approved

AP Requests 0 0

Request Requests 0 0

Budgets 1 0

Comments 0 0

Cost Codes 0 1

Schedule

Target Projected:

Budget

Target \$0.00

Anticipated Cost: \$0.00

Custom Fields

Debt Funded Project Status Updates Square Footage

Planning and Project Request Form LEED Information Project Ratings

Project Date Tracking Admin Use Only

Edit

Spec	UOM	Data	Notes
Does Project Include a Move			
Weekly Status Update			
Plan for Next Week			
Issues and Risks Identified			
Total Project Budget		\$0.00	

Build Budget for a Project

- Note that records show one approved “Estimate” and one pending “Budget.”

The screenshot displays the PMWeb software interface. A blue arrow labeled 'Project Center' points to the 'Project Center' tab in the top navigation bar. The main content area shows project details for 'Moyer Cafe' under the 'ATEST1-WUSM' program. The 'Record Type' section is divided into three categories: Planning, Engineering Forms, and Cost Management. The 'Cost Management' section contains a table with the following data:

Record Type	Pending	Approved
AP Requests	0	0
Budget Requests	0	0
Budgets	1	0
Commitments	0	0
Cost Codes	0	1

A red circle highlights the 'Budgets' row in this table, indicating one pending budget record. Other sections visible include 'Schedule' (Target Projected: 0), 'Budget' (Target \$0.00, Anticipated Cost: \$0.00), and 'Custom Fields' (Total Project Budget: \$0.00).

Save Your Budget Record

- Cost codes from your estimate will appear in the budget record; save
 - Unit Costs are displayed as “Original Owner Budget” and “Original Project Budget:”

The screenshot displays the PMWeb software interface. A blue arrow labeled "Save" points to a save icon in the top navigation bar. Another blue arrow labeled "Estimate cost codes" points to the "Add Cost Codes" button in the table's toolbar. The main table shows a budget record for "Moyer Cafe" with a cost code "01 - Construction Co" and a description "General Requirements". The table columns include Line #, Group 1, Cost Code*, Description, Original Owner Budget, Adjustment 1, Tax, Adjustment 2, Original Project Budget, Cost Type, Funding, Company, and Tab.

Line #	Group 1	Cost Code*	Description	Original Owner Budget	Adjustment 1	Tax	Adjustment 2	Original Project Budget	Cost Type	Funding	Company	Tab
001	01 - Construction Co	01-001-001 00 00	General Requirements	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00		
				\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00		

Add Funding Sources

- Two ways to navigate to Funding Records module
 - Cost Management > Funding Records sub-category

The screenshot shows the PMWeb interface. The left sidebar contains a tree view with categories like 'Funding' and 'Cost Management'. A blue arrow labeled 'Funding Records' points to the 'Funding Records' item under 'Funding'. Another blue arrow labeled 'Cost Management' points to the 'Cost Management' item. The main window displays a form for '190 - Maria's Cafe - Estimate #1 - Rev # 0'. The form includes fields for Project, Revision, Date, Estimate, and Description. Below the form is a table with columns for Resolution, Project Roles, UCM, Data, and Notes.

Resolution	Project Roles	UCM	Data	Notes
Purpose of Project				1. The University Administration has determined the need to build a cafe near the Otis School of Business. The ca
Scope of Work				2. The scope of the project includes design and extensive renovation including mechanical, electrical, HVAC system
Projects Committee Date				Mar-31-2016
Buildings and Grounds Committee Date				Mar-31-2016
Medical Finance Committee Date				Apr-15-2016
Architect			ALBERICI CONSTRUCTORS INC	
Architect Justification			The contractor was chosen through a competitive bid process.	
Architect "Other" Justification				
Engineer				
Engineer Justification				
Engineer "Other" Justification				
Contractor				
Contractor Justification				
Contractor "Other" Justification				
Minimum Percentage of On Site MBE/WBE Participation				
Minimum Percentage of Minority Enterprise Participation				
Borrowing Source				
Plant or Project Fund				

Add Funding Sources

- Two ways to navigate to Funding Records module
 - Project Center > Select Funding Records hyperlink

The screenshot displays the PMWeb software interface. The left sidebar contains a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The 'Cost Management' category is expanded, showing sub-items such as Budgets, Cost Codes, Cost Ledgers, Forecasts, Cost Worksheets, Define Worksheets, Budget Requests, Contracts, Master Commitments, Commitments, Change Management, and Online Change Request. The main content area is titled 'Cost Management > Budgets > Budgets' and shows a 'Project Center' view. A table lists various record types and their counts. The 'Funding Records' entry is circled in red.

Record Type	Pending	Approved
Action Items	0	0
Correspondence	0	0
Daily Reports	0	0
Drawing Lists	0	0
Drawing Sets	0	0
Meeting Minutes	0	0
Online Submittals	0	0
Punch Lists	0	0
RFI's	0	0
Safety Forms	0	0
Submittal Sets	0	0
Submittal Items	0	0
Transmittals	0	0
Emergency Form	0	0
Funding Records	1	0
Submittal Requests	0	0
Miscellaneous Invoices	0	0
Online Change Requests	0	0
Progress Invoices	0	0
Commitment Apprentices	0	0

Add Funding Sources

- Add a new funding record or select your project from the board

The screenshot displays the PMWeb application interface. The left sidebar contains a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main content area is titled 'Cost Management > Funding > Funding Records'. At the top of this area, there are search filters for 'Programs' and 'Projects', both set to '*All*'. A red circle highlights the 'Projects' dropdown menu, and another red circle highlights the '+ Add' button next to it. Below these filters is a table with columns: Program, Project Name, Year, Fund Source, Code, Record #, Description, Workflow Status, Reference, Category, Revision #, and Revision. The table contains multiple rows of funding records, including entries for 'Original Funding for Danforth', '2017 Cap Plan - not global', 'Danforth Repair and', 'Taylor Avenue Building 18 N', and 'Post Test'.

Add Funding Sources

- Select the “Project” radio button in the “Allocation by” box
- Select your project and save

The screenshot displays the PMWeb application interface. The left sidebar contains a navigation menu with items like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main content area shows the 'Funding Records' form for record 87. The 'Allocation by' section is highlighted with a red oval, showing the 'Project' radio button selected and 'Project' chosen in the dropdown menu. The 'Add' button is also highlighted with a red circle.

Line #	Year	Project	Program	Source	Code	Cost Allocation	WBS	Period	Task	Start	Finish	Curve
No records to display.												

Add Funding Sources

- On the “details” tab, select “Add”

The screenshot displays the PMWeb application interface. The left sidebar contains a navigation menu with categories like Cost Books, Cost Ledgers, Forecasts, Cost Worksheets, Budget Requests, Contracts, Master Commitments, Commitments, Change Management, and Online Change Reqs. The main window is titled 'Cost Management > Funding > Funding Records' and shows a form for adding a new funding record. The form includes fields for Year, Funding Source, Code, Records #, Description, Workflow Status, Reference, Category, and Revision. A table below the form is currently empty, with a red circle highlighting the 'Add' button in the table header. A blue arrow labeled 'Details tab' points to the 'Details' tab in the table's navigation bar. The bottom status bar indicates the user is logged in as 'User' and the database is 'WUSTL'.

Add Funding Sources

- In the “Source” field, select the Funding Source
- In the “Cost Allocation” field enter the amount that the source will fund; Save

The screenshot displays the PMWeb interface for adding funding records. The top navigation bar shows 'Cost Management > Funding > Funding Records'. The main form area includes fields for Year, Funding Source, Code, Record # (87), Description (Funding), Workflow Status (Draft), Reference, Category, and Revision (0). A table below the form lists funding sources with columns for Line #, Source, Code, Cost Allocation, WBS, Report, Task, Start, Finish, and Curve. The 'Save' button is circled in red. Two blue arrows point from the 'Source' and 'Cost Allocation' columns of the table to the text labels 'Source' and 'Cost Allocation' respectively.

Line #	Source	Code	Cost Allocation	WBS	Report	Task	Start	Finish	Curve
000	(None)		\$0.00						

Add Funding Sources

- Once all funding sources have been added, save
 - Note: There may be multiple funding sources for a project, and the Cost Allocation must add up to the budget amount
- You are ready to generate a budget resolution.

The screenshot displays the PMWeb interface for 'Funding Records'. The top navigation bar shows 'Cost Management > Funding > Funding Records'. The main area contains a form for adding or editing a funding record. A red circle highlights the 'Save' icon in the top toolbar. The form fields include: Year (None), Funding Source (Select), Code, Record #* (0033), Description (TEST - funding by school), Workflow Status (Approved), Reference, Category (Select), Revision (0), and Date (Jan-20-2016). Below the form is a table with columns: Line #, Year, Project, Program, Source, Code, Cost Allocation, WBS, Period, and Task. The table contains five rows of data.

Line #	Year	Project	Program	Source	Code	Cost Allocation	WBS	Period	Task
001		(Program)	NO WKFLOW - INTEG	Sam Fox School Allo		\$2,000,000.00			
002		(Program)	NO WKFLOW - INTEG	Law School Allocation		\$5,000,000.00			
003		(Program)	NO WKFLOW - INTEG	CFU Allocation		\$10,000,000.00			
004		(Program)	NO WKFLOW - INTEG	Brown School Allocation		\$1,000,000.00			
005		(Program)	NO WKFLOW - INTEG	Arts & Sciences Allo		\$15,000,000.00			

Add Resolution Details

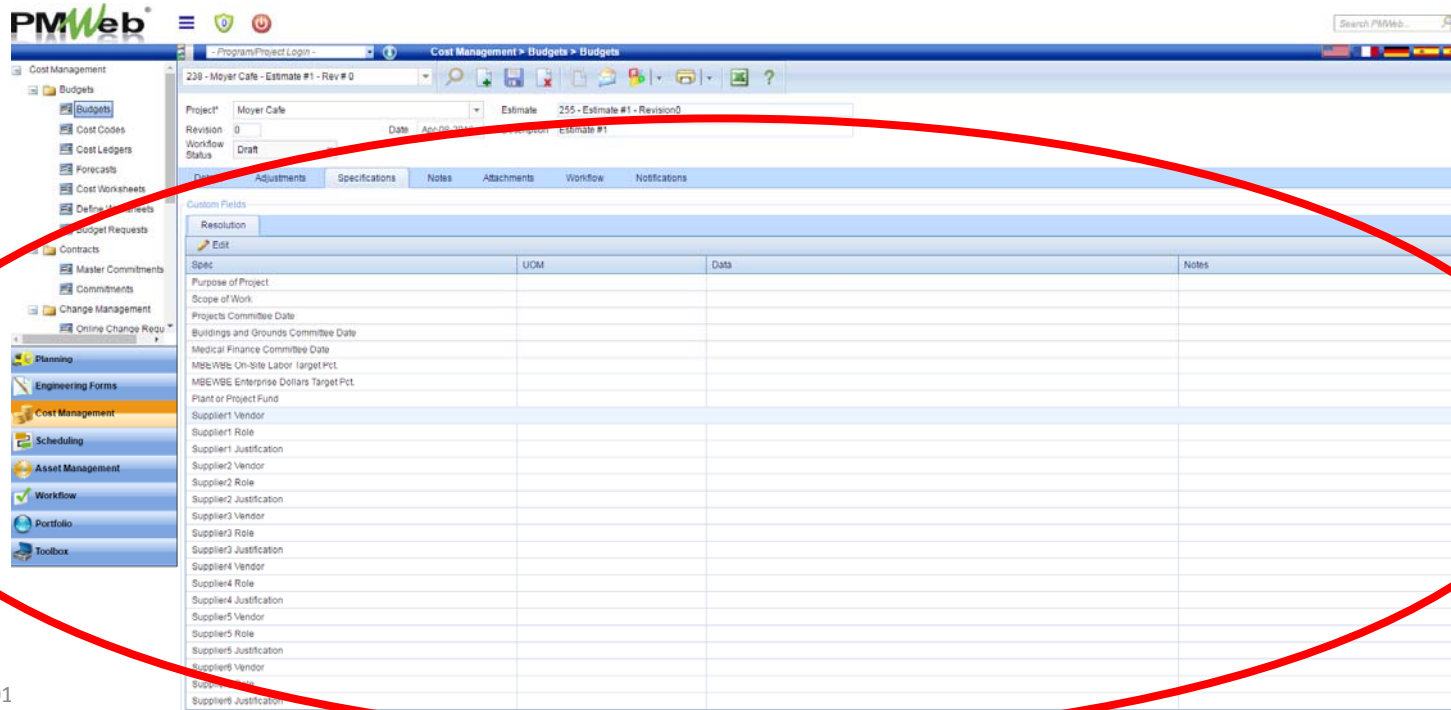
- Enter resolution details
 - Navigate to the “Specifications” tab

The screenshot displays the PMWeb software interface. The left sidebar shows a navigation menu with 'Cost Management' selected. The main window title is 'Cost Management > Budgets > Budgets'. The current view is for '238 - Moyer Cafe - Estimate #1 - Rev # 0'. The 'Specifications' tab is selected and circled in red. Below the tab, there is a table with the following data:

Line #	Group1	Cost Code*	Description	Original Owner Budget	Adjustment 1	Tax	Adjustment 2	Original Project Budget	Cost Type	Funding	Company	Tax
001	01 - Construction Co	01-001-001 00 00	General Requirements	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00				
				\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00				

Add Resolution Details

- Enter resolution details that will appear in the resolution document



The screenshot displays the PMWeb software interface. The left sidebar shows a navigation menu with categories like Cost Management, Planning, Engineering Forms, Cost Management (highlighted), Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main window shows a 'Budgets' view for '228 - Moyer Cafe - Estimate #1 - Rev # 0'. The 'Resolution' section is active, showing a table with columns for 'Spec', 'UCM', 'Data', and 'Notes'. The table contains various project-related items such as 'Purpose of Project', 'Scope of Work', 'Projects Committee Date', 'Buildings and Grounds Committee Date', 'Medical Finance Committee Date', 'MEL/WBC On-Site Labor Target Pct', 'MEL/WBC Enterprise Dollars Target Pct', 'Plant or Project Fund', and multiple 'Supplier' entries (Supplier1 through Supplier6) with their respective roles and justifications.

Spec	UCM	Data	Notes
Purpose of Project			
Scope of Work			
Projects Committee Date			
Buildings and Grounds Committee Date			
Medical Finance Committee Date			
MEL/WBC On-Site Labor Target Pct			
MEL/WBC Enterprise Dollars Target Pct			
Plant or Project Fund			
Supplier1 Vendor			
Supplier1 Role			
Supplier1 Justification			
Supplier2 Vendor			
Supplier2 Role			
Supplier2 Justification			
Supplier3 Vendor			
Supplier3 Role			
Supplier3 Justification			
Supplier4 Vendor			
Supplier4 Role			
Supplier4 Justification			
Supplier5 Vendor			
Supplier5 Role			
Supplier5 Justification			
Supplier6 Vendor			
Supplier6 Justification			

Add Resolution Details

- Click top record (Purpose of Project), hold the “Shift” key, click bottom record to select all records; select edit to open all fields

The screenshot shows the PMWeb application interface. The left sidebar contains a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main content area displays the 'Budgets' section for '238 - Moyer Cafe - Estimate #1 - Rev #0'. The 'Resolution' button is circled in red. Below the 'Resolution' button, the 'Edit' button is highlighted. The 'Purpose of Project' record is selected, and the 'Edit' button is highlighted. The 'Edit' button is highlighted. The 'Edit' button is highlighted.

Add Resolution Details

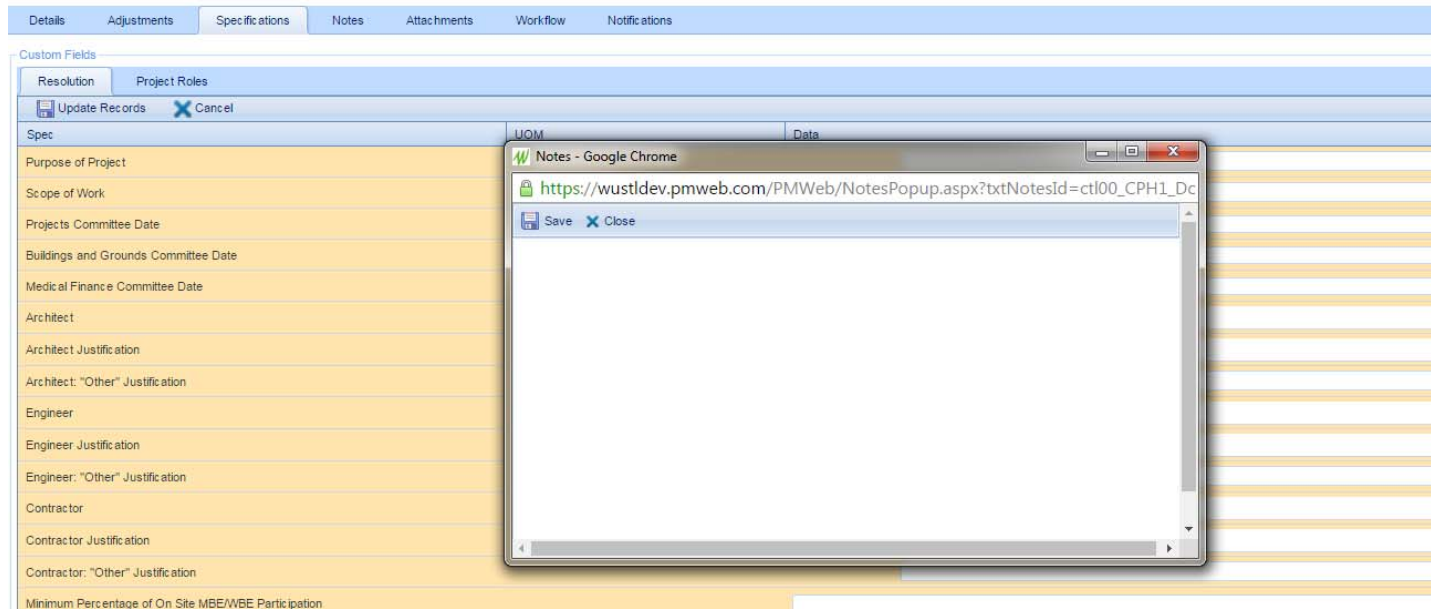
- Enter resolution information

The screenshot displays the PMWeb software interface. The main window is titled '230 - Moyer Cafe - Estimate #1 - Rev # 0' and is part of the 'Cost Management > Budgets > Budgets' navigation path. The 'Resolution' dialog box is open, showing a table with columns for 'Spec', 'UCM', 'Data', and 'Notes'. The table contains the following rows:

Spec	UCM	Data	Notes
Purpose of Project			
Scope of Work			
Projects Committee Date			
Buildings and Grounds Committee Date			
Medical Finance Committee Date			
MBEWBE On-Site Labor Target Pct			
MBEWBE Enterprise Dollars Target Pct			
Plant or Project Fund		-- Select --	
Supplier1 Vendor		-- Select --	
Supplier1 Role		-- Select --	
Supplier1 Justification			
Supplier2 Vendor		-- Select --	
Supplier2 Role		-- Select --	
Supplier2 Justification			
Supplier3 Vendor		-- Select --	
Supplier3 Role		-- Select --	
Supplier3 Justification			
Supplier4 Vendor		-- Select --	
Supplier4 Role		-- Select --	
Supplier4 Justification			

Add Resolution Details

- For large amounts of text, select the magnifying glass to the right of a text field to open a notes box



Add Resolution Details

- Once all fields are updated, select Update Records to save

The screenshot displays the RIVER software interface for 'Cost Management > Budgets > Budgets'. The main window shows the 'Resolution' section for 'Project: Moye Cafe'. The 'Update Records' button is circled in red. Below the button is a table with columns for 'Spec', 'UOM', 'Data', and 'Notes'. The table contains several rows of data, including 'Purpose of Project', 'Scope of Work', 'Projects Committee Date', 'Buildings and Grounds Committee Date', 'Medical Finance Committee Date', 'MBEWBE On-Site Labor Target Pct', 'MBEWBE Enterprise Dollars Target Pct', 'Plant or Project Fund', 'Supplier1 Vendor', 'Supplier1 Role', 'Supplier1 Justification', 'Supplier2 Vendor', 'Supplier2 Role', 'Supplier2 Justification', 'Supplier3 Vendor', 'Supplier3 Role', 'Supplier3 Justification', 'Supplier4 Vendor', 'Supplier4 Role', 'Supplier4 Justification', and 'Supplier5 Vendor'.

Spec	UOM	Data	Notes
Purpose of Project			This is a test
Scope of Work			This is a test to build a new cafe on WUSM campus.
Projects Committee Date			Apr-15-2016
Buildings and Grounds Committee Date			Apr-15-2016
Medical Finance Committee Date			Apr-15-2016
MBEWBE On-Site Labor Target Pct			5
MBEWBE Enterprise Dollars Target Pct			5
Plant or Project Fund		Plant Fund	
Supplier1 Vendor		ALBERICI CONSTRUCTORS INC	
Supplier1 Role		General Contractor	
Supplier1 Justification		The contractor was selected through a competitive bid process	
Supplier2 Vendor		-- Select --	
Supplier2 Role		-- Select --	
Supplier2 Justification			
Supplier3 Vendor		-- Select --	
Supplier3 Role		-- Select --	
Supplier3 Justification			
Supplier4 Vendor		-- Select --	
Supplier4 Role		-- Select --	
Supplier4 Justification			
Supplier5 Vendor		-- Select --	

Save Resolution Details

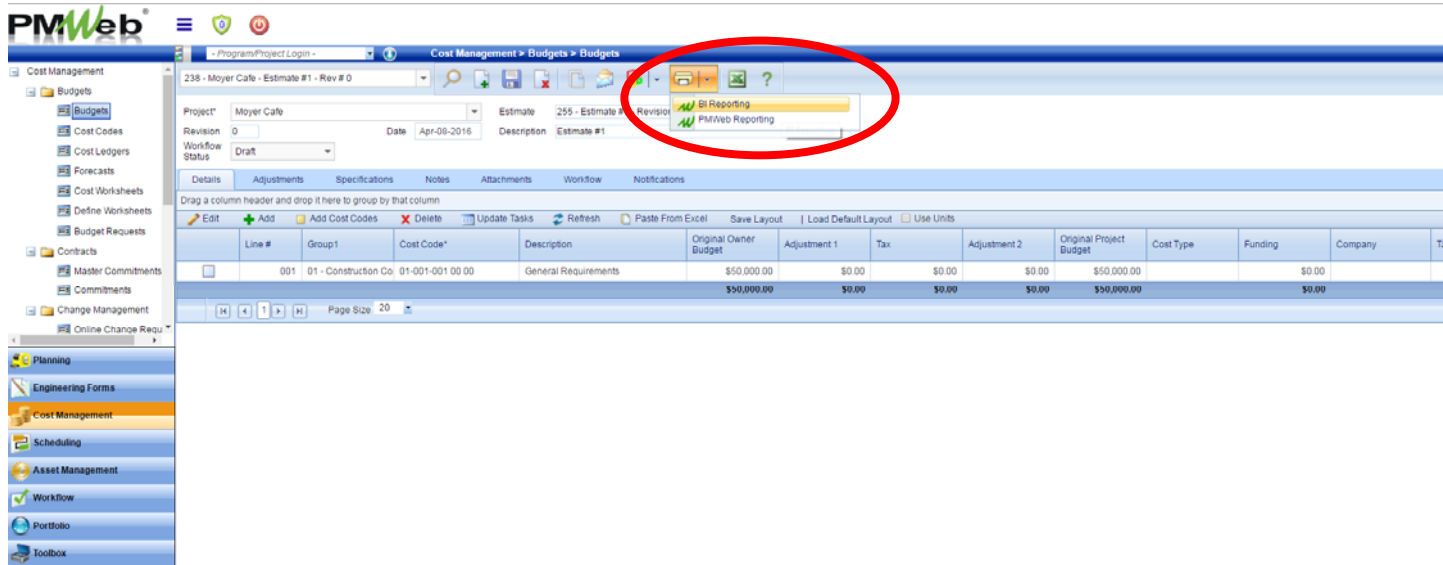
- Select save to store all resolution information on the budget record

The screenshot shows the PMWeb software interface. The top toolbar contains several icons, with the 'Save' icon (a floppy disk) circled in red. The main window displays the 'Budgets' section for a project named 'Moyer Cafe'. Below the toolbar, there are tabs for 'Details', 'Adjustments', 'Specifications', 'Notes', 'Attachments', 'Workflow', and 'Notifications'. The 'Resolution' section is active, showing a table with the following columns: 'Spec', 'UCM', 'Data', and 'Notes'.

Spec	UCM	Data	Notes
Purpose of Project		This is a test.	
Scope of Work		This is a test to build a new cafe on WUSM campus.	
Projects Committee Date			Apr-15-2016
Buildings and Grounds Committee Date			Apr-15-2016
Medical Finance Committee Date			Apr-15-2016
MIS:WBE On-site Labor target Pct			5
MIS:WBE Enterprise Dollars Target Pct			5
Plant or Project Fund			Plant Fund
Supplier1 Vendor			ALBERICI CONSTRUCTORS INC
Supplier1 Role			General Contractor
Supplier1 Justification		The contractor was selected through a competitive bid process	
Supplier2 Vendor			
Supplier2 Role			
Supplier2 Justification			
Supplier3 Vendor			
Supplier3 Role			
Supplier3 Justification			
Supplier4 Vendor			
Supplier4 Role			
Supplier4 Justification			
Supplier5 Vendor			
Supplier5 Role			
Supplier5 Justification			
Supplier6 Vendor			
Supplier6 Role			
Supplier6 Justification			

Generate Resolution

- Navigate to the printer icon drop down, and select BI reporting.



The screenshot displays the PMWeb software interface. The top navigation bar shows 'Cost Management > Budgets > Budgets'. A printer icon in the toolbar is circled in red, with a dropdown menu open showing 'Bi Reporting' and 'PMWeb Reporting' options. The main content area shows a table with columns for 'Line #', 'Group1', 'Cost Code*', 'Description', 'Original Owner Budget', 'Adjustment 1', 'Tax', 'Adjustment 2', 'Original Project Budget', 'Cost Type', 'Funding', and 'Company'. The table contains one row of data for 'General Requirements' with a budget of \$50,000.00.

Line #	Group1	Cost Code*	Description	Original Owner Budget	Adjustment 1	Tax	Adjustment 2	Original Project Budget	Cost Type	Funding	Company	Ta
001	01 - Construction Co	01-001-001 00 00	General Requirements	\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00				
				\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00				\$0.00

Generate Resolution

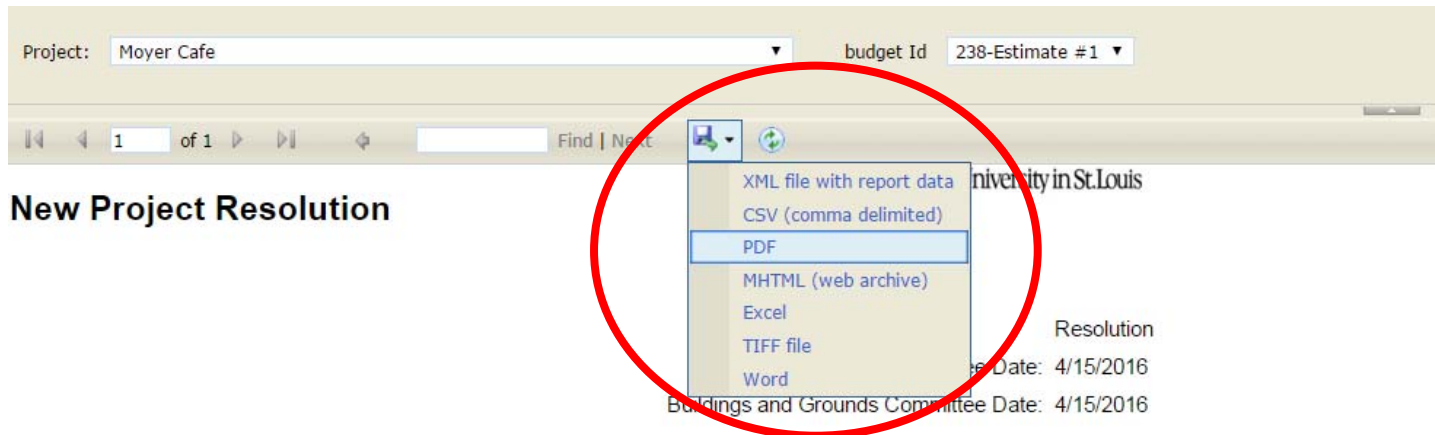
- The Report Viewer window will display
- Select “Resolution”
- Select “Report Viewer” to display entire report

The screenshot shows the PMWeb software interface. The main window displays the 'Reports Preview' dialog box, which is highlighted with a red circle. In this dialog, the 'Resolution' report is selected. Below the dialog, the 'Report Viewer' button is also highlighted with a red circle. The background shows the 'Cost Management' section of the software, with a table of project data.

Project	Cost Type	Funding	Company	Ta
-0.000.00				
40,000.00		\$0.00		

Generate Resolution

- Review Resolution for correctness; make any changes necessary in spec fields and rerun the report
 - Select “save” icon drop down in the top and save as PDF



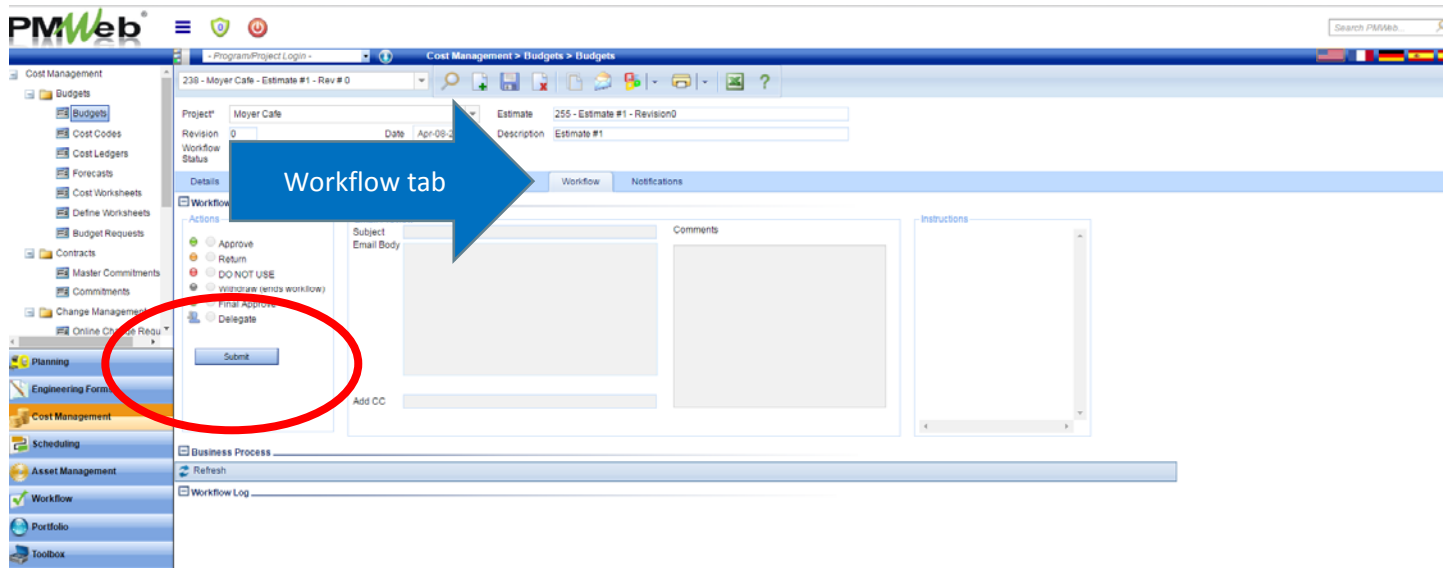
Washington University School of Medicine

Moyer Cafe

Project No. 2014615XGMA1

Submit Resolution into Workflow

- Select the “Workflow” tab
- Select Submit



Submit Resolution into Workflow

- Select Save
 - You will receive notification re: the status of the workflow

The screenshot displays the PMWeb interface for a workflow submission. The left sidebar shows a navigation menu with 'Cost Management' selected. The main window shows the 'Workflow Actions' section with a 'Save' button circled in red. Below this is a table of workflow steps and a 'Workflow Log' section.

#	Type	All Must Approve	Due Date	Role	User	Delegate	Instructions	RAM
1	✓	<input type="checkbox"/>	Apr-16-2016	(WUSM) Director of Cap	Steve Sobo			
2	✓	<input type="checkbox"/>	Apr-21-2016	Super User	Admin			
3	✓	<input type="checkbox"/>	Apr-26-2016	(WUSM) Associate Vice	Steve Sobo			
4	←	<input type="checkbox"/>		-- APM --	Budget > \$100k			

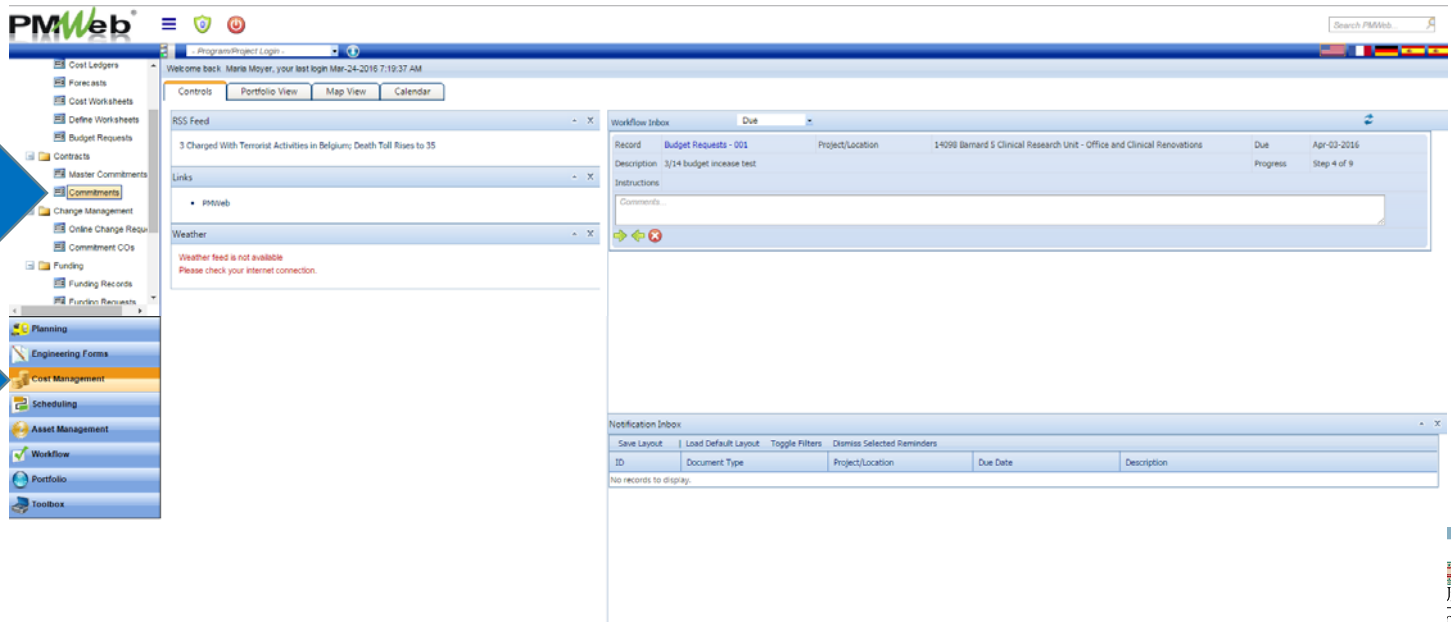
Email	Generated	Step	Due Date	Role	User	Action Date	Action Time	Action	Delegate	Team Input	Document Value	Signature	Comments
				-- Submitter --	Maria Moyert139354306	Apr-11-2016	10:46:42 AM	Submit					

PMWeb[®] Training

Generate Commitment and Commitment Report

Generate Commitment

- Two ways to navigate to Commitments module
 - Cost Management > Commitments sub-category



The screenshot shows the PMWeb application interface. The left sidebar contains a navigation menu with the following items: Cost Ledgers, Forecasts, Cost Worksheets, Define Worksheets, Budget Requests, Contracts, Master Commitments, **Commitments** (highlighted), Change Management, Online Change Request, Commitment COs, Funding, Funding Records, Funding Requests, Planning, Engineering Forms, **Cost Management** (highlighted), Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main content area displays a welcome message for Marie Meyer, login information, and several widgets: RSS Feed, Links, Weather, Workflow Inbox (showing a record for Budget Requests - 001), and Notification Inbox.

Generate Commitment

- The Commitments board will display
 - Select “Add” to create a new commitment

The screenshot displays the PMWeb software interface. The main window is titled "Cost Management > Contracts > Commitments". A red circle highlights the "Add" button in the top toolbar. The interface includes a left-hand navigation menu with categories like Budgets, Contracts, and Commitments. The main area shows a table of commitments with columns for Project Name, Project #, Record #, Description, Workflow status, Type, Company, Original Value, Change Orders, Billed, Reference, Master, Effective Date, and Procurement #.

Project Name	Project #	Record #	Description	Workflow status	Type	Company	Original Value	Change Orders	Billed	Reference	Master	Effective Date	Procurement #
KLL Pedestrian Walkway Ref	KLL1234	000001	KLL Pedestrian Walkway Ref	Approved	Subcontract	Sample Contractor 3	\$111,250.00	\$0.00	\$500.00	12345		Aug-27-2014	0
KLL Pedestrian Walkway Ref	KLL1234	1196653	MCDONNELL SCI REPLACE	Approved	Purchase Order	8760 ENGINEERING LLC	\$71,100.00	\$0.00	\$0.00	(Encumbrance No.)		Jan-07-2010	0
KLL Pedestrian Walkway Ref	KLL1234	15301252	EAST MCD/CSRB-NTA DCM	Approved	Purchase Order	GRAINGER INC	\$691.79	\$0.00	\$0.00	(Encumbrance No.)		Mar-23-2010	0
KLL Pedestrian Walkway Ref	KLL1234	000002		Draft	Subcontract	12TWENTY INC	\$0.00	\$0.00	\$0.00				
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Renovate 1fl exam room	Approved			\$31,809.00	\$1,002.83	\$32,811.83				0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design fees	Approved	Purchase Order	EISENBERG ARCHITECTS	\$6,050.00	\$-3,110.00	\$2,940.00	3809078M		Dec-16-2014	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000002	asbestos inspection and bulk	Approved	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$195.00	\$600.00	3815326M		Oct-07-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000003	asbestos inspection and bulk	Withdrawn	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$0.00	\$0.00	3815326M		Oct-23-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000004	test commitment for invoice v	Approved	Purchase Order	A AND N CORPORATION	\$0.00	\$0.00	\$0.00	999999		Jan-13-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Eng. serv for retro commissio	Draft	Owner Engineer Agre	8760 ENGINEERING LLC	\$212,000.00	\$0.00	\$0.00			Feb-15-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design modifications to BUC k	Approved	Consulting Services	CANNON DESIGN ARCHIT	\$10,040.00	\$0.00	\$0.00			Jan-10-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000201	carpet, tile and mastic removi	Draft	Continuing Services	CARDINAL ENVIRONMEN	\$35,082.00	\$0.00	\$0.00			Feb-18-2016	0
For Testing Change Orders	TEMPINT06	000001	General Contractor	Approved	Stipulated Sum Agree	CLAYCO CONSTRUCTION	\$872,848.00	\$148,855.00	\$0.00			Jan-01-2016	0
For Testing Change Orders	TEMPINT06	000001	Testing Architectural Agreem	Approved	Owner Architect Agre	MACKEY MITCHELL ARCH	\$190,250.00	\$0.00	\$0.00			Feb-24-2016	0
Sidewalk Repair 2015 Ph2	16068	000001		Approved	Purchase Order	FIXTURE CONTRACTING	\$24,887.00	\$271.00	\$18,868.50				
Taylor Avenue Building 1fl Me	16060	3621495M		Approved	Purchase Order	BSA LIFESTRUCTURES II	\$59,200.00	\$0.00	\$0.00	3621495M			0
Taylor Avenue Building 1fl Me	16060	000002		Approved	Purchase Order	FARMER ENVIRONMENTAL	\$555.00	\$445.00	\$0.00	3630921M			0
Taylor Avenue Building 1fl Me	16060	000003		Approved	Purchase Order		\$4,500.00	\$0.00	\$0.00	3635243M			0
Taylor Avenue Building 1fl Me	16060	000004		Approved	Purchase Order	DUCT SYSTEMS INCORP	\$2,754.57	\$0.00	\$0.00	3643724M			0
Taylor Avenue Building 1fl Me	16060	000005		Approved	Stipulated Sum Agree		\$589,500.00	\$0.00	\$30,000.00				0

Generate Commitment

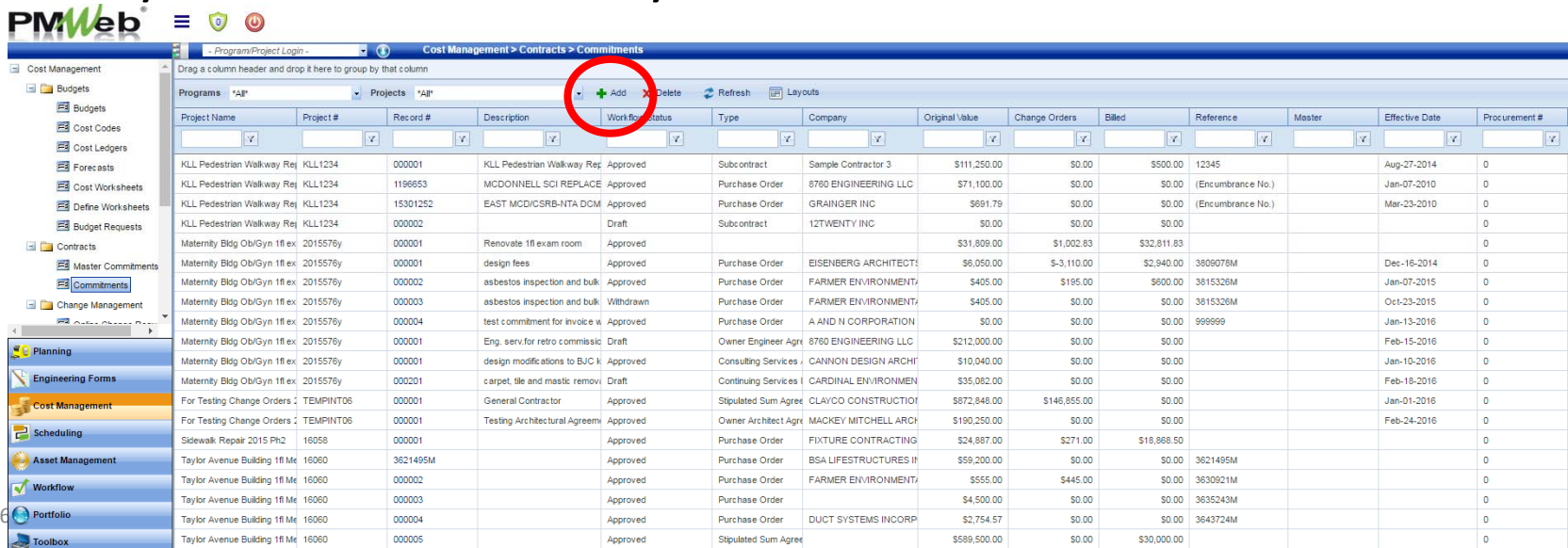
- Two ways to navigate to Commitments module
 - Project Center > Commitments hyperlink

The screenshot displays the PMWeb software interface. A blue arrow points to the 'Project Center' option in the left-hand navigation menu. The main content area shows the 'Project Center' tab selected, with a 'Commitments' link circled in red. Below this, a table lists various project management metrics.

Record Type	Pending	Approved
A/P Payments	0	0
Budget Requests	0	0
Budgets	0	1
Commitment COs	0	0
Commitments	1	2
Costs	0	1
Forecasts	0	0
Funding Authorizations	0	0
Funding Records	1	0
Funding Requests	0	0
Miscellaneous Invoices	0	0
Online Change Requests	0	0
Progress Invoices	0	0
Commitment Apprentices	0	0

Generate Commitment

- The Commitments board will display
 - Select “Add” to create a new commitment
 - Note: if the project does not yet have any commitments, you will be taken directly to a new commitment record



The screenshot displays the PMWeb software interface, specifically the 'Commitments' board. The interface includes a navigation sidebar on the left with categories like Budgets, Contracts, and Change Management. The main area shows a table of commitment records with columns for Project Name, Project #, Record #, Description, Work Status, Type, Company, Original Value, Change Orders, Billed, Reference, Master, Effective Date, and Procurement #. A red circle highlights the 'Add' button in the top toolbar, which is used to create new commitments.

Project Name	Project #	Record #	Description	Work Status	Type	Company	Original Value	Change Orders	Billed	Reference	Master	Effective Date	Procurement #
KLL Pedestrian Walkway Rej	KLL1234	000001	KLL Pedestrian Walkway Rej	Approved	Subcontract	Sample Contractor 3	\$111,250.00	\$0.00	\$500.00	12345		Aug-27-2014	0
KLL Pedestrian Walkway Rej	KLL1234	1196653	MCDONNELL SCI REPLACE	Approved	Purchase Order	8760 ENGINEERING LLC	\$71,100.00	\$0.00	\$0.00	(Encumbrance No.)		Jan-07-2010	0
KLL Pedestrian Walkway Rej	KLL1234	15301252	EAST MCD/C/SRB-NITA DCM	Approved	Purchase Order	GRAINGER INC	\$691.79	\$0.00	\$0.00	(Encumbrance No.)		Mar-23-2010	0
KLL Pedestrian Walkway Rej	KLL1234	000002		Draft	Subcontract	12TWENTY INC	\$0.00	\$0.00	\$0.00				0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Renovate 1fl exam room	Approved			\$31,809.00	\$1,002.83	\$32,811.83				0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design fees	Approved	Purchase Order	EISENBERG ARCHITECTS	\$6,050.00	\$-3,110.00	\$2,940.00	3080976M		Dec-16-2014	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000002	asbestos inspection and bulk	Approved	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$195.00	\$600.00	3815326M		Jan-07-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000003	asbestos inspection and bulk	Withdrawn	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$0.00	\$0.00	3815326M		Oct-23-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000004	test commitment for invoice w	Approved	Purchase Order	A.A.N.D.N CORPORATION	\$0.00	\$0.00	\$0.00	999999		Jan-13-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Eng. serv for retro commissio	Draft	Owner Engineer Agre	8760 ENGINEERING LLC	\$212,000.00	\$0.00	\$0.00			Feb-15-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design modifications to BJC k	Approved	Consulting Services	CANNON DESIGN ARCHIT	\$10,040.00	\$0.00	\$0.00			Jan-10-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000201	carpet, tile and mastic removi	Draft	Continuing Services	CARDINAL ENVIRONMEN	\$35,082.00	\$0.00	\$0.00			Feb-18-2016	0
For Testing Change Orders	TEMPINT06	000001	General Contractor	Approved	Stipulated Sum Agree	CLAYCO CONSTRUCTION	\$872,848.00	\$146,855.00	\$0.00			Jan-01-2016	0
For Testing Change Orders	TEMPINT06	000001	Testing Architectural Agree	Approved	Owner Architect Agre	MACKEY MITCHELL ARCH	\$190,250.00	\$0.00	\$0.00			Feb-24-2016	0
Sidewalk Repair 2015 Ph2	16058	000001		Approved	Purchase Order	FIXTURE CONTRACTING	\$24,887.00	\$271.00	\$18,868.50				0
Taylor Avenue Building 1fl Me	16060	3621495M		Approved	Purchase Order	BSA LIFESTRUCTURES II	\$59,200.00	\$0.00	\$0.00	3621495M			0
Taylor Avenue Building 1fl Me	16060	000002		Approved	Purchase Order	FARMER ENVIRONMENTAL	\$555.00	\$445.00	\$0.00	3630921M			0
Taylor Avenue Building 1fl Me	16060	000003		Approved	Purchase Order		\$4,500.00	\$0.00	\$0.00	3635245M			0
Taylor Avenue Building 1fl Me	16060	000004		Approved	Purchase Order	DUCT SYSTEMS INCORP	\$2,754.57	\$0.00	\$0.00	3643724M			0
Taylor Avenue Building 1fl Me	16060	000005		Approved	Stipulated Sum Agree		\$589,500.00	\$0.00	\$30,000.00				0

Generate Commitment

- In the “Type” field select type of agreement
 - NOTE: Do not select “Sub-Contract” as subcontractors will be addressed in the various other agreement types

The screenshot displays the PMWeb software interface for generating a commitment. A blue arrow points to the 'Type' dropdown menu, which is circled in red. The dropdown menu lists various agreement types, including 'Subcontract', 'Purchase Order', 'Contract Agreement', etc. The interface also shows a 'Billing' section with options for overbilling and a table for costs and days.

Costs	Days
Original Value	\$0.00 0.00
Approved Changes	\$0.00 0.00
Revised Value	\$0.00 0.00
Billed	\$0.00
Retained	\$0.00
Balance Due	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00
Unpaid	\$0.00
Pending Changes	\$0.00 0.00
Projected Value	\$0.00 0.00

Generate Commitment

- The ID will be auto-generated
- In the “Company” field, select the vendor

The screenshot displays the PMWeb software interface for generating a commitment. The breadcrumb navigation shows 'Cost Management > Contracts > Commitments'. The left sidebar contains a tree view with 'Project' highlighted under 'Commitments'. A blue arrow points from the 'Project' label to the 'Moyer Cafe' dropdown menu in the 'Project*' field. The 'Company' field is also set to 'Moyer Cafe'. The 'Billing' section has 'Do not allow overbilling (revised value or lines)' selected. The 'Costs' and 'Days' summary table is visible on the right.

	Costs	Days
Original Value	\$0.00	0.00
Approved Changes	\$0.00	0.00
Revised Value	\$0.00	0.00
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	0.00
Projected Value	\$0.00	0.00

Generate Commitment

- Select “Effective Date”
 - This date will populate on the contract header
- “Procurement #” field is autopopulated if a bid was involved. Otherwise this field should be NULL

Effective Date

6/20/2015

Generate Commitment

- Select “Allow overbilling” radio button and “Up to XX% of revised value”; save record

The screenshot displays the PMWeb interface for generating a commitment. The 'Billing' section is highlighted with a red circle, showing the following options:

- Do not allow overbilling (revised value or lines)
- Allow overbilling
 - Up to 0.00% of revised value
 - Up to 0.00% of line item

The 'Costs' table shows the following values:

	Costs	Days
Original Value	\$15,000.00	0.00
Approved Changes	\$15,000.00	0.00
Revised Value	\$30,000.00	0.00
Billed	\$1,000.00	
Retained	\$200.00	
Balance Due	\$800.00	
Payments Applied	\$0.00	
Open Balance	\$800.00	
Unbilled	\$29,000.00	
Pending Changes	\$0.00	0.00
Projected Value	\$30,000.00	0.00

The 'Details' table below shows the following data:

Line #	Item	Description	Ext. Cost	Adjustment 1	Tax	Adjustment 2	Total Cost	Cost Code
001	000041	003 00 00 Concrete	\$10,000.00	\$0.00	\$0.00	\$0.00	\$10,000.00	01-003-003 00 00
002	000063	005 00 00 Metals	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00	01-005-005 00 00
			\$15,000.00	\$0.00	\$0.00	\$0.00	\$15,000.00	

Add Commitment Details

- Select “Add items” to add cost codes to the commitment

The screenshot displays the PMWeb interface for managing commitments. The main window shows details for 'ALBERICI CONSTRUCTORS INC - 002'. The interface includes a left-hand navigation pane with categories like Budgets, Contracts, and Change Management. The central area contains form fields for project information (Project: Moyer Cafe, Company: ALBERICI CONSTRUCTORS INC), billing terms (Billing Terms: 30), and a summary table of costs and days. At the bottom, a table lists commitment items with columns for Line #, Item, Description, Ext. Cost, Adjustment 1, Adjustment 2, Total Cost, and Cost Code. The 'Add Items' button is circled in red, and a blue arrow points to the 'Details tab' in the navigation pane.

Original Value	Costs	Days
Approved Changes	\$15,000.00	0.00
Revised Value	\$30,000.00	0.00
Billed	\$1,000.00	
Retained	\$200.00	
Balance Due	\$800.00	
Payments Applied	\$0.00	
Open Balance	\$800.00	
Unbilled	\$29,000.00	
Pending Changes	\$0.00	0.00
Projected Value	\$30,000.00	0.00

Line #	Item	Description	Ext. Cost	Adjustment 1	Adjustment 2	Total Cost	Cost Code
001	000041	003 00 00 Concrete	\$10,000.00	\$0.00	\$0.00	\$10,000.00	01-003-003 00 00
002	000063	005 00 00 Metals	\$5,000.00	\$0.00	\$0.00	\$5,000.00	01-005-005 00 00
			\$15,000.00	\$0.00	\$0.00	\$15,000.00	

Add Commitment Details

- Drag line items into the cost code window
- Save

The screenshot displays a software window titled "Cost Management > Contracts > Commitments" for "ALBERICI CONSTRUCTORS INC - 002 -". The interface includes a left-hand navigation pane with categories like Budgets, Contracts, and Change Management. The main area shows a list of "Typical Cost Codes" on the left and a table of items on the right. A red circle highlights the "Save" button in the top left of the window. Another red circle highlights a row in the table with the following data:

#	Description	Phase	Cost Code	Type	Unit Cos
1	000041 003 00 00 Concrete	Phase	01-003-003 00 00	Type	1 0.00

Add Commitment Details

- Cost codes will now appear on “Detail” tab
- Use shortcut: select top row; shift; bottom row; edit
- Enter cost values into the “Ext Cost” field; Update Records

The screenshot shows the PMWeb interface for 'ALBERICI CONSTRUCTORS INC - 002'. The 'Commitments' tab is active, displaying a form for contract details and a table of commitment lines. The form includes fields for Type, Project, ID, Company, Description, PO#, Revision, Effective Date, Days, Procurement #, and Paid In Full. The 'Billing' section has options for overbilling and retention. The 'Delivery' section has fields for Due Date, Scheduled Delivery Date, and Ship To. A summary table on the right shows Original Value, Approved Changes, Revised Value, Billed, Retained, Balance Due, Payments Applied, Open Balance, Unbilled, Pending Changes, and Projected Value. The table below has columns for Line #, Item, Description, Ext. Cost, Adjustment 1, Tax, Adjustment 2, Total Cost, Cost Code, Cost Type, Cost Period, and Phase. The 'Update Records' button and the 'Ext. Cost' column are highlighted with red circles.

Line #	Item	Description	Ext. Cost	Adjustment 1	Tax	Adjustment 2	Total Cost	Cost Code	Cost Type	Cost Period	Phase
001	000041	003 00 00 Cont	\$10,000.00	\$0.00	\$0.00	\$0.00	\$10,000.00	01-003-003 00 00	-- Select --	Select Period...	-- Select --
002	000063	005 00 00 Meta	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00	01-005-005 00 00	-- Select --	Select Period...	-- Select --
			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00				

Add Commitment Details

- Select “Addenda” tab and “Add Addenda”

The screenshot displays the PMWeb software interface. The main window shows the 'Commitments' section for 'ALBERICI CONSTRUCTORS INC - 002'. The 'Addenda' tab is selected in the bottom navigation bar. A blue arrow points to the 'Add Addenda' button in the toolbar. The interface includes a left sidebar with navigation options, a top navigation bar, and a main content area with various form fields and tables.

Table: Costs

Costs	Days
Original Value	\$15,000.00 0.00
Approved Changes	\$15,000.00 0.00
Revised Value	\$30,000.00 0.00
Billed	\$1,000.00
Retained	\$200.00
Balance Due	\$800.00
Payments Applied	\$0.00
Open Balance	\$800.00
Unbilled	\$29,000.00 0.00
Pending Changes	\$0.00 0.00
Projected Value	\$30,000.00 0.00

Table: Addendum Details

Line #	Paragraph	Category	Addendum N	Number of Pages	Responsible	Date	Days To Start	End	Days To End	Notes
No records to display										

Add Commitment Details

- Drag over the folder of the agreement type of the commitment
- Save

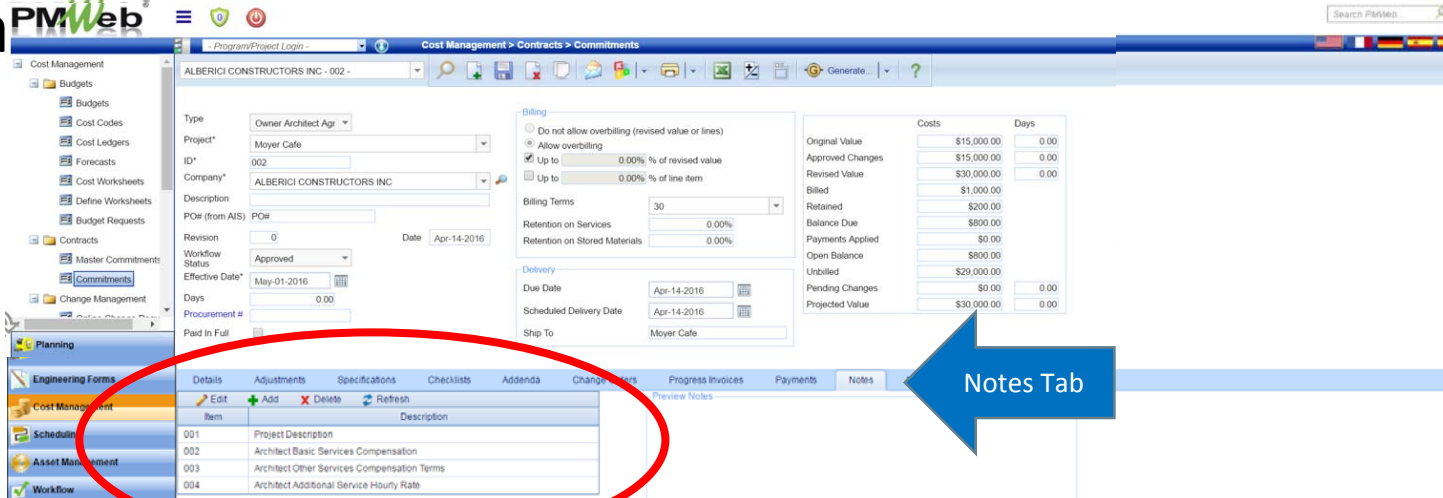
The screenshot shows the PMWeb interface with the 'Select Addenda' dialog box open. The dialog box has a 'Group By' dropdown set to 'Category'. A red circle highlights the 'Architect Agreement' folder in the left pane. Another red circle highlights the table within the dialog box, which contains the following data:

Paragraph	Category	Type	Addendum No.	Number of Pa.	Responsible	Date	End	Notes
	Architect Agre	Revision Spe	Special Condi	N/A				
Exhibit A	Architect Agre	Exhibit	Allowable Rei	Allowable Rei				

A third red circle highlights the 'Save' button at the bottom right of the dialog box.

Add Commitment Details

- Select “Notes” tab;
- You will populate these notes with details that will populate the contract appropriately

- 

Add Commitment Details

- Select a note; select edit
- The note will open in a window (next page)
 - Complete all notes

The screenshot displays the PMWeb software interface. The main window shows commitment details for 'ALBERICI CONSTRUCTORS INC - 002'. The interface includes a left-hand navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, and Workflow. The 'Cost Management' section is expanded, showing options for Budgets, Contracts, and Commitments. The 'Commitments' section is selected, displaying a form with fields for Type, Project*, ID*, Company*, Description, PO#, Revision, Date, Workflow Status, Effective Date*, Days, Procurement #, and Paid In Full. The form also includes sections for Billing (Do not allow overbilling, Allow overbilling, Billing Terms, Retention on Services, Retention on Stored Materials) and Delivery (Due Date, Scheduled Delivery Date, Ship To). A table on the right shows costs and days for various items. At the bottom, a table lists commitment items with columns for Item, Description, and a 'Notes (4)' tab. A blue arrow points to the 'Notes (4)' tab, labeled 'Notes Tab'. The 'Edit' button in the table is circled in red.

Item	Description
001	Project Description
002	Architect Basic Services Compensation
003	Architect Other Services Compensation Terms
004	Architect Additional Service Hourly Rate

Add Commitment Details

- Delete any placeholder in the message box
- Add details to correlate with each Note header; save
 - E.g., Add the “Project Description” to that note

The screenshot displays the PMWeb software interface. The main window shows the 'Commitments' section for 'ALBERICI CONSTRUCTORS INC - 002'. The form includes fields for 'Type' (Owner Architect Agr), 'Project*' (Moyer Cafe), 'ID*' (002), 'Company*' (ALBERICI CONSTRUCT), 'Revision' (0), 'Workflow Status' (Draft), 'Effective Date*' (May-01-2016), 'Days' (0.00), and 'Procurement#' (0.00). A table of commitment items is visible at the bottom of the form:

Item	Description
001	Project Description
002	Architect Basic Services
003	Architect Other Services
004	Architect Additional Services

A secondary window titled 'Notes - Google Chrome' is open, showing a text editor for a note. The URL is 'https://wustldev.pmweb.com/pmweb/DocumentNotesEditor.aspx'. The note content reads: 'This is a test project for the Moyer Cafe. All the details in this project are for test purposes only.' The 'Design' button in the bottom toolbar of the note editor is circled in red.

Add Commitment Details

- Select “Specifications” tab
- Select Contract Signatures tab

The screenshot displays the PMWeb software interface. The left sidebar shows a navigation menu with categories like Cost Management, Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main window is titled 'ALBERICI CONSTRUCTORS INC - 002 -' and shows a form for adding commitment details. The 'Specifications' tab is selected, and a blue arrow points to it with the text 'Specifications Tab'. Below the tabs, there are sections for 'Contract Signatures' and 'MBE/WBE Participation Targets'. The 'Contract Signatures' section has a table with columns for 'Spec', 'UOM', and 'Data'. The 'MBE/WBE Participation Targets' section has an 'Edit' button.

Original Value	Costs	Days
\$15,000.00	\$15,000.00	0.00
\$15,000.00	\$15,000.00	0.00
\$30,000.00	\$30,000.00	0.00
\$1,000.00	\$1,000.00	
\$200.00	\$200.00	
\$800.00	\$800.00	
\$0.00	\$0.00	
\$800.00	\$800.00	
\$29,000.00	\$29,000.00	
\$0.00	\$0.00	0.00
\$30,000.00	\$30,000.00	0.00

Spec	UOM	Data
Owner Signer Name		
Owner Signer Title		
Vendor Signer Name		
Vendor Signer Title		

Add Commitment Details

- Use shortcut: select top row; shift; bottom row; edit
- Enter Owner Signer Name and title
 - NOTE: This will typically be the Director of Capital Projects
- Enter Vendor Signer Name and title (the person authorized to sign the contract); Update Records

The screenshot shows a software interface with a navigation bar at the top containing tabs: Details, Adjustments, Specifications, Checklists, Addenda, Change Orders, Progress Invoices, Payments, Notes, Attachments, Workflow, and Notifications. Below this is a 'Custom Fields' section with a grid of tabs: Contract Signatures, Architect Agreement, Commitment Review Checklist, Consulting Agreement, Continuing Services Agreement, Engineer Agreement, GMP, GMP Amendment, and Short Form Agreement. Under 'Contract Signatures', there are sub-tabs: Stipulated Sum Agreement and MBE/WBE Participation Targets. A blue bar contains 'Update Records' and 'Cancel' buttons, with 'Update Records' circled in red. Below this is a table with columns: Spec, UOM, Data, and Notes. The table has four rows: Owner Signer Name, Owner Signer Title, Vendor Signer Name, and Vendor Signer Title. Each row has input fields for the 'Data' column and a small icon in the 'Notes' column.

Add Commitment Details

- Select “Specifications” tab and select tab for appropriate type of agreement
- Populate details here just like for a resolution

The screenshot displays the PMWeb software interface. The main window is titled 'ALBERICI CONSTRUCTORS INC - 002 -' and shows the 'Commitments' section. A blue arrow points to the 'Specifications' tab, which is highlighted in red. The 'Specifications' tab contains a table with columns for 'Contract Signer', 'Agreement Type', 'UOM', 'Data', and 'Notes'. The table is currently empty. A red oval highlights the 'Specifications' tab and the table below it.

Specifications tab

Contract Signer	Agreement Type	UOM	Data	Notes

Add Commitment Details

- Use shortcut: select top row; shift; bottom row; edit
- Add contract details

The screenshot displays the PMWeb software interface for managing contract commitments. The main window shows the 'Commitments' section for 'ALBERICI CONSTRUCTORS INC - 002'. The contract details include:

- Type: Owner Architect Agr
- Project*: Moyer Cafe
- ID*: 002
- Company*: ALBERICI CONSTRUCTORS INC
- Description: [Empty]
- PO# (from AIS): [Empty]
- Revision: 0
- Workflow Status: Approved
- Effective Date*: May-01-2016
- Days: 0.00
- Procurement #: [Empty]
- Date: Apr-14-2016

The 'Billing' section includes options for overbilling and retention percentages. The 'Delivery' section shows the due date and scheduled delivery date as Apr-14-2016.

Costs	Days
Original Value	\$15,000.00 0.00
Approved Changes	\$15,000.00 0.00
Revised Value	\$30,000.00 0.00
Billed	\$1,000.00
Retained	\$200.00
Balance Due	\$900.00
Payments Applied	\$0.00
Open Balance	\$900.00
Unbilled	\$29,000.00
Pending Changes	\$0.00 0.00
Projected Value	\$30,000.00 0.00

The bottom section shows a table of 'Custom Fields' for the contract, including various participation targets and percentages.

Spec	UOM	Data	Notes
(note added) Project Description			
3.6.2 Weekly Site Visit Hours			0.00
8.1.1 (note added) Architect Basic Services Comp			
8.1.2 (note added) Architect Other Services Compensation Terms			
8.1.3 Schematic Design Percentage			0.00
8.1.3 Design Development Percentage			0.00
8.1.3 Construction Development Percentage			0.00
8.1.3 Bidding or Negotiation Percentage			0.00
8.1.3 Construction Percentage			0.00
8.1.4 (note added) Architect Additional Service Hourly Rate			
9.2.1.1 Architect Reimb Multiplier			0.00

Add Commitment Details

- Each line that has “(note added)” indicates a note that needs to be completed for this commitment
- Click the checkbox to denote that a note was added; add any notes that have not yet been added
- Select “Update Records” to save

The screenshot displays a software interface for managing commitments. At the top, there are fields for 'Days' (0.00), 'Procurement' (0.00), 'Paid In Full' (checkbox), 'Due Date' (Apr-14-2016), 'Scheduled Delivery Date' (Apr-14-2016), 'Ship To' (Moyer Cafe), 'Pending Changes' (\$0.00), and 'Projected Value' (\$15,000.00). Below these are tabs for 'Details', 'Adjustments', 'Specifications', 'Checklists', 'Clauses (2)', 'Change Orders', 'Progress Invoices', 'Payments', 'Notes (4)', 'Attachments (1)', and 'Notifications'. A 'Custom Fields' section includes 'Update Records' (circled in red), 'Cancel', and 'Spec'. The main table has columns for 'Spec', 'UCM', 'Data', and 'Notes'. The 'Notes' column contains checkboxes, with one circled in red. The table rows include items like '3.0.2 Weekly Site Visit Hours' and '8.1.1 (note added) Architect Basic Services Comp'.

Spec	UCM	Data	Notes
3.0.2 Weekly Site Visit Hours			0.00
8.1.1 (note added) Architect Basic Services Comp			<input type="checkbox"/>
8.1.2 (note added) Architect Other Services Compensation Terms			<input type="checkbox"/>
8.1.3 Schematic Design Percentage			0.00
8.1.3 Design Development Percentage			0.00
8.1.3 Construction Development Percentage			0.00
8.1.3 Bidding or Negotiation Percentage			0.00
8.1.3 Construction Percentage			0.00
8.1.4 (note added) Architect Additional Service Hourly Rate			<input type="checkbox"/>
8.2.1.1 Architect Reimb Multiplier			0.00

Generate Commitment Report

- Save the record
- Navigate to the printer icon drop down, and select BI reporting.

The screenshot displays the PMWeb software interface for generating a commitment report. The main window shows the 'Commitments' section for 'ALBERICI CONSTRUCTORS INC - 002'. The interface includes a navigation pane on the left, a central form area, and a summary table on the right.

Navigation Pane (Left):

- Cost Management
 - Budgets
 - Cost Codes
 - Cost Ledgers
 - Forecasts
 - Cost Worksheets
 - Define Worksheets
 - Budget Requests
- Contracts
 - Master Commitments
 - Commitments
- Change Management
- Planning
- Engineering Forms
- Cost Management
- Scheduling
- Asset Management
- Workflow
- Portfolio

Main Form Area (Center):

Project: Moyer Cafe
ID: 002
Company: ALBERICI CONSTRUCTORS INC
Description: POI (from AIS)
Revision: 0
Workflow Status: Approved
Effective Date: May-01-2016
Days: 0.00
Procurement #:
Paid In Full:
Date: Apr-14-2016

Summary Table (Right):

	Original Value	Costs	Days
Original Value	\$15,000.00		0.00
Approved Changes	\$15,000.00		0.00
Revised Value	\$30,000.00		0.00
Billed	\$1,000.00		
Retained	\$200.00		
Balance Due	\$800.00		
Payments Applied	\$0.00		
Open Balance	\$800.00		
Unbilled	\$29,000.00		
Pending Changes	\$0.00		0.00
Projected Value	\$30,000.00		0.00

Custom Fields (Bottom):

Contract Signatures	Architect Agreement	CM w/GMP	Commitment Review Checklist	Consulting Agreement	Continuing Services Agreement	Engineer Agreement	Short Form Agreement	Stipulated Sum Agreement
MBE/WBE Participation Targets								

Generate Commitment Report

- Select appropriate contract type – click magnifying glass
- Then select Report Viewer to view entire report

The screenshot displays the PMWeb software interface. The main window shows contract details for 'ALBERICI CONSTRUCTORS INC - 002'. A 'Reports Preview' dialog box is open, listing various report types. The 'CONTR: Architect Agreement' report is highlighted. The 'Report Viewer' button at the bottom of the dialog is circled in red. The background window shows a table with columns for 'Cost Type', 'Cost Period', and 'Phase'.

Report	Record Type	Selected
Commitment Form	Commitments	<input checked="" type="checkbox"/>
Commitment Log (by Cost Code)	Commitments	<input type="checkbox"/>
Commitment Log (by Vendor)	Commitments	<input type="checkbox"/>
Commitment Log by Project	Commitments	<input type="checkbox"/>
Commitments	Commitments	<input type="checkbox"/>
CONTR: Architect Agreement	Commitments	<input checked="" type="checkbox"/>
CONTR: Constr Mgr w/GMP	Commitments	<input type="checkbox"/>
CONTR: Consulting Services	Commitments	<input type="checkbox"/>
CONTR: Continuing Services	Commitments	<input type="checkbox"/>
CONTR: Engineer Agreement	Commitments	<input type="checkbox"/>

Generate Commitment Report

- Review commitment for correctness; make any changes necessary in spec fields and rerun the report
 - Note: use arrows to navigate if multiple pages
 - Note: page 3 contains info from spec fields; other pages contain information from the addenda attachments

The screenshot displays the PMweb software interface. The main window shows a commitment report for 'Moyer Cafe' under the project 'ALBERICI CONSTRUCTORS INC - 002'. The report details include:

- Type: Owner Architect Agr
- Project: Moyer Cafe
- ID: 002
- Company: ALBERICI CONSTRUCTORS INC
- Revision: 0
- Workflow Status: Draft
- Effective Date: May-01-2016
- Days: 0.00
- Procurement#: Paid In Full

The report also shows a table with columns for Cost Type, Cost Period, and Phase, with values of 0.00 and 0.00.

Overlaid on the software is a browser window showing the report preview. The browser address bar displays: <https://wustldev.pmweb.com/pmweb/ReportPrintingPreview.aspx>. The report content includes the Washington University in St. Louis logo and the title 'Architect Agreement'. The text of the agreement states: 'THIS AGREEMENT is made effective as of this 1st day of May in the year of 2016. BETWEEN Owner: THE WASHINGTON UNIVERSITY On behalf of the School of Medicine Washington University School of Medicine 660 South Euclid Avenue Campus Box 8034 St. Louis, Missouri 63110'.

Generate Commitment Report

- Commitment contracts will be submitted through workflow as an attachment to the commitment record
- Save the commitment as a PDF to a central drive.

Project: Moyer Cafe Commitment: 002 - ALBERICI CONSTRUCTORS INC -

1 of 4 Find | Next

Washington University

Architect Agreement

THIS AGREEMENT is made effective as of this 1st day of May in the y

BETWEEN Owner:

THE WASHINGTON UNIVERSITY
On behalf of the School of Medicine
Washington University School of Medicine
660 South Euclid Avenue
Campus Box 8034

XML file with report data
CSV (comma delimited)
PDF
MHTML (web archive)
Excel
TIFF file
Word

Generate Commitment Report

- Select “Attachments” tab and then “Select” button
- Upload the saved commitment document here

The screenshot displays a software interface with a file selection dialog box overlaid on top. The dialog box shows a list of files and folders in a directory structure: Maria Moyer > Box Sync > PMWeb-Project Team > 03 Design > Reporting. The file list includes folders like 'Cap Plan Report emails and notes' and 'Current Copies of WUSM DAN reports', and various Excel and Acrobat files such as 'AP Invoice Detail Report sample', 'Budget multiple projects sample report', and 'Commitment CO'. The 'File name' field is empty, and the 'File type' is set to 'All Files'. The 'Open' button is highlighted.

Below the dialog box, the software interface shows a navigation pane on the left with 'Attachments (1)' selected. The main area displays a table with the following data:

	Costs	Days
Original Value	\$15,000.00	0.00
Approved Changes	\$0.00	0.00
Revised Value	\$15,000.00	0.00
Billed	\$0.00	
Retained	\$0.00	
Balance Due	\$0.00	
Payments Applied	\$0.00	
Open Balance	\$0.00	
Unbilled	\$15,000.00	
Pending Changes	\$0.00	0.00
Projected Value	\$15,000.00	0.00

At the bottom of the interface, there is a 'Quick File Upload' section with a text box and a 'Select' button. The text above the button reads: 'Select multiple files to upload or drop files in the box below'.

Submit Commitment Report into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot displays the PMWeb software interface for 'ALBERICI CONSTRUCTORS INC - 002'. The left sidebar shows a navigation menu with 'Workflow' selected. The main window is divided into several sections: 'Type' (Owner Architect Agr), 'Project*' (Moyer Cafe), 'ID*' (002), 'Company*' (ALBERICI CONSTRUCTORS INC), 'Description', 'PO#', 'Revision' (0), 'Date' (Apr-14-2016), 'Workflow Status' (Approved), 'Effective Date*' (May-01-2016), 'Days' (0.00), and 'Procurement #'. The 'Billing' section includes options for 'Do not allow overbilling', 'Allow overbilling', and 'Up to' percentages. The 'Billing Terms' is set to 30. The 'Delivery' section includes 'Due Date' (Apr-14-2016), 'Scheduled Delivery Date' (Apr-14-2016), and 'Ship To' (Moyer Cafe). A table on the right shows 'Costs' and 'Days' with values for Original Value, Approved Changes, Revised Value, Billed, Retained, Balance Due, Payments Applied, Open Balance, Unbilled, Pending Changes, and Projected Value. A blue arrow points from the 'Workflow' tab in the bottom navigation bar to the 'Workflow' tab in the main window. The 'Workflow Actions' section includes buttons for 'Approve', 'Return', 'DO NOT USE', 'Withdraw (ends workflow)', 'Final Approve', and 'Delegate', along with a 'Submit' button. The 'Email Preview' section includes fields for 'Subject' and 'Email Body', and a 'Comments' section.

Submit Commitment Report into Workflow

- Select Save
 - You will receive notification re: the status of the workflow

The screenshot displays a software interface for managing commitments. On the left is a navigation sidebar with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main area shows a form for a commitment with fields for Status (Submitted), Effective Date (May-17-2016), Days (0.00), Procurement #, and Paid In Full. There are also sections for Delivery details (Due Date, Scheduled Delivery Date, Ship To) and Open Orders (Unbilled, Pending Changes, Projected Value). Below the form is a 'Workflow Actions' section with a list of actions: Approve, Return, DO NOT USE, Withdraw (ends workflow), Final Approve, Delegate, and Team Input (0). The 'Team Input (0)' button is circled in red. Other sections include Email Preview, Comments, and Instructions. A 'Save' button is located at the bottom of the 'Team Input' section.

Commitment Vendor step in Workflow

- The commitment workflow has a step for the commitment vendor
- You can see in the workflow log every step in the workflow. The PM will receive the “commitment vendor” step and delegate it to the vendor.

	1		<input checked="" type="checkbox"/>	May-21-2016	Project Manager 1	Jon Smith		
	2				-- APM --	Commitment < \$50k		
	2.1		<input type="checkbox"/>	May-26-2016	Accountant 1	Emily Follman	Approve after PO is keyed in Marketplace	
	2.2				-- APM --	Non PO Commitment		
	2.2.1		<input type="checkbox"/>	May-31-2016	Commitment Vendor	Emily Follman		
	2.2.2		<input type="checkbox"/>	Jun-05-2016	Project Manager 1	Jon Smith		
	3				-- APM --	Commitment between \$50k & \$80k		
	3.1				-- APM --	Non PO Commitment		
	3.1.1		<input type="checkbox"/>	Jun-10-2016	Commitment Vendor	Emily Follman	Delegate to appropriate vendor contact for this commitment.	

Commitment Vendor Role

Commitment Vendor step in Workflow

- Select “Delegate” radio button
- Select the delegate from the list in the pop up window
- Save the assignment and save the workflow step

The screenshot displays a software interface with a 'Delegate Step' dialog box. In the background, the 'Workflow Actions' section has the 'Delegate' radio button selected, indicated by a blue arrow labeled 'Select Delegate'. The 'Delegate Step' dialog box is open, showing a list of users to delegate to. The 'Save' button in the dialog box is circled in red. The dialog box contains the following information:

- Step: 2.2.1 - Commitment Vendor
- Approver: 1353539958 - Emily Follman
- Current Delegate: -- None --
- Delegate To: jones - Sam Jones
- Delegate All of My Steps:
- Alert Delegate:
- Message:

The list of users to delegate to includes:

- AUSER - Any User
- charles - Charles Charles
- emily - Emily Follman
- emily2 - Emily Rhody
- jones - Sam Jones
- kardos - John Kardos
- KLassus - Karen Lassus
- mbaver - Melissa Baver

The dialog box also shows a 'Save' button and a 'Cancel' button. The 'Save' button is circled in red. The dialog box is titled 'Delegate Step' and has a 'Save' button and a 'Cancel' button. The background interface shows a 'Workflow' tab and a 'Business Process' section.

Commitment Vendor step in Workflow

- Vendors may choose not to use PMWeb
- In this case, the PM will not delegate to the vendor, but will instead email the commitment document to the vendor for signature.
- When the signed document is returned via email, the PM will add the document to the record in PMWeb and approve it as a proxy for the vendor, sending the record on to the next step in workflow

Final Signature

- After vendor has returned the signature page of the contract (either via email or PMWeb attachment, the WU final approver/designated signatory needs to add signature to signature page
- This will be done manually for now
- Electronic signatures are coming
 - Opt in/out will be required to be performed for each esign (WU and vendor)

Final Signature

- Print page, WU signer will sign, and scan
- Upload to commitment record as attachment
- Save record

The screenshot displays a software interface with a left-hand navigation menu and a main content area. The navigation menu includes: Planning, Engineering Forms, Cost Management (highlighted), Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main content area shows a workflow step (Step 5 of 5) with tabs for Details, Adjustments, Specifications, Checklists, Addenda, Change Orders, Progress Invoices, and Payments. A 'Paid In Full' checkbox is present. A 'Ship To' field contains 'EMILY Testing vendor security'. Below the tabs, there are buttons for 'Save' (circled in red), 'Cancel', and 'Download Files'. A table with columns 'Description*' and 'File*' is visible. A yellow highlighted section contains a 'Commitment XXX Signature page' and radio button options: Document Manager, Link, SharePoint, Aconex, Email, and Upload (selected). A 'Browse...' button and 'Commitment X..' text are also present. At the bottom, there is a page number '1' and 'Page Size 20'. The footer includes the logo for 'ington nSt.Louis TECHNOLOGY'.

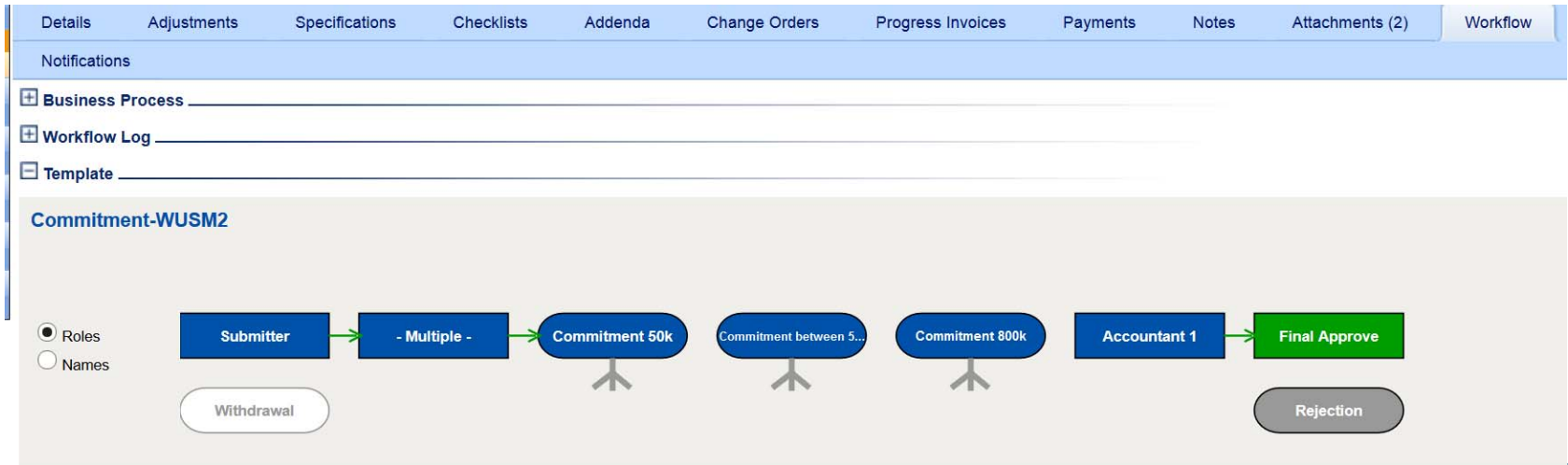
Final Approval

- Final approver will review commitment and select final approve
- Save
- Commitment is fully executed

The screenshot displays a software interface with a top navigation bar containing tabs: Details, Adjustments, Specifications, Checklists, Addenda, Change Orders, Progress Invoices, Payments, Notes, Attachments (1), and Workflow (Step 5 of 5). The 'Workflow (Step 5 of 5)' tab is active. Below the navigation bar, there are three main panels. The leftmost panel, titled 'Workflow Actions', is circled in red and contains a list of actions: Approve, Return, DO NOT USE, Withdraw (ends workflow), Final Approve (which is selected with a radio button), and Delegate. Below this list is a 'Team Input (0)' section and a 'Save' button. The middle panel is titled 'Email Preview' and contains fields for 'Subject' and 'Email Body', a 'Comments' text area, and an 'Add CC' field. The rightmost panel is titled 'Instructions' and is currently empty.

Final Approval

- Visual workflow will show that the record has completed final approval



PMWeb® Training

Budget Requests – Resolution Increase

Start with a new Estimate

- Same process as initial budget – start with an estimate
- Two ways to navigate to Estimate module
 - Planning Module > Estimates sub-category

The screenshot displays the PMWeb software interface. The top navigation bar shows 'Planning > Estimates'. The left sidebar contains a tree view with 'Estimates' and 'Planning' highlighted by blue arrows. The main area features a table with columns: Project Name, Project #, Record #, Description, Work Status, Unit, Reference, Category, and Revision #. A red circle highlights the 'Add' button in the top toolbar. The table contains various project records, including 'KLL Pedestrian Walkway', 'Maternity Bldg Ob/Gyn', and 'East Bldg 3rd Floor Psy'.

Project Name	Project #	Record #	Description	Work Status	Unit	Reference	Category	Revision #
KLL Pedestrian Walkway	KLL1234	000020	KLL Pedestrian Walkway Rep	Approved	1.00			0
KLL Pedestrian Walkway	KLL1234	000027	Revised Estimate	Draft	1.00			0
Maternity Bldg Ob/Gyn	2015576y	000052	Approved Budget	Approved	1.00			0
New Resolution Test (D	KMH 16056	000126	Eggnog	Approved	1.00			0
New Resolution Test (D	KMH 16056	000127	Eggnog Increase	Approved	1.00			0
New Resolution Test (D	KMH 16056	000129	estimate paste	Draft	1.00			0
New Resolution Test (D	KMH 16056	000130	fefe	Approved	1.00			0
East Bldg 3rd Floor Psy	16055	000149	East 3 Psychiatry Reno - Inc	Draft	1.00		sf	0
For Testing Change Orc	TEMPINT06	000140	For Testing CO's, First Attem	Approved	1.00			0
For Testing Change Orc	TEMPINT06	000143	Delete	Draft	1.00			0
Sidewalk Repair 2015 PI	16058	000145	budget	Approved	1.00			0
Justin 123015	TEMPINT08	000141	Program Estimate	Draft	1.00			0
Taylor Avenue Building	16060	000142	General Medical Sciences an	Withdrawn	2,250.00			1
Taylor Avenue Building	16060	000146	General Medical Sciences an	Approved	11,463.00			0
McDonnell Sci.Basemen	16061	000144	originally this project included	Approved	9,750.00	52-3425-85338		0
HMH FCUs	JAF004	000147	Budget Testing (Escape Roo	Approved	70,000.00			0
HMH FCUs	JAF004	000148	Adding to the estimate (Escap	Approved	1.00			0
Forecast Test	16066	000150	Forecast Test Estimate	Approved	1.00			0
Forecast Test	16066	000158	estimate test	Approved	1.00			0

Create New Estimate for additional funds

- Two ways to navigate to Estimate module
 - Project Center > Select Estimates hyperlink

The screenshot displays the PMWeb software interface. The main window title is "Planning > Estimates". The "Project Center" is active for "Moyer Cafe". The "Navigator" on the right lists various project components, with "Estimates" circled in red. Below the Navigator, there are sections for "Engineering Forms" and "Cost Management". A table at the bottom right shows project budget details.

Debt Funded				Project Status Updates		Square Footage	
Planning and Project Request Form				LEED Information		Project Ratings	
Project Date Tracking				Admin Use Only			
Edit							
Spec:	UOM	Data					
Does Project Include a Move							
Weekly Status Update							
Plan for Next Week							
Issues and Risks Identified							
Total Project Budget							\$0.00

Create new estimate

- You will be brought to a new estimate record

The screenshot shows the PMWeb software interface. The left sidebar contains a navigation menu with the following items: Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main window title is 'Planning > Estimates'. The top toolbar includes a search icon, a plus icon, a printer icon, a save icon, a delete icon, a refresh icon, a BIM icon, an import icon, and a generate icon. The form area contains the following fields:

- Project*:
- Revision: Date:
- Description*:
- Category:
- Reference:
- Workflow Status:
- Estimate unit of measure:
- Estimate units:
- Cost/Unit:
- Price/Unit:

Below the form is a table with the following columns: Line #, Assembly, Item, Resource, Resource Type, BIM ID, Description, Mfr. #, Manufacturer, Phase, Cost Code, Type, Bid Category, and UOM. The table currently displays 'No records to display.'

Create new estimate

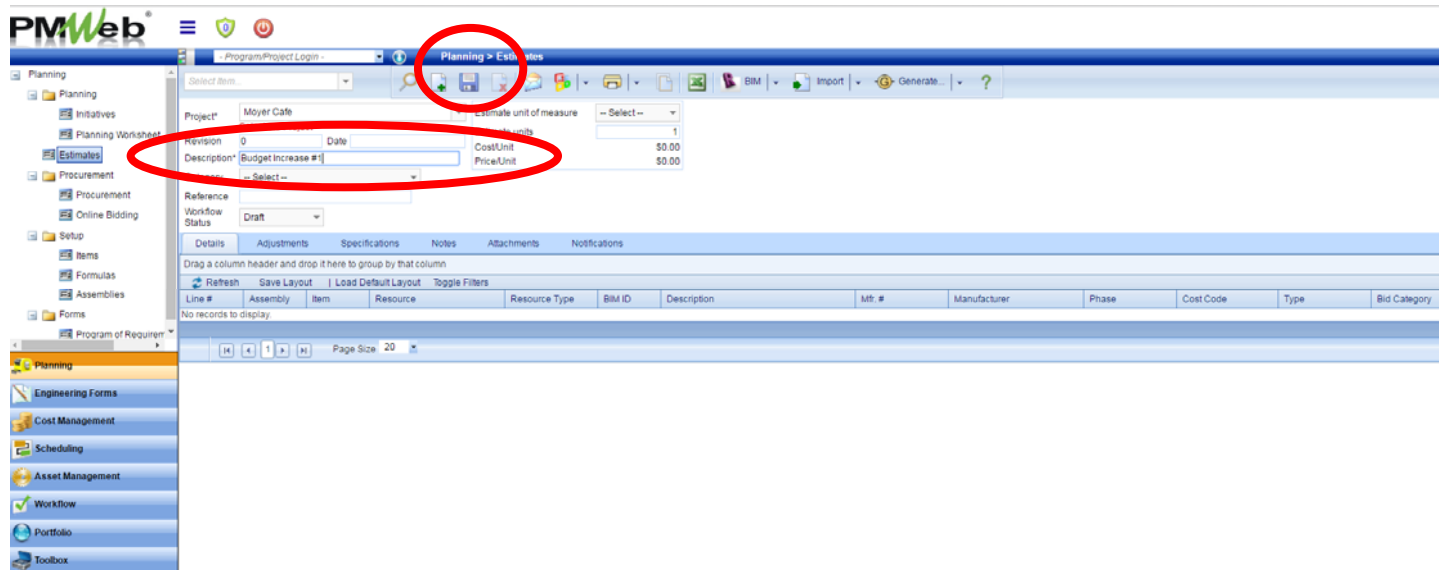
- Select your project from the list

The screenshot shows the PMWeb software interface. A blue arrow points to the 'Estimates' button in the left sidebar, with the text 'Select project' next to it. The main window displays a form for creating a new estimate. The 'Project' dropdown is set to 'mvm' and the description is 'MVM Test Script Development'. The interface includes a top navigation bar, a left sidebar, and a main content area with a table for items.

Resource Type	BIM ID	Description	Mfr. #	Manufacturer	Phase

Create new estimate

- Enter Estimate Description (only required field) and save the record



Create new estimate

- Two ways to add cost codes and unit prices to your estimate
 - Details tab > Add Items

The screenshot displays the PMWeb software interface. The left sidebar contains a navigation menu with the 'Details' tab highlighted. A blue arrow points from the text 'Details tab' to the 'Details' tab in the sidebar. The main window shows the 'Estimates' section for a project named 'Moyer Cafe - Budget Incr'. The 'Details' tab is active, and the 'Add Items' button is circled in red. Below the 'Add Items' button is a table with columns: Line #, Assembly, Resource, Resource Type, BIM ID, Description, Mfr #, Manufacturer, Phase, Cost Code, Type, and Bid Category. The table currently contains no records.

Create new estimate

- From the “items” window, drag and drop the relevant cost codes into your estimate. Save.

The screenshot displays the PMWeb software interface. The main window is titled "Items" and contains a table of cost codes. A red circle highlights the "Save" button in the top-left corner of the window. The table lists various items with their descriptions, phases, cost codes, types, quantities, and unit costs.

#	Item	Description	Phase	Cost Code	Type	Quantity	Unit Cost
1	000046	000 00 00 Procurement		01-000-000 00 00		1	0.00
1	000050	001 00 00 General Requirements		01-001-001 00 00		1	0.00
1	000052	002 00 00 Existing Con		01-002-002 00 00		1	0.00
1	000041	003 00 00 Concrete		01-003-003 00 00		1	0.00
1	000056	004 00 00 Masonry		01-004-004 00 00		1	0.00
1	000063	005 00 00 Metals		01-005-005 00 00		1	0.00
1	000066	006 00 00 Woods, Plac		01-006-006 00 00		1	0.00
1	000074	007 00 00 Thermal and Moisture Protection		01-007-007 00 00		1	0.00
1	000092	008 00 00 Openings		01-008-008 00 00		3	0.00
1	000101	009 00 00 Finishes		01-009-009 00 00		1	0.00
1	000119	010 00 00 Specialties		01-010-010 00 00		1	0.00
1	000126	011 00 00 Equipment		01-011-011 00 00		1	0.00
1	000130	012 00 00 Furnishings		01-012-012 00 00		1	0.00

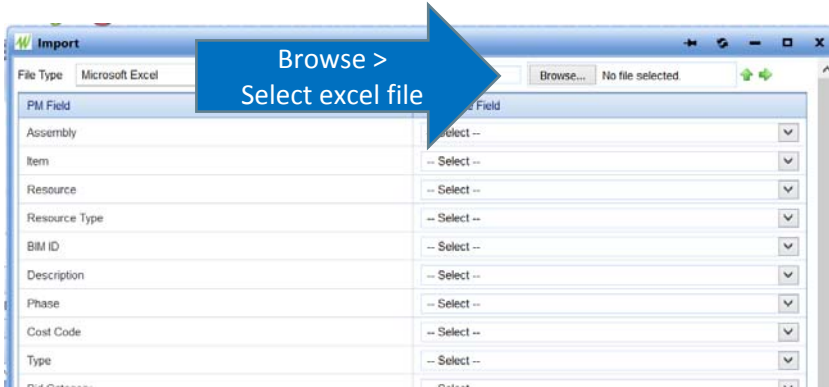
Create new estimate

- Two ways to add cost codes and unit prices to your estimate
 - Complete the estimate in an Excel template and upload

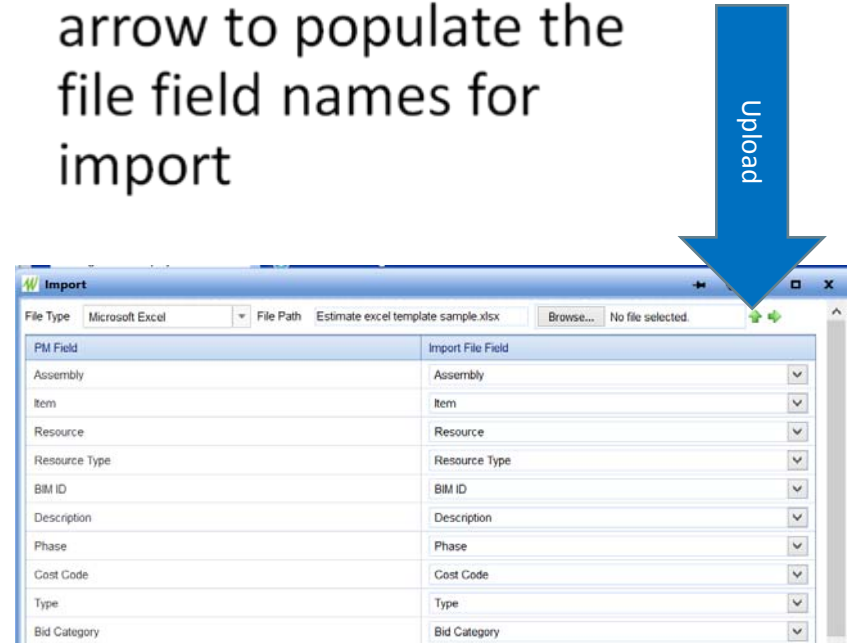
The screenshot displays the PMWeb software interface. The top navigation bar shows 'Assign workflow project' and 'Planning > Estimates'. The left sidebar contains a tree view with 'Estimates' selected. The main content area features a form for creating an estimate with fields for Project, Revision, Date, Description, Category, Reference, and Workflow Status. Below the form are tabs for 'Details', 'Adjustments', 'Specifications', 'Notes', 'Attachments', and 'Notifications'. A table with columns for Line #, Assembly, Item, Resource, Resource Type, BIM ID, Description, Mfr. #, and Manufacturer is visible, though it currently shows 'No records to display'. A blue arrow points to the 'Import > Estimate Detail' button in the top right toolbar.

Create new estimate

- Browse to select the Excel file

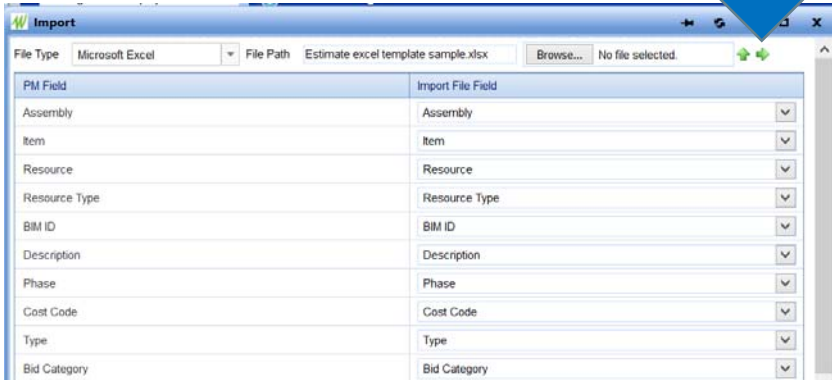


- Select the green upload arrow to populate the file field names for import



Create new estimate

- Arrow to the next page to view detail



Next page

- Save the uploaded items

Import

Assembly	Item	Resource	Resource Type	BIM ID	Description	Phase	Cost Code
<input checked="" type="checkbox"/>	000050	0		0	01 00 00 General Requirements	0	0
<input checked="" type="checkbox"/>	000055	0		0	02 40 00 Demolition and Structure Moving	0	0
<input checked="" type="checkbox"/>	000038	0		0	02 60 00 Contaminated Site Material	0	0
<input checked="" type="checkbox"/>	000040	0		0	02 80 00 Facility Remediation	0	0
<input checked="" type="checkbox"/>	000041	0		0	03 00 00 Concrete	0	0
<input checked="" type="checkbox"/>	000058	0		0	04 00 00 Masonry	0	0
<input checked="" type="checkbox"/>	000063	0		0	05 00 00 Metals	0	0
<input checked="" type="checkbox"/>	000069	0		0	06 00 00 Woods, Plastics, and Composites	0	0
<input checked="" type="checkbox"/>	000074	0		0	07 00 00 Thermal and Moisture Prot	0	0
<input checked="" type="checkbox"/>	000092	0		0	08 00 00 Openings	0	0
<input checked="" type="checkbox"/>	000101	0		0	09 00 00 Finishes	0	0
<input checked="" type="checkbox"/>	000119	0		0	10 00 00 Specialties	0	0
<input checked="" type="checkbox"/>	000126	0		0	11 00 00 Equipment	0	0
<input checked="" type="checkbox"/>	000135	0		0	12 00 00 Furnishings	0	0
<input checked="" type="checkbox"/>	000139	0		0	13 00 00 Special Construction	0	0

Create new estimate

- Saving the import will populate your items into the estimate. Save the record.

The screenshot shows the PMWeb software interface. The left sidebar contains a navigation menu with the following items: Planning, Initiatives, Planning Worksheet, Estimates, Procurement, Procurement, Online Bidding, Setup, Items, Formulas, Assemblies, Forms, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main window is titled 'Assign workflow project' and shows a form for 'Estimates'. The form includes fields for Project*, Revision, Date, Description*, Category, Reference, Workflow Status, Estimate units, Estimate units, Cost/Unit, and Price/Unit. The 'Import' button in the toolbar is circled in red. Below the form is a table with columns: Line #, Assembly, Item, Resource, Resource Type, BIM ID, Description, Mt. #, and Manufacturer. The table contains 16 rows of data.

Line #	Assembly	Item	Resource	Resource Type	BIM ID	Description	Mt. #	Manufacturer
001		000050			0	01 00 00 General Requirements		
002		000055			0	02 40 00 Demolition and Structure Moving		
003		000038			0	02 80 00 Contaminated Site Material Removal		
004		000040			0	02 80 00 Facility Remediation		
005		000041			0	03 00 00 Concrete		
006		000058			0	04 00 00 Masonry		
007		000063			0	05 00 00 Metals		
008		000069			0	06 00 00 Woods, Plastics, and Composites		
009		000074			0	07 00 00 Thermal and Moisture Protection		
010		000092			0	08 00 00 Openings		
011		000101			0	09 00 00 Finishes		
012		000119			0	10 00 00 Specialties		
013		000126			0	11 00 00 Equipment		
014		000135			0	12 00 00 Furnishings		
015		000136			0	13 00 00 Spatial Construction		

Add line item detail (if necessary)

- Edit line items: Highlight the first row, press the Shift key, and select the bottom row to highlight all line items. Select edit. All items available to edit.

The screenshot displays the PMWeb software interface. The main window shows a table of line items for a project named 'Moyer Cafe'. The table has columns for Line #, Assembly, Item, Resource, Resource Type, BIM ID, Description, Mt. #, Manufacturer, Phase, Cost Code, Type, and Bid Category. The first row (Line # 001) is highlighted in orange. The 'Edit' button in the toolbar is circled in red. The toolbar also includes buttons for 'Add Assembly', 'Add Resource(s)', 'Add', 'Delete', 'Refresh', 'Paste From Excel', 'Save Layout', 'Load Default Layout', and 'Toggle Filters'.

Line #	Assembly	Item	Resource	Resource Type	BIM ID	Description	Mt. #	Manufacturer	Phase	Cost Code	Type	Bid Category
001		000049				000 00 00 Procurement and Contracting Req				01-000-000 00 00		
002		000050				001 00 00 General Requirements				01-001-001 00 00		
003		000052				002 00 00 Existing Conditions				01-002-002 00 00		
004		000041				003 00 00 Concrete				01-003-003 00 00		
005		000058				004 00 00 Masonry				01-004-004 00 00		
006		000063				005 00 00 Metals				01-005-005 00 00		
007		000069				006 00 00 Woods, Plastics, and Composites				01-006-006 00 00		
008		000074				007 00 00 Thermal and Moisture Protection				01-007-007 00 00		
009		000092				008 00 00 Openings				01-008-008 00 00		
010		000101				009 00 00 Finishes				01-009-009 00 00		
011		000119				010 00 00 Specialties				01-010-010 00 00		
012		000126				011 00 00 Equipment				01-011-011 00 00		
013		000135				012 00 00 Furnishings				01-012-012 00 00		
014		000139				013 00 00 Special Construction				01-013-013 00 00		
015		000145				014 00 00 Conveying Equipment				01-014-014 00 00		

Add line item detail (if necessary)

- Add unit costs
- Save by selecting “Update Records”

The screenshot shows the PMWeb software interface. The main window is titled 'Planning > Estimates'. The left sidebar contains a navigation menu with items like Planning, Initiatives, Estimates, Procurement, Setup, Items, Formulas, Assemblies, Forms, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main area displays a form for '000290 - Assign workflow project - E'. The form includes fields for Project, Revision, Date, Description, Category, Reference, and Workflow Status. Below the form is a table with columns: Line #, Assembly, Item, Description, Quantity, Ext. Quantity, Unit Cost, Ext. Cost, Adjustment 1, Tax, Adjustment 2, and Total Cost. The 'Update Records' button is circled in red. The table contains 7 rows of data.

Line #	Assembly	Item	Description	Quantity	Ext. Quantity	Unit Cost	Ext. Cost	Adjustment 1	Tax	Adjustment 2	Total Cost
001		000050	01 00 00 General Requirements	1.00	1.00	\$50.00	\$50.00	\$0.00	\$0.00	\$0.00	\$50.00
002		000055	02 40 00 Demolition and Structure Moving	1.00	1.00	\$5,344,532.00	\$5,344,532.00	\$0.00	\$0.00	\$0.00	\$5,344,532.00
003		000038	02 00 00 Contaminated Site Material Removal	1.00	1.00	\$4,356.00	\$4,356.00	\$0.00	\$0.00	\$0.00	\$4,356.00
004		000040	02 80 00 Facility Remediation	1.00	1.00	\$43,234.00	\$43,234.00	\$0.00	\$0.00	\$0.00	\$43,234.00
005		000041	03 00 00 Concrete	1.00	1.00	\$8,785.00	\$8,785.00	\$0.00	\$0.00	\$0.00	\$8,785.00
006		000058	04 00 00 Masonry	1.00	1.00	\$7,500.00	\$7,500.00	\$0.00	\$0.00	\$0.00	\$7,500.00
007		000063	05 00 00 Metals	1.00	1.00	\$4,848.00	\$4,848.00	\$0.00	\$0.00	\$0.00	\$4,848.00

Approve and save Estimate

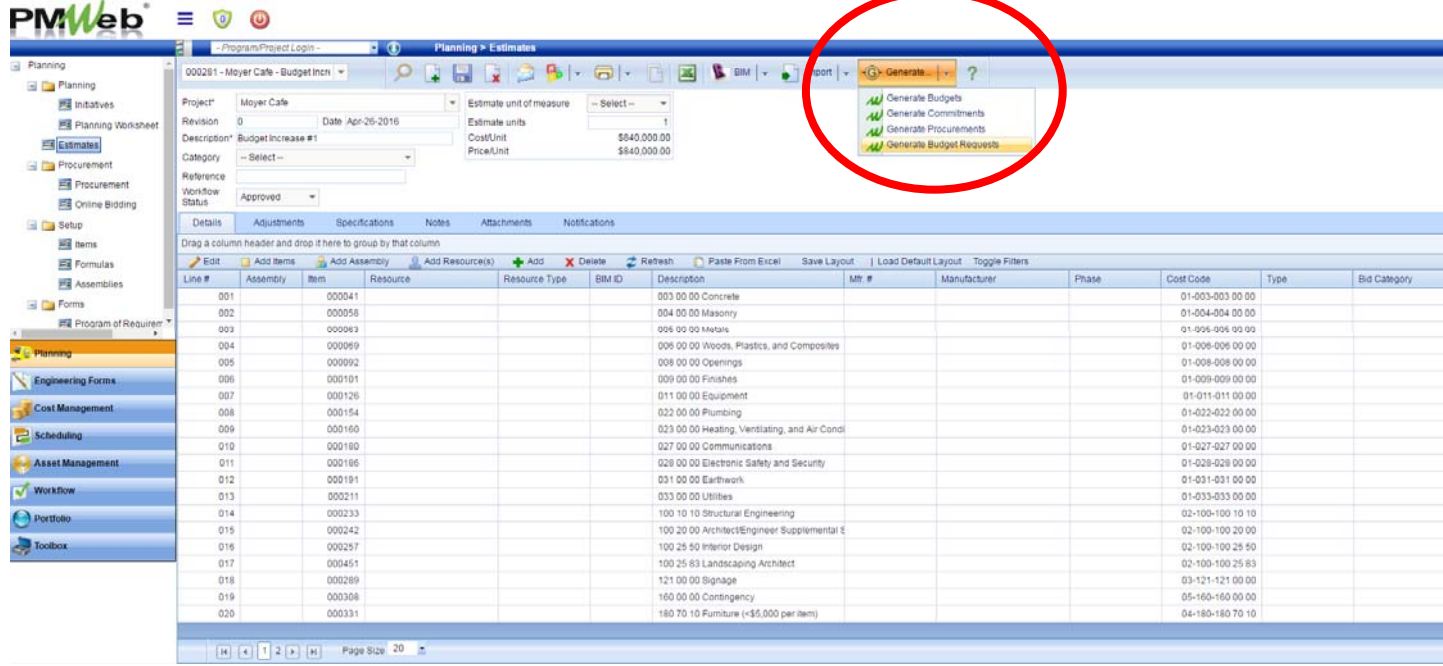
- Once Estimate is complete, change workflow status to “Approved” and save the record

The screenshot displays the PMWeb software interface. The main window shows the 'Estimate' form for '000255 - Moyer Cafe - Estimate #1'. The 'Workflow Status' dropdown menu is open, showing 'Approved' selected. A blue arrow labeled 'Save' points to the 'Save' button in the top toolbar. Another blue arrow labeled 'Workflow status > Approved' points to the 'Approved' option in the dropdown menu. The left sidebar shows the navigation menu with 'Planning' selected. The bottom table shows the following data:

Line #	Approved	Rejected	Withdrawn	Resource	Resource Type	BIM ID	Description	Mfr. #	Manufacturer	Phase	Cost Code	Type	Bid Category
001				000050			001 00 00 General Requirements				01-001-001 00 00		

Generate Budget Requests

- Resolution Increase is always associated with budget requests record
- Select Generate dropdown, select Generate Budget Requests



The screenshot displays the PMWeb software interface. The top navigation bar includes the PMWeb logo and a menu icon. The main window title is 'Planning > Estimates'. The left sidebar shows a tree view of project management tools, with 'Planning' selected. The central area contains a form for project details, including 'Project: Moyer Cafe', 'Revision: 0', 'Date: Apr-26-2016', and 'Description: Budget Increase #1'. A red circle highlights the 'Generate' dropdown menu, which is open and shows four options: 'Generate Budgets', 'Generate Commitments', 'Generate Procurements', and 'Generate Budget Requests'. The 'Generate Budget Requests' option is highlighted in yellow. Below the form is a table with columns for Line #, Assembly, Item, Resource, Resource Type, BIM ID, Description, MT #, Manufacturer, Phase, Cost Code, Type, and Bid Category. The table contains 20 rows of data, including items like 'Concrete', 'Masonry', 'Metals', 'Woods, Plastics, and Composites', 'Openings', 'Finishes', 'Equipment', 'Plumbing', 'Heating, Ventilating, and Air Conditioning', 'Communications', 'Electronic Safety and Security', 'Earthwork', 'Utilities', 'Structural Engineering', 'Architect/Engineer Supplemental', 'Interior Design', 'Landscaping Architect', 'Signage', and 'Contingency'.

Generate Budget Requests

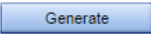
- In the popup window
 - Ensure all cost codes are selected
 - Validate budget request total matches estimate

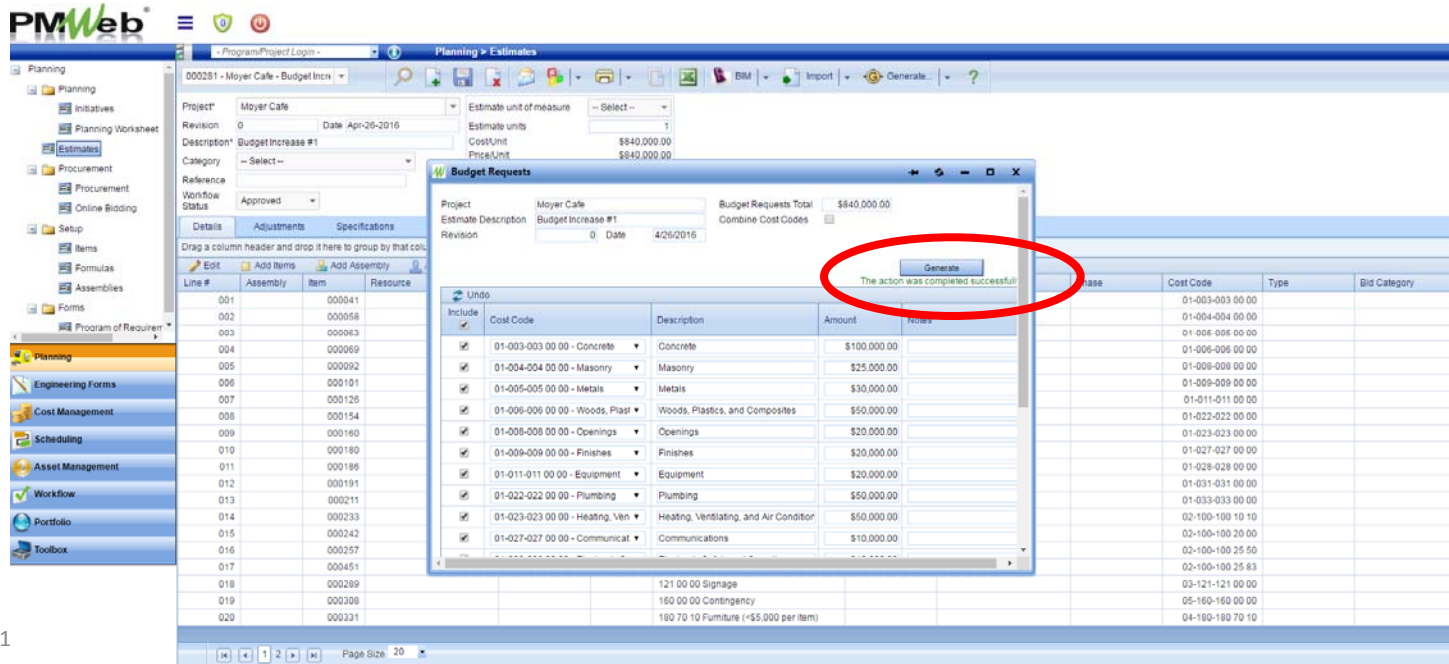
The screenshot shows the PMWeb software interface. The main window displays the 'Estimates' section for a project named 'Moyer Cafe'. A 'Budget Requests' popup window is open, showing a table of cost codes and their amounts. The total amount is \$840,000.00, which matches the estimate. A red circle highlights the 'Budget Requests Total' field, and another red circle highlights the 'Include' column checkboxes.

Line #	Assembly	Item	Resource	Cost Code	Description	Amount	Notes
001		000041					
002		000058					
003		000063					
004		000069					
005		000092					
006		000101					
007		000126					
008		000154					
009		000160					
010		000180					
011		000186					
012		000191					
013		000211					
014		000233					
015		000242					
016		000257					
017		000451					
018		000289					
019		000308					
020		000331					

Phase	Cost Code	Type	Bid Category
	01-003-003 00 00		
	01-004-004 00 00		
	01-005-005 00 00		
	01-006-006 00 00		
	01-008-008 00 00		
	01-009-009 00 00		
	01-011-011 00 00		
	01-023-023 00 00		
	01-023-023 00 00		
	01-027-027 00 00		
	01-028-028 00 00		
	01-031-031 00 00		
	01-033-033 00 00		
	02-100-100 10 10		
	02-100-100 20 00		
	02-100-100 25 83		
	03-121-121 00 00		
	05-160-160 00 00		
	04-180-180 70 10		

Generate Budget Requests

- Select “Generate” button 
- Message will display when record has been generated



The screenshot shows the PMWeb software interface. The main window displays a project named 'Moyer Cafe' with a 'Budget Increase #1' estimate. A 'Budget Requests' dialog box is open, showing a list of items with their descriptions, amounts, and hours. The 'Generate' button is circled in red, and a success message 'The action was completed successfully!' is displayed below it.

Line #	Assembly	Item	Resource	Cost Code	Description	Amount	Hours	Base	Cost Code	Type	Bid Category
001		000041		01-003-003 00 00	Concrete	\$100,000.00			01-003-003 00 00		
002		000058		01-004-004 00 00	Masonry	\$25,000.00			01-004-004 00 00		
003		000063		01-005-005 00 00	Metals	\$30,000.00			01-005-005 00 00		
004		000069		01-006-006 00 00	Woods, Plastics, and Composites	\$50,000.00			01-006-006 00 00		
005		000092		01-008-008 00 00	Openings	\$20,000.00			01-008-008 00 00		
006		000101		01-009-009 00 00	Finishes	\$20,000.00			01-009-009 00 00		
007		000126		01-011-011 00 00	Equipment	\$20,000.00			01-011-011 00 00		
008		000154		01-022-022 00 00	Plumbing	\$50,000.00			01-022-022 00 00		
009		000160		01-023-023 00 00	Heating, Ventilating, and Air Conditioning	\$50,000.00			01-023-023 00 00		
010		000180		01-027-027 00 00	Communications	\$10,000.00			01-027-027 00 00		
011		000186							01-028-028 00 00		
012		000191							01-031-031 00 00		
013		000211							01-033-033 00 00		
014		000233							02-100-100 10 10		
015		000242							02-100-100 20 00		
016		000257							02-100-100 25 50		
017		000451							02-100-100 25 83		
018		000289		121 00 00	Signage				03-121-121 00 00		
019		000308		160 00 00	Contingency				05-160-160 00 00		
020		000331		180 70 10	Furniture (+\$5,000 per item)				04-180-180 70 10		

Add Funding Source to Budget Request

- Two ways to navigate to Funding Records module
 - Cost Management > Funding Records sub-category

The screenshot shows the PMWeb interface. On the left sidebar, a blue arrow labeled 'Funding Records' points to the 'Funding Records' option under the 'Funding' folder. Another blue arrow labeled 'Cost Management' points to the 'Cost Management' option under the 'Planning' folder. The main window displays the '190 - Maria's Cafe - Estimate #1 - Rev # 0' form. The form includes fields for Project (Maria's Cafe), Revision (0), Date (Mar-15-2016), Estimate (223 - Estimate #1 - Revision 0), and Description (Estimate #1). Below the form is a table with columns for Resolution, Project Roles, UCM, Data, and Notes. The table contains several rows of data, including 'Purpose of Project', 'Scope of Work', 'Projects Committee Date', 'Buildings and Grounds Committee Date', 'Medical Finance Committee Date', 'Architect', 'Architect Justification', 'Architect: "Other" Justification', 'Engineer', 'Engineer Justification', 'Engineer: "Other" Justification', 'Contractor', 'Contractor Justification', 'Contractor: "Other" Justification', 'Minimum Percentage of On Site MBE/WBE Participation', 'Minimum Percentage of Minority Enterprise Participation', 'Borrowing Source', and 'Plant or Project Fund'.

Add Funding Source to Budget Request

- Two ways to navigate to Funding Records module
 - Project Center > Select Funding Records hyperlink

The screenshot displays the PMWeb software interface. The left sidebar contains a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The 'Cost Management' section is expanded, showing sub-items such as Budgets, Cost Codes, Cost Ledgers, Forecasts, Cost Worksheets, Define Worksheets, Budget Requests, Contracts, Master Commitments, Commitments, Change Management, and Online Change Request. The 'Budgets' sub-item is selected, leading to a 'Project Center' view. The main content area shows a 'Draft' workflow status and various budget-related fields. A table on the right lists 'Record Type' with columns for 'Pending' and 'Approved'. The 'Funding Records' entry is circled in red, showing 1 Pending and 0 Approved records. Other record types include Action Items, Correspondence, Daily Reports, Drawing Lists, Drawing Sets, Meeting Minutes, Online Submittals, Punch Lists, RFIs, Safety Forms, Submittal Sets, Submittal Items, Transmittals, and Emergency Form. Below this, there are sections for 'Cost Management', 'Scheduling', and 'Asset Management', each with their own 'Record Type' tables. The 'Funding Records' table is as follows:

Record Type	Pending	Approved
Funding Records	1	0

Add Funding Source to Budget Request

- Add a new funding record or select your project from the board

The screenshot displays the PMWeb interface for 'Cost Management > Funding > Funding Records'. The 'Projects' dropdown menu is highlighted with a red circle, and the 'Add' button is also circled in red. The table below shows various funding records with columns for Program, Project Name, Code, Record #, Description, Workflow Status, Reference, Category, Revision #, and Revision.

Program	Project Name	Code	Record #	Description	Workflow Status	Reference	Category	Revision #	Revision
Portfolio		ORIGFUND	000025	Original Funding for Danforth	Draft			0	Jan-15-2
Portfolio		ORIGFUND	000026	Original Funding for WUSM	Draft			0	Jan-15-2
		FY17CAPPLAN	000027	2017 Cap Plan - not global	Approved		Resolution Increase	0	Jan-15-2
			000029	Funding	Draft			0	Jan-19-2
			000030	Funding	Draft			0	Jan-19-2
			000031	Funding	Draft		Resolution	0	Jan-20-2
			000032	Danforth Cap Plan school f	Draft			0	Jan-20-2
			000033	TEST - funding by school	Approved			0	Jan-20-2
			000034		Draft			0	Jan-22-2
			000035		Approved			0	Jan-22-2
			000036	Cost Allocation	Draft			0	Jan-26-2
			000037		Approved			0	Jan-26-2
			0035-1		Draft			1	Jan-27-2
			0035-2	Resolution approved 01/05/	Approved			0	Jan-27-2
			0035-5	Resolution increase	Approved			0	Jan-29-2
			0035-6	Testing Resolution increase	Draft		Resolution	0	Jan-29-2
			0035-7	Testing resolution increase	Draft		Resolution Increase	0	Jan-29-2
			0035-8	resolution increase testing	Draft		Resolution Increase	0	Jan-29-2
			Original		Draft		Resolution	0	Feb-02-2
			Original	Funding	Draft			0	Feb-02-2

Add Funding Source to Budget Request

- Select the “Project” radio button in the “Allocation by” box
- Select your project and save

The screenshot displays the PMWeb application interface for managing funding records. The left sidebar contains a navigation menu with options like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main content area shows the 'Funding Records' form for record 87. The 'Allocation by' section is highlighted with a red oval, showing the 'Project' radio button selected and 'Moyer Cafe' chosen in the dropdown. The 'Add' button is also circled in red. Below the form is a table with columns for Line #, Year, Project, Program, Source, Code, Cost Allocation, WBS, Period, Task, Start, Finish, and Curve. The table currently shows 'No records to display.'

Add Funding Source to Budget Request

- Select “Resolution Increase” in the “Category” field and then click the Save icon in the top header:

The screenshot shows the PMWeb application interface. The top navigation bar includes 'Cost Management' and 'Funding > Funding Records'. A red circle highlights the 'Save' icon in the top header. A blue arrow points to the 'Category' dropdown menu, which is set to 'Resolution Increase'. The 'Category' dropdown is highlighted with a blue arrow and the text 'Category'. The 'Category' dropdown is set to 'Resolution Increase'. The 'Date' field is set to 'Apr-27-2016'. The 'Details' tab is selected, and the table below shows 'No records to display.' The table has columns: Line #, Year, Project, Program, Source, Code, Cost Allocation, WBS, Period, Task, Start, Finish, Curve.

Add Funding Source to Budget Request

- On the “details” tab, select “Add”

The screenshot displays the PMWeb application interface. The left sidebar shows a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main window is titled 'Cost Management > Funding > Funding Records' and shows a form for editing a funding record. The 'Details' tab is selected, and a blue arrow points to it from the left. In the toolbar below the form, the 'Add' button (a green plus sign) is circled in red. The form fields include Year, Funding Source, Code, Records #, Description, Workflow Status, Reference, Category, and Revision. The 'Allocation by' section shows 'Project' selected with 'Moyer Cafe' as the project name. The bottom status bar indicates the user is logged in as 'User' and the database is 'WUSTL'.

Add Funding Source to Budget Request

- In the “Source” field, select the Funding Source
- In the “Cost Allocation” field enter the amount that the source will fund; Save

The screenshot displays the PMWeb interface for 'Cost Management > Funding > Funding Records'. The form fields include Year (None), Funding Source (dropdown), Code, Record # (87), Description (Funding), Workflow Status (Draft), Reference, Category (dropdown), and Revision (0). The table below has columns: Line #, Year, Project, Source, Code, Cost Allocation, WBS, Report, Task, Start, Finish, and Curve. A red circle highlights the 'Save' button in the table toolbar. Two blue arrows point to the 'Source' and 'Cost Allocation' columns. The 'Source' dropdown menu is open, showing a list of funding sources such as '0153-05572 Danforth University Center Reserve' and '0259-68279 Transportation Reserve'.

Add Funding Source to Budget Request

- Once all funding sources have been added, save
 - Note: There may be multiple funding sources for a project, and the Cost Allocation must add up to the budget amount

The screenshot displays the PMWeb interface for managing funding records. The main window shows a form for editing a funding record with the following details:

- Year: (None)
- Funding Source: -- Select --
- Code: [Empty]
- Record #*: 0033
- Description: TEST - funding by school
- Workflow Status: Approved
- Reference: [Empty]
- Category: -- Select --
- Revision: 0
- Date: Jan-20-2016

The 'Allocation by' section shows:

- Portfolio: [None]
- Program: NO WKFLOW - INTEGRATION TE

The table below lists the funding records:

Line #	Year	Project	Program	Source	Code	Cost Allocation	WBS	Period	Task
001		(Program)	NO WKFLOW - INTEG	Sam Fox School Allo		\$2,000,000.00			
002		(Program)	NO WKFLOW - INTEG	Law School Allocation		\$5,000,000.00			
003		(Program)	NO WKFLOW - INTEG	CFU Allocation		\$10,000,000.00			
004		(Program)	NO WKFLOW - INTEG	Brown School Allocation		\$1,000,000.00			
005		(Program)	NO WKFLOW - INTEG	Arts & Sciences Allo		\$15,000,000.00			

Add Funding Source to Budget Request

- Change the funding source workflow status to “Approved” and save
- You are ready to generate a resolution increase.

The screenshot shows the PMWeb interface for the 'Funding Records' page. The 'Workflow Status' dropdown menu is open, showing options: Draft, Submitted, Returned, Resubmitted, Approved, Rejected, and Withdrawn. The 'Draft' option is selected. A red circle highlights the dropdown menu. A blue arrow points to the dropdown with the text 'Workflow status'. The interface includes a navigation menu on the left, a top toolbar, and a data table at the bottom.

Line #	Year	Project	Program	Source	Code	Cost Allocation	WBS	Period	Task	Start	Finish	Curve
001		Moyer Cafe	ATEST1-WUSM	3425-62269 Med Sci		\$840,000.00						

Budget Increase Resolution

- Two ways to navigate to Budget Requests module
 - Project Center > Select Budget Requests hyperlink

The screenshot shows the PMWeb application interface. On the left, a navigation menu is visible with the 'Project Center' item highlighted by a blue arrow. The main content area displays a list of modules under the 'Project Center' tab. The 'Budget Requests' module is circled in red. The interface also shows a search bar at the top right and a welcome message at the top left.

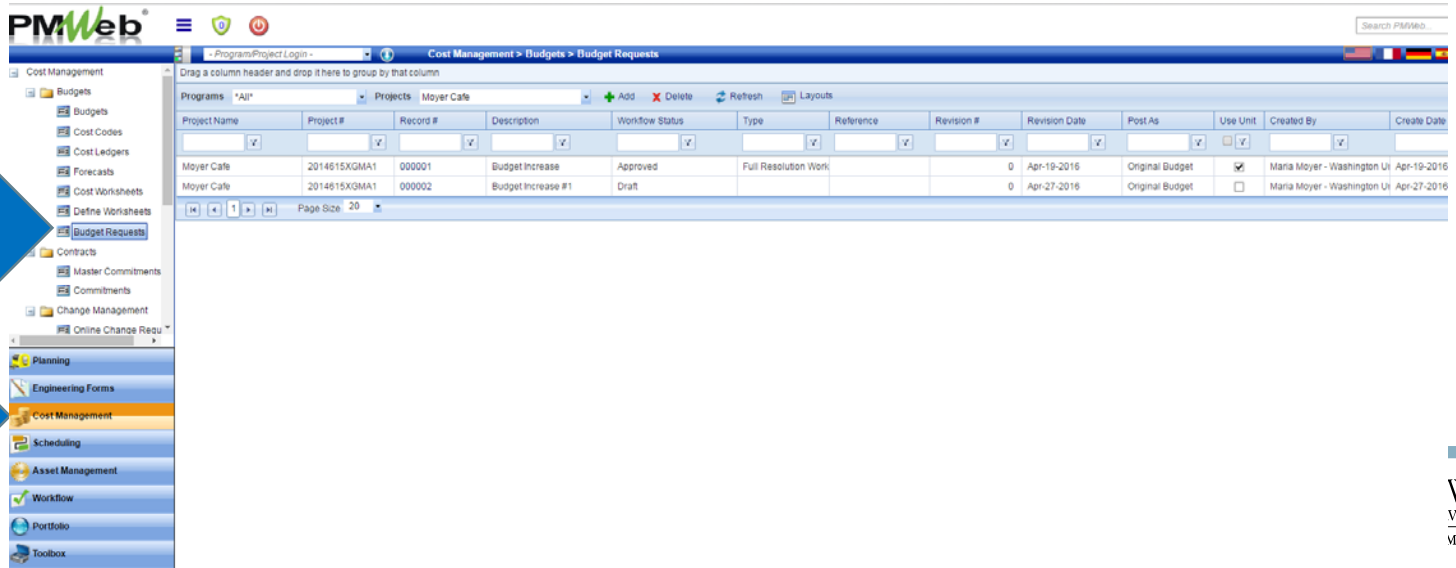
Record Type	Pending	Approved
Budget Requests	1	1
Commitment COs	0	0
Commitments	1	3
Cost Codes	0	1
Forecasts	1	0
Funding Authorizations	0	0
Funding Records	1	2
Funding Requests	0	0
Miscellaneous Invoices	0	0
Online Change Requests	0	0
Progress Invoices	4	0
Commitment Apprentices	0	0

Record Type	Pending	Approved
Project Codes	0	0
Schedules	0	0

Record Type	Pending	Approved
Email Home	0	0
Periods	0	1

Budget Increase Resolution

- Two ways to add navigate to Budget Requests module
 - Cost Management Module > Budget Requests sub-category



The screenshot shows the PMWeb interface with the following table of budget requests:

Project Name	Project #	Record #	Description	Workflow Status	Type	Reference	Revision #	Revision Date	Post As	Use Unit	Created By	Create Date
Moyer Cafe	2014615XGMA1	000001	Budget Increase	Approved	Full Resolution Work		0	Apr-19-2016	Original Budget	<input checked="" type="checkbox"/>	Mania Moyer - Washington U	Apr-19-2016
Moyer Cafe	2014615XGMA1	000002	Budget Increase #1	Draft			0	Apr-27-2016	Original Budget	<input type="checkbox"/>	Mania Moyer - Washington U	Apr-27-2016

6/20/2016

Budget Increase Resolution

- Select the budget record that is in “Draft” mode for the budget increase

The screenshot shows the PMWeb software interface. The main window displays a table of budget requests under the 'Budgets' section. The table has columns for Project Name, Project #, Record #, Description, Workflow Status, Type, Reference, Revision #, Revision Date, Post As, Use Unit, Created By, and Create Date. The record for 'Budget Increase #1' is highlighted with a red circle.

Project Name	Project #	Record #	Description	Workflow Status	Type	Reference	Revision #	Revision Date	Post As	Use Unit	Created By	Create Date
Moyer Cafe	2014615XQMA1	000001	Budget Increase	Approved	Full Resolution Work		0	Apr-19-2016	Original Budget	<input checked="" type="checkbox"/>	Mania Moyer - Washington U	Apr-19-2016
Moyer Cafe	2014615XQMA1	000002	Budget Increase #1	Draft			0	Apr-27-2016	Original Budget	<input type="checkbox"/>	Mania Moyer - Washington U	Apr-27-2016

Budget Increase Resolution

- Validate total “Project Budget” matches estimate that was built.

002 - Moyer Cafe - Budget Increase #1

Project* Moyer Cafe Reference
Record #* 002
Type* - Select -
Description Budget Increase #1
Estimate Budget Increase #1 - 0
Workflow Draft
Status
Revision 0 Date Apr-27-2016
Post As* Original Budget

Line #	Cost Code*	Description	Adjustment 1	Tax	Adjustment 2	Project Budget	Cost Type	Funded	Owner Budget	Company	Phase
001	01-003-003 00 00	Concrete	\$0.00	\$0.00	\$0.00	\$100,000.00		\$0.00	\$100,000.00		
002	01-004-004 00 00	Masonry	\$0.00	\$0.00	\$0.00	\$25,000.00		\$0.00	\$25,000.00		
003	01-005-005 00 00	Metals	\$0.00	\$0.00	\$0.00	\$30,000.00		\$0.00	\$30,000.00		
004	01-000-000 00 00	Woods, Plastics, and	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00	\$50,000.00		
005	01-008-008 00 00	Openings	\$0.00	\$0.00	\$0.00	\$20,000.00		\$0.00	\$20,000.00		
006	01-009-009 00 00	Finishes	\$0.00	\$0.00	\$0.00	\$20,000.00		\$0.00	\$20,000.00		
007	01-011-011 00 00	Equipment	\$0.00	\$0.00	\$0.00	\$20,000.00		\$0.00	\$20,000.00		
008	01-022-022 00 00	Plumbing	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00	\$50,000.00		
009	01-023-023 00 00	Heating, Ventilating,	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00	\$50,000.00		
010	01-027-027 00 00	Communications	\$0.00	\$0.00	\$0.00	\$10,000.00		\$0.00	\$10,000.00		
011	01-028-028 00 00	Electronic Safety and	\$0.00	\$0.00	\$0.00	\$10,000.00		\$0.00	\$10,000.00		
012	01-031-031 00 00	Earthwork	\$0.00	\$0.00	\$0.00	\$5,000.00		\$0.00	\$5,000.00		
013	01-033-033 00 00	Utilities	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00	\$50,000.00		
014	02-100-100 10 10	Structural Engineerin	\$0.00	\$0.00	\$0.00	\$150,000.00		\$0.00	\$150,000.00		
015	02-100-100 20 20	Architect/Engineer Si	\$0.00	\$0.00	\$0.00	\$150,000.00		\$0.00	\$150,000.00		
016	02-100-100 25 50	Interior Design	\$0.00	\$0.00	\$0.00	\$15,000.00		\$0.00	\$15,000.00		
017	02-100-100 25 83	Landscaping Archite	\$0.00	\$0.00	\$0.00	\$5,000.00		\$0.00	\$5,000.00		
018	03-121-121 00 00	Signage	\$0.00	\$0.00	\$0.00	\$10,000.00		\$0.00	\$10,000.00		
019	05-160-160 00 00	Contingency	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00	\$50,000.00		
020	04-180-180 70 10	Furniture (~\$5,000 p	\$0.00	\$0.00	\$0.00	\$15,000.00		\$0.00	\$15,000.00		
			\$0.00	\$0.00	\$0.00	\$840,000.00		\$0.00	\$840,000.00		

Budget Increase Resolution

- In the header of the Budget Request record, select “Full Resolution Workflow” in the Type field and Save
- Select “Specifications” tab to enter resolution specs

The screenshot displays the PMWeb interface for a Budget Request record. The record is titled "002 - Moyer Cafe - Budget Increase #1". The "Type" field is set to "Full Resolution Workflow" and is circled in red. A blue arrow points to this field with the word "Type" written inside. The "Specifications" tab is also circled in red. The interface includes a search bar, navigation tabs, and a sidebar with menu items like "Budgets", "Budget Requests", and "Contracts".

Project*	Moyer Cafe
Record #*	002
Type*	Full Resolution Workflow Required
Description	Budget Increase #1
Estimate	Budget Increase #1 - 0
Workflow Status	Draft
Revision	0
Date	Apr-27-2016
Post As*	Original Budget

Add Resolution Increase Details

- Enter resolution increase details
- Use shortcut: select top row; shift; bottom row; edit
 - All fields available for editing

The screenshot displays a software interface for managing budget requests. On the left is a navigation sidebar with categories such as Forecasts, Cost Worksheets, Define Worksheets, Budget Requests, Contracts, Master Commitments, Commitments, Change Management, and Online Change Request. The main window shows a form for 'Resolution Increase #1'. The form fields include: Description (Budget Increase #1), Estimate (Budget Increase #1 - 0), Workflow (Draft), Status (Draft), Revision (0), Date (Apr-27-2016), and Post As* (Original Budget). Below the form is a table with columns for Spec, UOM, Date, and Notes. The table contains 20 rows of data, each representing a supplier and their role, with dropdown menus for selection and edit icons.

Spec	UOM	Date	Notes
Scope of Work			
Project Committee Date			
Building and Grounds Committee Date			
Medical Finance Committee Date			
Plant or Project Fund		-- Select --	
Supplier1 Vendor		-- Select --	
Supplier1 Role		-- Select --	
Supplier1 Justification			
Supplier2 Vendor		-- Select --	
Supplier2 Role		-- Select --	
Supplier2 Justification			
Supplier3 Vendor		-- Select --	
Supplier3 Role		-- Select --	
Supplier3 Justification			
Supplier4 Vendor		-- Select --	
Supplier4 Role		-- Select --	
Supplier4 Justification			
Supplier5 Vendor		-- Select --	
Supplier5 Role		-- Select --	
Supplier5 Justification			
Supplier6 Vendor		-- Select --	
Supplier6 Role		-- Select --	
Supplier6 Justification			

Add Resolution Increase Details

- Once all relevant fields are populated, select “Update Records”

The screenshot displays a software interface for managing budget requests. On the left is a navigation menu with categories like Budgets, Contracts, and Planning. The main area shows a form for a 'Resolution Increase' with fields for Project#, Record #, Type, Description, Budget Increase #1, Work-flow, Status, Revision, Date, and Post As*. Below the form is a table with columns for Spec, UOM, Date, and Notes. The 'Update Records' button is circled in red.

Spec	UOM	Date	Notes
			This is a test. This is a test.
Project Committee Date		Jun-10-2016	
Building and Grounds Committee Date		Jun-24-2016	
Medical Finance Committee Date			
Plant or Project Fund	Project		
Supplier1 Vendor	A AND N CORPORATION		
Supplier1 Role	General Contractor		
Supplier1 Justification			
Supplier2 Vendor	360 TECHNOLOGIES		
Supplier2 Role	Supplier		
Supplier2 Justification			
Supplier3 Vendor	-- Select --		
Supplier3 Role	-- Select --		
Supplier3 Justification			
Supplier4 Vendor	-- Select --		
Supplier4 Role	-- Select --		
Supplier4 Justification			
Supplier5 Vendor	-- Select --		
Supplier5 Role	-- Select --		
Supplier5 Justification			
Supplier6 Vendor	-- Select --		
Supplier6 Role	-- Select --		

Budget Increase Resolution

- Save the budget request record

The screenshot shows the PMWeb software interface. The main window displays a 'Budget Request' record for 'Moyer Cafe'. The record details include: Record # 002, Type Full Resolution Work, Description Budget Increase #1, Estimate Budget Increase #1 - 0, Workflow Status Draft, Revision 0, Date Apr-27-2016, and Post As Original Budget. A red circle highlights the 'Reference' field in the toolbar. Below the record details is a table with columns: Line #, Cost Code*, Description, Adjustment 1, Tax, Adjustment 2, Project Budget, Cost Type, and Funded. The table contains 10 rows of data for various construction items.

Line #	Cost Code*	Description	Adjustment 1	Tax	Adjustment 2	Project Budget	Cost Type	Funded
001	01-003-003 00 00	Concrete	\$0.00	\$0.00	\$0.00	\$100,000.00		\$0.00
002	01-004-004 00 00	Masonry	\$0.00	\$0.00	\$0.00	\$25,000.00		\$0.00
003	01-005-005 00 00	Metals	\$0.00	\$0.00	\$0.00	\$30,000.00		\$0.00
004	01-006-006 00 00	Woods, Plastics, and	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00
005	01-008-008 00 00	Openings	\$0.00	\$0.00	\$0.00	\$20,000.00		\$0.00
006	01-009-009 00 00	Finishes	\$0.00	\$0.00	\$0.00	\$20,000.00		\$0.00
007	01-011-011 00 00	Equipment	\$0.00	\$0.00	\$0.00	\$20,000.00		\$0.00
008	01-022-022 00 00	Plumbing	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00
009	01-023-023 00 00	Heating, Ventilating, a	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00
010	01-027-027 00 00	Communications	\$0.00	\$0.00	\$0.00	\$10,000.00		\$0.00

Generate Resolution Increase

- Navigate to the printer icon drop down, and select BI reporting.

The screenshot displays the PMWeb software interface. The top navigation bar shows 'Cost Management > Budgets > Budget Requests'. The main window is titled '002 - Moyer Cafe - Budget Increase #1'. The form contains the following fields:

- Project*: Moyer Cafe
- Record #: 002
- Type*: Full Resolution Work
- Description: Budget Increase #1
- Estimate: Budget Increase #1 - 0
- Workflow Status: Draft
- Revision: 0
- Date: Apr-27-2016
- Post As*: Original Budget

A red circle highlights the printer icon dropdown menu, which includes the following options:

- BI Reporting
- PMWeb Reporting
- BI Reporting

The table below shows the cost items for the budget request:

Line #	Cost Code*	Description	Adjustment 1	Tax	Adjustment 2	Project Budget	Cost Type	Funded
001	01-003-003 00 00	Concrete	\$0.00	\$0.00	\$0.00	\$100,000.00		\$0.00
002	01-004-004 00 00	Masonry	\$0.00	\$0.00	\$0.00	\$25,000.00		\$0.00
003	01-005-005 00 00	Metals	\$0.00	\$0.00	\$0.00	\$30,000.00		\$0.00
004	01-006-006 00 00	Woods, Plastic s, and	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00
005	01-008-008 00 00	Openings	\$0.00	\$0.00	\$0.00	\$20,000.00		\$0.00
006	01-009-009 00 00	Finishes	\$0.00	\$0.00	\$0.00	\$20,000.00		\$0.00
007	01-011-011 00 00	Equipment	\$0.00	\$0.00	\$0.00	\$20,000.00		\$0.00
008	01-022-022 00 00	Plumbing	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00
009	01-023-023 00 00	Heating, Ventilating, a	\$0.00	\$0.00	\$0.00	\$50,000.00		\$0.00
010	01-027-027 00 00	Communications	\$0.00	\$0.00	\$0.00	\$10,000.00		\$0.00

Generate Resolution Increase

- Select “Resolution Increase” – click magnifying glass
- Then select Report Viewer to view entire report

The screenshot displays the PMWeb software interface. The main window is titled "002 - Moyer Cafe - Budget Increase #1". A "Reports Preview" window is open, showing a list of reports. The "Resolution Increase" report is selected and highlighted in yellow. The preview window shows the report content, including a table with columns for "Previously Approved", "Increase", and "Total". The "Report Viewer" button is circled in red in the bottom right corner of the preview window.

Previously Approved	Increase	Total
Construction	\$120,000.00	\$440,000.00
Professional Fees	\$0.00	\$320,000.00
Other/Plan Codes	\$0.00	\$10,000.00

Generate Resolution Increase

- Review Resolution Increase for correctness; make any changes necessary in spec fields and rerun the report
 - Note: use arrows to navigate if multiple pages
- Save as PDF

Project: Moyer Cafe Budget Request: 002 - Budget Increase #1 View Report

Project Increase Resolution

Washington University School of Medicine
Moyer Cafe
Project No. 2014615XGMA1

WHEREAS:

This is a test. This is a test.

Previous project approvals:

Date	Amount	Scope
	\$50,000.00	
	\$70,000.00	

The Administration recommends an amount of an increase to the Project in the amount of \$500,000.00 for a

Submit Resolution Increase into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot displays the PMWeb application interface. The top navigation bar shows the breadcrumb path: Cost Management > Budgets > Budget Requests. The main content area is titled "002 - Moyer Cafe - Budget Increase #1". The form fields include: Project* (Moyer Cafe), Record # (002), Type* (Full Resolution Wo), Description (Budget Increase #1), Estimate (Budget Increase #1 - 0), Workflow Status (Draft), Revision (0), Date (Apr-27-2016), and Post As* (Original Budget). Below the form, there are tabs for "Details", "Adjustments", "Workflow", and "Notifications". The "Workflow" tab is selected, and a blue arrow points to it with the text "Workflow tab". Under the "Workflow Actions" section, there are several actions: Approve, Return, DO NOT USE, Withdraw (ends workflow), and Delegate. The "Submit" button is circled in red. The left sidebar shows the navigation menu with "Cost Management" highlighted. The bottom left corner shows the date "6/20/2016". The bottom right corner features the Washington University in St. Louis logo and the text "INFORMATION TECHNOLOGY".

Submit Resolution Increase into Workflow

- Select Save

- You will receive notification re: the status of the workflow

The screenshot shows a software interface for managing workflows. On the left is a sidebar with a tree view containing 'Commitments', 'Change Management', and 'Online Change Request'. Below these are several menu items: 'Planning', 'Engineering Forms', 'Cost Management', 'Scheduling', 'Asset Management', 'Workflow', 'Portfolio', and 'Toolbox'. The 'Workflow' menu item is highlighted. The main content area is divided into several sections. The 'Workflow Actions' section contains a list of actions with radio buttons: 'Approve', 'Return', 'DO NOT USE', 'Withdraw (ends workflow)', 'Final Approve', and 'Delegate'. Below this list are two buttons, 'Save' and 'Cancel', which are circled in red. To the right of the actions is an 'Email Preview' section showing the subject 'PMWeb Approval Request: Budget Requests 002 - Moyer Co' and the email body text: 'A document has been Submitted for approval by Maria Moyer.' Below the email preview is a 'Comments' section and an 'Add CC' field. The 'Business Process' section at the bottom features a 'Refresh' button and a table with the following columns: '#', 'Type', 'All Must Approve?', 'Due Date', 'Role', 'User', 'Delegate', 'Instructions', and 'RAM'. The table contains five rows of data.

#	Type	All Must Approve?	Due Date	Role	User	Delegate	Instructions	RAM
	✓	<input type="checkbox"/>		-- Submitter --				
1	✓	<input type="checkbox"/>		(WUSM) Director of Cap	Steve Sobo			
2	✓	<input type="checkbox"/>		Super User	Admin			
3	✓	<input type="checkbox"/>		(WUSM) Associate Vice	Steve Sobo			
4	✓	<input type="checkbox"/>		Customer	Admin			
5	↔	<input type="checkbox"/>		-- APM --	Prj Target Bud > \$100k			

The logo for PMWeb, featuring the letters 'PM' in black, a green stylized 'W' that overlaps the 'M', and 'eb' in black. A registered trademark symbol (®) is located to the upper right of the 'b'.

PMWeb® Training

Generate Purchase Order

Generate Commitment - PO

- Two ways to navigate to Commitments module
 - Cost Management > Commitments sub-category

The screenshot displays the PMWeb application interface. On the left, a navigation menu lists various modules. Two blue arrows point to specific items: 'Commitments' under the 'Master Commitments' section, and 'Cost Management' under the 'Cost Management' section. The main content area shows a 'Workflow Inbox' table with one record: 'Budget Requests - 001' for '14098 Bernard S Clinical Research Unit - Office and Clinical Renovations', due on 'Apr-03-2016'. Below the table is a 'Notification Inbox' which is currently empty.

Commitments

Cost Management

PMWeb

Welcome back, Marie Meyer, your last login Mar-24-2016 7:19:37 AM

Controls Portfolio View Map View Calendar

RSS Feed

3 Charged With Terrorist Activities in Belgium; Death Toll Rises to 35

Links

- PMWeb

Weather

Weather feed is not available
Please check your internet connection.

Workflow Inbox

Record	Budget Requests - 001	Project/Location	14098 Bernard S Clinical Research Unit - Office and Clinical Renovations	Due	Apr-03-2016
Description	3/14 budget increase test				
Instructions	Progress Step 4 of 9				
Comments	<input type="text"/>				

Notification Inbox

Save Layout Load Default Layout Toggle Filters Dismiss Selected Reminders

ID	Document Type	Project/Location	Due Date	Description
No records to display.				

Generate Commitment - PO

- The Commitments board will display
 - Select “Add” to create a new commitment

The screenshot displays the PMWeb software interface. The main window is titled "Cost Management > Contracts > Commitments". A red circle highlights the "Add" button in the toolbar. The interface includes a left-hand navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main area shows a table of commitments with columns for Project Name, Project #, Record #, Description, Workflow status, Type, Company, Original Value, Change Orders, Billed, Reference, Master, Effective Date, and Procurement #.

Project Name	Project #	Record #	Description	Workflow status	Type	Company	Original Value	Change Orders	Billed	Reference	Master	Effective Date	Procurement #
KLL Pedestrian Walkway Ref	KLL1234	000001	KLL Pedestrian Walkway Ref	Approved	Subcontract	Sample Contractor 3	\$111,250.00	\$0.00	\$500.00	12345		Aug-27-2014	0
KLL Pedestrian Walkway Ref	KLL1234	1196653	MCDONNELL SCI REPLACE	Approved	Purchase Order	8760 ENGINEERING LLC	\$71,100.00	\$0.00	\$0.00	(Encumbrance No.)		Jan-07-2010	0
KLL Pedestrian Walkway Ref	KLL1234	15301252	EAST MCD/CSRB-NTA DCM	Approved	Purchase Order	GRAINGER INC	\$691.79	\$0.00	\$0.00	(Encumbrance No.)		Mar-23-2010	0
KLL Pedestrian Walkway Ref	KLL1234	000002		Draft	Subcontract	12TWENTY INC	\$0.00	\$0.00	\$0.00				
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Renovate 1fl exam room	Approved			\$31,809.00	\$1,002.83	\$32,811.83				0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design fees	Approved	Purchase Order	EISENBERG ARCHITECTS	\$6,050.00	\$-3,110.00	\$2,940.00	3809078M		Dec-16-2014	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000002	asbestos inspection and bulk	Approved	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$195.00	\$600.00	3815326M		Jan-07-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000003	asbestos inspection and bulk	Withdrawn	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$0.00	\$0.00	3815326M		Oct-23-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000004	test commitment for invoice v	Approved	Purchase Order	A AND N CORPORATION	\$0.00	\$0.00	\$0.00	999999		Jan-13-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Eng. serv for retro commissio	Draft	Owner Engineer Agre	8760 ENGINEERING LLC	\$212,000.00	\$0.00	\$0.00			Feb-15-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design modifications to BUC k	Approved	Consulting Services	CANNON DESIGN ARCHIT	\$10,040.00	\$0.00	\$0.00			Jan-10-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000201	carpet, tile and mastic removi	Draft	Continuing Services	CARDINAL ENVIRONMEN	\$35,082.00	\$0.00	\$0.00			Feb-18-2016	0
For Testing Change Orders	TEMPINT06	000001	General Contractor	Approved	Stipulated Sum Agree	CLAYCO CONSTRUCTION	\$872,848.00	\$146,855.00	\$0.00			Jan-01-2016	0
For Testing Change Orders	TEMPINT06	000001	Testing Architectural Agreem	Approved	Owner Architect Agre	MACKEY MITCHELL ARCH	\$190,250.00	\$0.00	\$0.00			Feb-24-2016	0
Sidewalk Repair 2015 Ph2	16058	000001		Approved	Purchase Order	FIXTURE CONTRACTING	\$24,887.00	\$271.00	\$18,868.50				
Taylor Avenue Building 1fl Me	16060	3621495M		Approved	Purchase Order	BSA LIFESTRUCTURES II	\$59,200.00	\$0.00	\$0.00	3621495M			0
Taylor Avenue Building 1fl Me	16060	000002		Approved	Purchase Order	FARMER ENVIRONMENTAL	\$555.00	\$445.00	\$0.00	3630921M			0
Taylor Avenue Building 1fl Me	16060	000003		Approved	Purchase Order		\$4,500.00	\$0.00	\$0.00	3635243M			0
Taylor Avenue Building 1fl Me	16060	000004		Approved	Purchase Order	DUCT SYSTEMS INCORP	\$2,754.57	\$0.00	\$0.00	3643724M			0
Taylor Avenue Building 1fl Me	16060	000005		Approved	Stipulated Sum Agree		\$589,500.00	\$0.00	\$30,000.00				0

Generate Commitment - PO

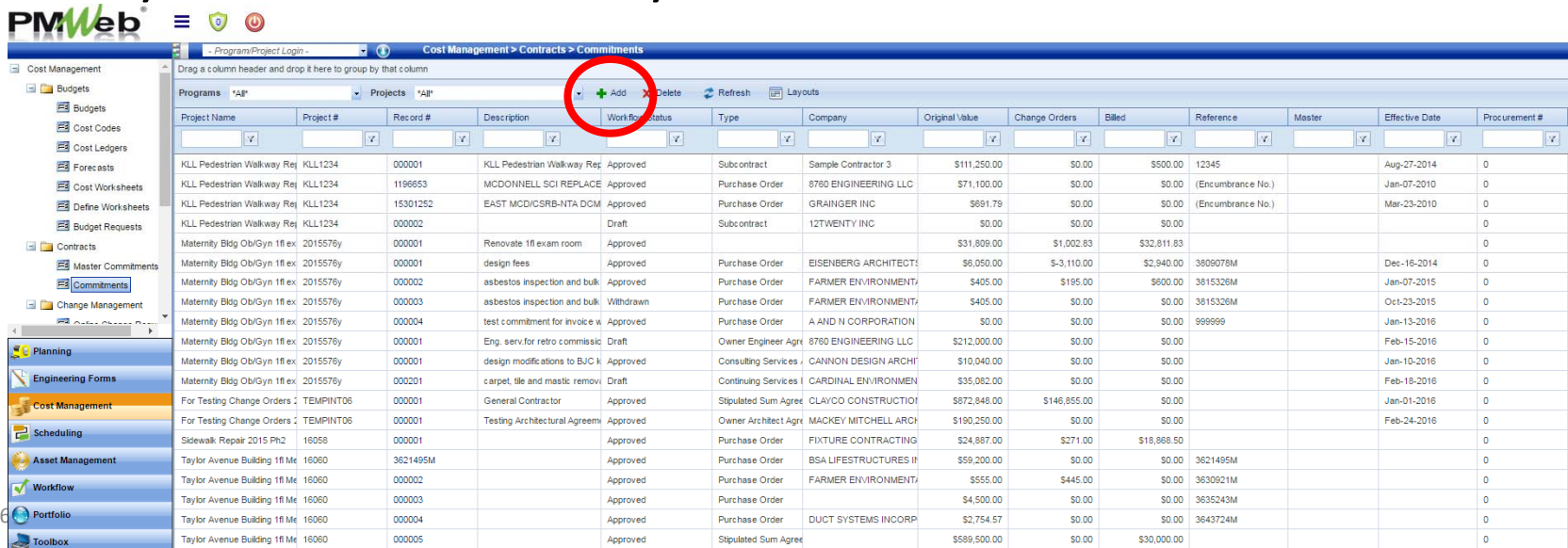
- Two ways to navigate to Commitments module
 - Project Center > Commitments hyperlink

The screenshot shows the PMWeb software interface. A blue arrow points to the 'Project Center' option in the left-hand navigation menu. The main content area displays the 'Project Center' tab, which includes a 'Controls' section with fields for 'Actual Start/Finish', 'Percent Complete' (0.00%), and 'Scope' (This is a test to build a new cafe on WUSM campus.). Below this is a file upload section. The right side of the interface features a table with columns for 'Record Type', 'Pending', and 'Approved'. The 'Commitments' row is circled in red.

Record Type	Pending	Approved
A/P Payments	0	0
Budget Requests	0	0
Budgets	0	1
Commitment COs	0	0
Commitments	1	2
Costs	0	1
Forecasts	0	0
Funding Authorizations	0	0
Funding Records	1	0
Funding Requests	0	0
Miscellaneous Invoices	0	0
Online Change Requests	0	0
Progress Invoices	0	0
Commitment Apprentices	0	0

Generate Commitment - PO

- The Commitments board will display
 - Select “Add” to create a new commitment
 - Note: if the project does not yet have any commitments, you will be taken directly to a new commitment record



The screenshot displays the PMWeb software interface, specifically the 'Commitments' board. The interface includes a navigation sidebar on the left with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main area shows a table of commitments with columns for Project Name, Project #, Record #, Description, Status, Type, Company, Original Value, Change Orders, Billed, Reference, Master, Effective Date, and Procurement #. A red circle highlights the 'Add' button in the top toolbar.

Project Name	Project #	Record #	Description	Status	Type	Company	Original Value	Change Orders	Billed	Reference	Master	Effective Date	Procurement #
KLL Pedestrian Walkway Ref	KLL1234	000001	KLL Pedestrian Walkway Ref	Approved	Subcontract	Sample Contractor 3	\$111,250.00	\$0.00	\$500.00	12345		Aug-27-2014	0
KLL Pedestrian Walkway Ref	KLL1234	1196653	MCDONNELL SCI REPLACE	Approved	Purchase Order	8760 ENGINEERING LLC	\$71,100.00	\$0.00	\$0.00	(Encumbrance No.)		Jan-07-2010	0
KLL Pedestrian Walkway Ref	KLL1234	15301252	EAST MCD/C/SRB-NITA DCM	Approved	Purchase Order	GRAINGER INC	\$691.79	\$0.00	\$0.00	(Encumbrance No.)		Mar-23-2010	0
KLL Pedestrian Walkway Ref	KLL1234	000002		Draft	Subcontract	12TWENTY INC	\$0.00	\$0.00	\$0.00				0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Renovate 1fl exam room	Approved			\$31,809.00	\$1,002.83	\$32,811.83				0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design fees	Approved	Purchase Order	EISENBERG ARCHITECTS	\$6,050.00	\$-3,110.00	\$2,940.00	3080976M		Dec-16-2014	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000002	asbestos inspection and bulk	Approved	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$195.00	\$600.00	3815326M		Jan-07-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000003	asbestos inspection and bulk	Withdrawn	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$0.00	\$0.00	3815326M		Oct-23-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000004	test commitment for invoice w	Approved	Purchase Order	A.A.N.D.N CORPORATION	\$0.00	\$0.00	\$0.00	999999		Jan-13-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Eng. serv for retro commissio	Draft	Owner Engineer Agre	8760 ENGINEERING LLC	\$212,000.00	\$0.00	\$0.00			Feb-15-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design modifications to BJC k	Approved	Consulting Services	CANNON DESIGN ARCHIT	\$10,040.00	\$0.00	\$0.00			Jan-10-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000201	carpet, tile and mastic removi	Draft	Continuing Services	CARDINAL ENVIRONMEN	\$35,082.00	\$0.00	\$0.00			Feb-18-2016	0
For Testing Change Orders	TEMPINT06	000001	General Contractor	Approved	Stipulated Sum Agree	CLAYCO CONSTRUCTION	\$872,848.00	\$146,855.00	\$0.00			Jan-01-2016	0
For Testing Change Orders	TEMPINT06	000001	Testing Architectural Agree	Approved	Owner Architect Agre	MACKEY MITCHELL ARCH	\$190,250.00	\$0.00	\$0.00			Feb-24-2016	0
Sidewalk Repair 2015 Ph2	16058	000001		Approved	Purchase Order	FIXTURE CONTRACTING	\$24,887.00	\$271.00	\$18,868.50				0
Taylor Avenue Building 1fl Me	16060	3621495M		Approved	Purchase Order	BSA LIFESTRUCTURES II	\$59,200.00	\$0.00	\$0.00	3621495M			0
Taylor Avenue Building 1fl Me	16060	000002		Approved	Purchase Order	FARMER ENVIRONMENTAL	\$555.00	\$445.00	\$0.00	3630921M			0
Taylor Avenue Building 1fl Me	16060	000003		Approved	Purchase Order		\$4,500.00	\$0.00	\$0.00	3635245M			0
Taylor Avenue Building 1fl Me	16060	000004		Approved	Purchase Order	DUCT SYSTEMS INCORP	\$2,754.57	\$0.00	\$0.00	3643724M			0
Taylor Avenue Building 1fl Me	16060	000005		Approved	Stipulated Sum Agree		\$589,500.00	\$0.00	\$30,000.00				0

Generate Commitment - PO

- In the “Type” field select PO

The screenshot shows the PMWeb software interface for generating a commitment. The breadcrumb navigation is 'Cost Management > Contracts > Commitments'. The 'Type' dropdown menu is open, showing options: Purchase Order (selected), Subcontract, Purchase Order, CM with GMP, Continuing Services, Project Agreement, Consulting Services Agreement, Owner Architect Agreement, Owner Engineer Agreement, Short Form Agreement, and Stipulated Sum Agreement. A blue arrow points to the 'Type' field, and a red circle highlights the dropdown menu. The 'Billing' section has 'Allow overbilling' selected. The 'Delivery' section has 'Due Date' and 'Scheduled Delivery Date' set to May-30-2016. The 'Costs' table shows various values, including Original Value, Approved Changes, Revised Value, Billed, Retained, Balance Due, Payments Applied, Open Balance, Unbilled, Pending Changes, and Projected Value, all set to \$0.00.

Costs	
Original Value	\$0.00
Approved Changes	\$0.00
Revised Value	\$0.00
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
Projected Value	\$0.00

Generate Commitment - PO

- The ID will be auto-generated
- In the “Company” field, select the vendor

The screenshot displays the PMWeb software interface for generating a commitment. The main window is titled "Cost Management > Contracts > Commitments". The left sidebar shows a navigation tree with "Project" highlighted by a blue arrow. The main form contains the following fields:

- Type: Purchase Order
- Project*: Moyer Cafe
- ID*: Moyer Cafe
- Company*: Moyer Cafe
- Description
- PO# (from AIS)
- Revision
- Workflow Status
- Effective Date*
- Days
- Procurement #
- Paid In Full

The "Billing" section includes:

- Do not allow overbilling (revised value or lines)
- Allow overbilling
- 0.00% % of revised value
- 0.00% % of line item
- Services: 0.00%
- Stored Materials: 0.00%
- Delivery Date: May-30-2016
- Moyer Cafe

The "Costs" table on the right shows the following values:

Costs	Value
Original Value	\$
Approved Changes	\$
Revised Value	\$
Billed	\$
Retained	\$
Balance Due	\$
Payments Applied	\$
Open Balance	\$
Unbilled	\$
Pending Changes	\$
Projected Value	\$

The bottom of the interface shows a table with columns: Line #, Item, Description, Ext. Cost, Adjustment 1, Tax, Adjustment 2, Total Cost.

Generate Commitment - PO

- Select “Effective Date”
 - This date will populate on the contract header
- “Procurement #” field is autopopulated if a bid was involved. Otherwise this field should be NULL

Effective Date

Costs	Day
Original Value	\$0.00
Approved Changes	\$0.00
Revised Value	\$0.00
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
Projected Value	\$0.00

Generate Commitment - PO

- Select “Allow overbilling” radio button and “Up to XX% of the line item”; save record

The screenshot displays the PMWeb software interface for generating a commitment. The main form is titled "Generate Commitment - PO" and is part of the "Cost Management" module. The "Billing" section is highlighted with a red circle, showing the following options:

- Do not allow overbilling (revised value or lines)
- Allow overbilling
 - Up to 0.00% of revised value
 - Up to 0.00% of line item

The "Costs" table on the right shows the following values:

	Costs	Day:
Original Value	\$0.00	
Approved Changes	\$0.00	
Revised Value	\$0.00	
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	
Projected Value	\$0.00	

Add PO Details

- Select “Add items” to add cost codes to the commitment

The screenshot displays the PMWeb software interface for managing commitments. The main window shows details for a Purchase Order (PO) for 'Moyer Cafe' under project '20140014' at 'RHODEY CONSTRUCTION CO INC'. The 'Details' tab is active, and the 'Add Items' button in the table header is circled in red. A blue arrow points to the 'Details' tab in the left sidebar.

PMWeb - Program/Project Login - Cost Management > Contracts > Commitments

RHODEY CONSTRUCTION CO INC - 20140014 -

Type: Purchase Order
Project*: Moyer Cafe
ID*: 20140014
Company*: RHODEY CONSTRUCTION CO INC
Description:
PO# (from AIS): PO#
Revision: 0 Date: May-30-2016
Workflow Status: Draft
Effective Date*: May-30-2016
Days: 0.00
Procurement #:
Paid In Full:

Billing

Do not allow overbilling (revised value or lines)
 Allow overbilling
 Up to 0.00% % of revised value
 Up to 0.00% % of line item

Billing Terms: 10
Retention on Services: 0.00%
Retention on Stored Materials: 0.00%

Delivery

Due Date: May-30-2016
Scheduled Delivery Date: May-30-2016
Ship To: Moyer Cafe

Costs	Day
Original Value	\$0.00
Approved Changes	\$0.00
Revised Value	\$0.00
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
Projected Value	\$0.00

Details Adjustments Specifications Checklists Addenda Change Orders Progress Invoices Payments Notes Attachments Notifications

Drag a column header and drop here to group by that column

Edit **Add Items** Add Delete Refresh Paste From Excel Save Layout Load Default Layout Use Units

Line	Item	Description	Ext. Cost	Adjustment 1	Tax	Adjustment 2	Total Cost
No records to display.							

Add PO Details

- Drag line items into the cost code window
- Save

The screenshot displays a software window titled "Cost Management > Contracts > Commitments" for "ALBERICI CONSTRUCTORS INC - 002 -". The interface includes a left-hand navigation pane with categories like Budgets, Contracts, and Change Management. The main area shows a list of "Typical Cost Codes" on the left and a table of items on the right. A red circle highlights the "Save" button in the top-left corner of the window. Another red circle highlights a row in the table with the following data:

#	Description	Phase	Cost Code	Type	Unit	Unit Cos
1	000041 003 00 00 Concrete	Phase	01-003-003 00 00	Type	1	0.00

Add PO Details

- Cost codes will now appear on “Detail” tab
- Use shortcut: select top row; shift; bottom row; edit
- Enter cost values into the “Ext Cost” field; Update Records

The screenshot displays the PMWeb software interface for managing Purchase Orders. The main window is titled "RHODEY CONSTRUCTION CO INC - 20140014" and shows a form for a "Purchase Order". The form includes fields for Project (Moyer Cafe), ID (20140014), Company (RHODEY CONSTRUCTION CO INC), Description, PO#, Revision (0), Date (May-30-2016), Workflow Status (Draft), Effective Date (May-30-2016), Days (0.00), and Procurement #. There are also sections for Billing (Allow overbilling, Up to 0.00% of revised value, Up to 0.00% of line item) and Delivery (Due Date, Scheduled Delivery Date, Ship To: Moyer Cafe). A summary table on the right shows various cost-related values.

Below the form is a table with the following columns: Line #, Item, Description, Ext. Cost, Adjustment 1, Tax, Adjustment 2, Total Cost, and Cos. The table contains three rows of data:

Line #	Item	Description	Ext. Cost	Adjustment 1	Tax	Adjustment 2	Total Cost	Cos
001	000049	000 00 00 Procurement and	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	01-
002	000050	001 00 00 General require	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	01-
003	000052	002 00 00 Existing Condo	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	01-

Red circles highlight the "Update Records" button in the table's toolbar and the "Ext. Cost" column header.

Add PO Details

- Select “Specifications” tab and select Purchase Orders
- Populate details; save by selecting “Update Records”

Effective Date*

Days

Procurement #

Paid In Full

Delivery

Due Date

Scheduled Delivery Date

Ship To

Unbilled

Pending Changes

Projected Value

Specifications tab

Specifications Checklists Addenda Change Orders Progress Invoices Payments Notes Attachments Workflow Notifications

Custom Fields

Contract Signatures Purchase Orders Architect Agreement CM w/GMP Commitment Review Checklist Consulting Agreement Continuing Services Agreement Engineer Agreement

Short Form Agreement Stipulated Sum Agreement MBE/WBE Participation Targets

Update Records Cancel

Spec	UOM	Data	Notes
Short PO Description			
Payment Terms		-- Select --	
Are start and end dates listed above			
Ship to (if applicable)			
Are there any special terms and conditions			

Add PO details

Submit PO record into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot displays a software interface for managing a Purchase Order (PO) record. The interface is divided into several sections:

- Left Navigation Panel:** Contains various menu items such as "Forecast", "Cost Worksheets", "Define Worksheets", "Budget Requests", "Contracts", "Master Commitments", "Commitments", "Change Management", "Planning", "Engineering Forms", "Cost Management", "Scheduling", "Asset Management", "Workflow", "Portfolio", and "Toolbox". The "Workflow" menu item is highlighted.
- Main Content Area:** Shows details for a PO record for "Maria's Cafe". Fields include ID* (313), Company (ALBERICI CONSTRUCTORS INC), Description, PO# (from AIS), Revision (0), Date (Mar-28-2016), Workflow Status (Draft), Effective Date (Apr-04-2016), Days (0.00), Procurement #, and Paid In Full (checkbox). There are also sections for "Allow overbilling", "Billing Terms" (30), "Retention on Services" (0.00%), "Retention on Stored Materials" (0.00%), "Delivery" (Due Date: Mar-28-2016, Scheduled Delivery Date: Mar-28-2016, Ship To: Maria's Cafe), and a summary table for "Original Items".
- Workflow Actions:** A section with radio buttons for "Approve", "Return", "DO NOT USE", "Withdraw (ends workflow)", "Final Approve", and "Delegate". A "Submit" button is circled in red.
- Workflow Tab:** A blue arrow points to the "Workflow" tab, which is currently selected. Other tabs include "Details", "Adjustments", "Specifications", "Checklists", "Addenda", "Change Orders", "Progress Invo", "Workflow", and "Notifications".
- Email Preview:** A section for "Email Preview" with fields for "Subject", "Email Body", and "Add CC".
- Comments:** A section for "Comments".
- Instructions:** A section for "Instructions".

Submit PO Record into Workflow

- Select Save
 - You will receive notification re: the status of the workflow

The screenshot displays a procurement system interface. On the left is a navigation menu with categories: Planning, Engineering Forms, Cost Management (highlighted), Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main area shows a 'Submitted' record with fields for Effective Date (May-17-2016), Days (0.00), Procurement #, and Paid In Full (checkbox). A 'Delivery' section includes Due Date (May-16-2016), Scheduled Delivery Date (May-16-2016), and Ship To (EMILY Testing vendor security). Below these are tabs for Details, Adjustments, Specifications, Checklists, Addenda, Change Orders, Progress Invoices, Payments, Notes, and Attachments (1). The 'Workflow Actions' section lists various actions with radio buttons: Approve, Return, DO NOT USE, Withdraw (ends workflow), Final Approve, Delegate, and Team Input (0). The 'Team Input (0)' text and the 'Save' button below it are circled in red. Other sections include 'Email Preview' (Subject, Email Body), 'Comments', and 'Instructions'.

The logo for PMWeb, featuring the letters 'PM' in black, a green stylized 'W' that overlaps the 'M', and 'eb' in black. A registered trademark symbol (®) is located to the upper right of the 'b'. The logo is reflected below it.

PMWeb[®] Training

Generate Short Form Agreement

Generate Commitment – Short Form

- Two ways to navigate to Commitments module
 - Cost Management > Commitments sub-category

The screenshot displays the PMWeb application interface. On the left, a navigation menu lists various modules. Two blue arrows point to specific items: 'Commitments' points to the 'Commitments' sub-item under 'Master Commitments', and 'Cost Management' points to the 'Cost Management' item. The main content area shows a 'Workflow Inbox' table with one record: 'Budget Requests - 001' for '14098 Bernard S Clinical Research Unit - Office and Clinical Renovations', due on 'Apr-03-2016'. Below the table is a 'Notification Inbox' which is currently empty.

Record	Budget Requests - 001	Project/Location	14098 Bernard S Clinical Research Unit - Office and Clinical Renovations	Due	Apr-03-2016
Description	3/14 budget increase test				
Instructions	Progress Step 4 of 9				
Comments	<input type="text"/>				

ID	Document Type	Project/Location	Due Date	Description
No records to display.				

Generate Commitment - Short Form

- The Commitments board will display
 - Select “Add” to create a new commitment

The screenshot displays the PMWeb software interface. The top navigation bar shows 'Cost Management > Contracts > Commitments'. Below this, there are filters for 'Programs' and 'Projects', both set to 'All'. A red circle highlights the '+ Add' button. The main area contains a table with the following columns: Project Name, Project #, Record #, Description, WorkFlow Status, Type, Company, Original Value, Change Orders, Billed, Reference, Master, Effective Date, and Procurement #. The table lists various projects, including 'KLL Pedestrian Walkway Ref', 'Maternity Bldg Ob/Gyn 1fl ex', and 'Taylor Avenue Building 1fl Me'.

Project Name	Project #	Record #	Description	WorkFlow Status	Type	Company	Original Value	Change Orders	Billed	Reference	Master	Effective Date	Procurement #
KLL Pedestrian Walkway Ref	KLL1234	000001	KLL Pedestrian Walkway Ref	Approved	Subcontract	Sample Contractor 3	\$111,250.00	\$0.00	\$500.00	12345		Aug-27-2014	0
KLL Pedestrian Walkway Ref	KLL1234	1196653	MCDONNELL SCI REPLACE	Approved	Purchase Order	8760 ENGINEERING LLC	\$71,100.00	\$0.00	\$0.00	(Encumbrance No.)		Jan-07-2010	0
KLL Pedestrian Walkway Ref	KLL1234	15301252	EAST MCD/CSRB-NTA DCM	Approved	Purchase Order	GRAINGER INC	\$691.79	\$0.00	\$0.00	(Encumbrance No.)		Mar-23-2010	0
KLL Pedestrian Walkway Ref	KLL1234	000002		Draft	Subcontract	12TWENTY INC	\$0.00	\$0.00	\$0.00				
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Renovate 1fl exam room	Approved			\$31,809.00	\$1,002.83	\$32,811.83				0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design fees	Approved	Purchase Order	EISENBERG ARCHITECTS	\$6,050.00	\$-3,110.00	\$2,940.00	3809078M		Dec-16-2014	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000002	asbestos inspection and bulk	Approved	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$195.00	\$600.00	3815326M		Oct-29-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000003	asbestos inspection and bulk	Withdrawn	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$0.00	\$0.00	3815326M		Oct-29-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000004	test commitment for invoice v	Approved	Purchase Order	A AND N CORPORATION	\$0.00	\$0.00	\$0.00	999999		Jan-13-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Eng. serv for retro commissio	Draft	Owner Engineer Agre	8760 ENGINEERING LLC	\$212,000.00	\$0.00	\$0.00			Feb-15-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design modifications to BUC k	Approved	Consulting Services	CANNON DESIGN ARCHIT	\$10,040.00	\$0.00	\$0.00			Jan-10-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000021	carpet, tile and mastic removi	Draft	Continuing Services	CARDINAL ENVIRONMEN	\$35,082.00	\$0.00	\$0.00			Feb-18-2016	0
For Testing Change Orders	TEMPINT06	000001	General Contractor	Approved	Stipulated Sum Agree	CLAYCO CONSTRUCTION	\$872,848.00	\$146,855.00	\$0.00			Jan-01-2016	0
For Testing Change Orders	TEMPINT06	000001	Testing Architectural Agreeem	Approved	Owner Architect Agre	MACKEY MITCHELL ARCH	\$190,250.00	\$0.00	\$0.00			Feb-24-2016	0
Sidewalk Repair 2015 Ph2	16058	000001		Approved	Purchase Order	FIXTURE CONTRACTING	\$24,887.00	\$271.00	\$18,868.50				
Taylor Avenue Building 1fl Me	16060	3621495M		Approved	Purchase Order	BSA LIFESTRUCTURES II	\$59,200.00	\$0.00	\$0.00	3621495M			0
Taylor Avenue Building 1fl Me	16060	000002		Approved	Purchase Order	FARMER ENVIRONMENTAL	\$555.00	\$445.00	\$0.00	3630921M			0
Taylor Avenue Building 1fl Me	16060	000003		Approved	Purchase Order		\$4,500.00	\$0.00	\$0.00	3635243M			0
Taylor Avenue Building 1fl Me	16060	000004		Approved	Purchase Order	DUCT SYSTEMS INCORP	\$2,754.57	\$0.00	\$0.00	3643724M			0
Taylor Avenue Building 1fl Me	16060	000005		Approved	Stipulated Sum Agree		\$589,500.00	\$0.00	\$30,000.00				0

Generate Commitment - Short Form

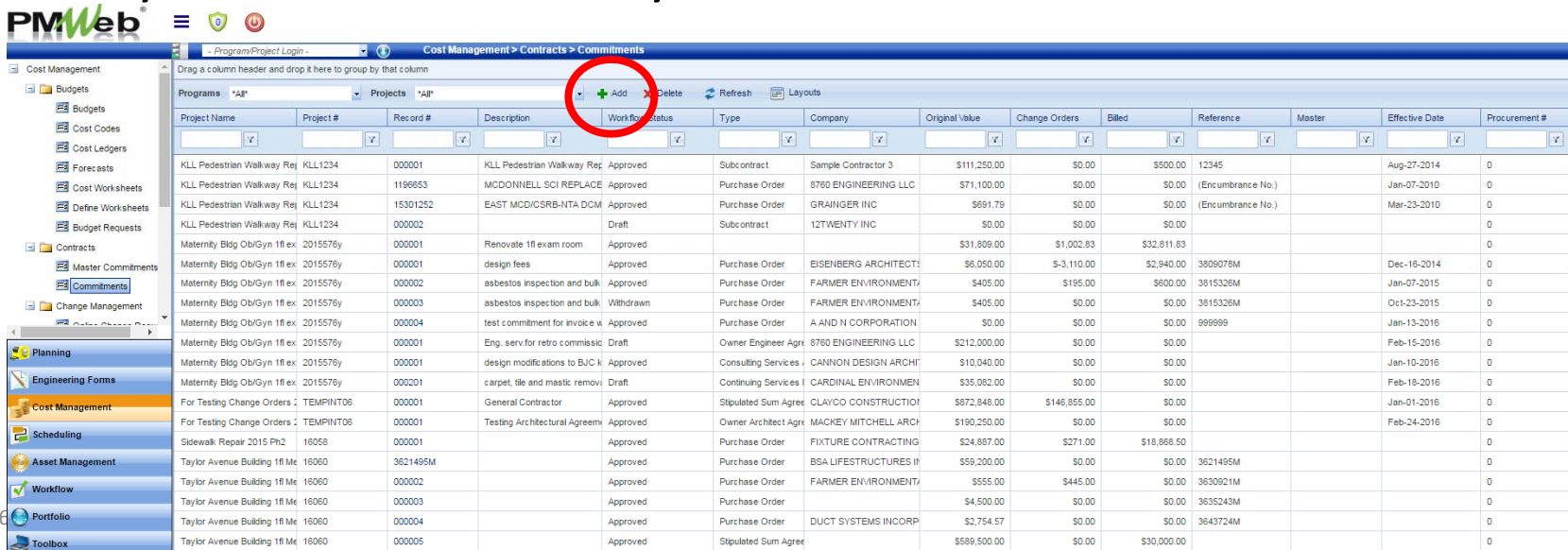
- Two ways to navigate to Commitments module
 - Project Center > Commitments hyperlink

The screenshot displays the PMWeb software interface. A blue arrow points to the 'Project Center' option in the left-hand navigation menu. The main content area shows the 'Project Center' tab selected, with a 'Commitments' link circled in red. Below this, a table lists various project management metrics and their status.

Record Type	Pending	Approved
A/P Payments	0	0
Budget Requests	0	0
Budgets	0	1
Commitment COs	0	0
Commitments	1	2
Costs	0	1
Forecasts	0	0
Funding Authorizations	0	0
Funding Records	1	0
Funding Requests	0	0
Miscellaneous Invoices	0	0
Online Change Requests	0	0
Progress Invoices	0	0
Commitment Apprentices	0	0

Generate Commitment - Short Form

- The Commitments board will display
 - Select “Add” to create a new commitment
 - Note: if the project does not yet have any commitments, you will taken directly to a new commitment record



The screenshot displays the PMWeb software interface, specifically the 'Commitments' board. The interface includes a navigation sidebar on the left with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main area shows a table of commitments with columns for Project Name, Project #, Record #, Description, Work flow status, Type, Company, Original Value, Change Orders, Billed, Reference, Master, Effective Date, and Procurement #. A red circle highlights the 'Add' button in the top toolbar of the table.

Project Name	Project #	Record #	Description	Work flow status	Type	Company	Original Value	Change Orders	Billed	Reference	Master	Effective Date	Procurement #
KLL Pedestrian Walkway Rej	KLL1234	000001	KLL Pedestrian Walkway Rej	Approved	Subcontract	Sample Contractor 3	\$111,250.00	\$0.00	\$500.00	12345		Aug-27-2014	0
KLL Pedestrian Walkway Rej	KLL1234	1196653	MCDONNELL SCI REPLACE	Approved	Purchase Order	8760 ENGINEERING LLC	\$71,100.00	\$0.00	\$0.00	(Encumbrance No.)		Jan-07-2010	0
KLL Pedestrian Walkway Rej	KLL1234	15301252	EAST MCD/C/SRB-NITA DCM	Approved	Purchase Order	GRAINGER INC	\$691.79	\$0.00	\$0.00	(Encumbrance No.)		Mar-23-2010	0
KLL Pedestrian Walkway Rej	KLL1234	000002		Draft	Subcontract	12TWENTY INC	\$0.00	\$0.00	\$0.00				
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Renovate 1fl exam room	Approved			\$31,809.00	\$1,002.83	\$32,811.83				0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design fees	Approved	Purchase Order	EISENBERG ARCHITECTS	\$6,050.00	\$-3,110.00	\$2,940.00	3080976M		Dec-16-2014	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000002	asbestos inspection and bulk	Approved	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$195.00	\$600.00	3815326M		Jan-07-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000003	asbestos inspection and bulk	Withdrawn	Purchase Order	FARMER ENVIRONMENTAL	\$405.00	\$0.00	\$0.00	3815326M		Oct-23-2015	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000004	test commitment for invoice w	Approved	Purchase Order	A.A.N.D.N CORPORATION	\$0.00	\$0.00	\$0.00	999999		Jan-13-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	Eng. serv for retro commissio	Draft	Owner Engineer Agre	8760 ENGINEERING LLC	\$212,000.00	\$0.00	\$0.00			Feb-15-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000001	design modifications to BJC k	Approved	Consulting Services	CANNON DESIGN ARCHIT	\$10,040.00	\$0.00	\$0.00			Jan-10-2016	0
Maternity Bldg Ob/Gyn 1fl ex	2015576y	000201	carpet, tile and mastic removi	Draft	Continuing Services	CARDINAL ENVIRONMEN	\$35,082.00	\$0.00	\$0.00			Feb-18-2016	0
For Testing Change Orders	TEMPINT06	000001	General Contractor	Approved	Stipulated Sum Agree	CLAYCO CONSTRUCTION	\$872,848.00	\$146,855.00	\$0.00			Jan-01-2016	0
For Testing Change Orders	TEMPINT06	000001	Testing Architectural Agree	Approved	Owner Architect Agre	MACKEY MITCHELL ARCH	\$190,250.00	\$0.00	\$0.00			Feb-24-2016	0
Sidewalk Repair 2015 Ph2	16058	000001		Approved	Purchase Order	FIXTURE CONTRACTING	\$24,887.00	\$271.00	\$18,868.50				0
Taylor Avenue Building 1fl Me	16060	3621495M		Approved	Purchase Order	BSA LIFESTRUCTURES II	\$59,200.00	\$0.00	\$0.00	3621495M			0
Taylor Avenue Building 1fl Me	16060	000002		Approved	Purchase Order	FARMER ENVIRONMENTAL	\$555.00	\$445.00	\$0.00	3630921M			0
Taylor Avenue Building 1fl Me	16060	000003		Approved	Purchase Order		\$4,500.00	\$0.00	\$0.00	3635245M			0
Taylor Avenue Building 1fl Me	16060	000004		Approved	Purchase Order	DUCT SYSTEMS INCORP	\$2,754.57	\$0.00	\$0.00	3643724M			0
Taylor Avenue Building 1fl Me	16060	000005		Approved	Stipulated Sum Agree		\$589,500.00	\$0.00	\$30,000.00				0

Generate Commitment - Short Form

- In the “Type” field select Short Form Agreement

- Program/Project Login - Cost Management > Contracts > Commitments

Select Commitment.

Type: **Short Form Agreement**

Project*
ID*
Company
Description
PO# (from ALS)
Revision
Workflow Status
Effective Date
Days
Procurement #
Paid In Full

Subcontract
Purchase Order
CM with GMP
Continuing Services
Project Agreement
Consulting Services
Agreement
Owner Architect Agreement
Owner Engineer Agreement
Short Form Agreement
Stipulated Sum Agreement

Date: May-30-2016

Billing

Do not allow overbilling (revised value or lines)
 Allow overbilling

Up to 0.00% % of revised value
 Up to 0.00% % of line item

Billing Terms: -- Select --

Retention on Services: 10.00%
Retention on Stored Materials: 10.00%

Delivery

Due Date: May-30-2016
Scheduled Delivery Date: May-30-2016
Ship To:

	Costs	Da
Original Value	\$0.00	
Approved Changes	\$0.00	
Revised Value	\$0.00	
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	
Projected Value	\$0.00	

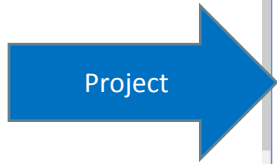
Details Adjustments Specifications Checklists Addenda Change Orders Progress Invoices Payments Notes Attachments Notifications

Drag a column header and drop it here to group by that column

Refresh Save Layout Load Default Layout

Generate Commitment - Short Form

- The ID will be auto-generated
- In the “Company” field, select the vendor



The screenshot shows a software interface for generating a commitment. The 'Project' field is highlighted with a blue arrow. The interface includes a toolbar with various icons and a 'Generate...' button. The main form area contains several sections:

- Type:** Short Form Agreement
- Project*:** moyer
- ID*:** Moyer Cafe
- Company:** (Dropdown menu)
- Description:** (Dropdown menu)
- PO# (from AIS):** (Input field)
- Revision:** (Input field)
- Workflow Status:** (Input field)
- Effective Date:** (Date picker)
- Days:** (Input field)
- Procurement #:** (Input field)
- Paid In Full:** (Input field)

The **Billing** section includes:

- Do not allow overbilling (revised value or lines)
- Allow overbilling
- 0.00% % of revised value
- 0.00% % of line item
- Services: 10.00%
- Stored Materials: 10.00%
- Delivery Date: May-30-2016

The **Costs** section includes:

Costs	Value
Original Value	\$0.00
Approved Changes	\$0.00
Revised Value	\$0.00
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
Projected Value	\$0.00

The bottom of the interface features a table with columns: Line #, Item, Description, Ext. Cost, Adjustment 1, Tax, Adjustment 2, and Total Cost. The table is currently empty.

Generate Commitment - Short Form

- Select “Effective Date”
 - This date will populate on the contract header
- “Procurement #” field is autopopulated if a bid was involved. Otherwise this field should be NULL

The screenshot shows the PMWeb interface for generating a commitment. The main form area contains the following fields:

- Type: Short Form Agreem
- Project*: Moyer Cafe
- ID*: 20140014
- Company*: Select Company
- Description: [Empty]
- PO# (from AIS): [Empty]
- PO#: [Empty]
- Revision: [Empty]
- Date: May-30-2016
- Workflow Status: Draft
- Effective Date*: May-30-2016
- Days: 0.00
- Procurement #: [Empty]
- Paid in Full: [Empty]

The Billing section includes:

- Do not allow overbilling (revised value or lines)
- Allow overbilling
- Up to: 0.00% of revised value
- Up to: 0.00% of line item
- Billing Terms: -- Select --
- Retention on Services: 0.00%
- Retention on Stored Materials: 0.00%

The Delivery section includes:

- Due Date: May-30-2016
- Scheduled Delivery Date: May-30-2016
- Ship To: Moyer Cafe

The Costs table on the right shows:

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

A blue arrow points to the 'Effective Date' field, which is set to 'May-30-2016'.

Generate Commitment - Short Form

- Select “Allow overbilling” radio button and “Up to XX% of the line item”; save record

The screenshot displays the PMWeb software interface for generating a commitment. The main form is titled "Generate Commitment" and is for a "Short Form Agreement" project named "Moyer Cafe" with ID "20140014". The form is divided into several sections:

- General Information:** Type (Short Form Agreement), Project* (Moyer Cafe), ID* (20140014), Company* (Select Company...), Description, PO# (from AIS), PO#, Revision, Date (May-30-2016), Workflow Status (Draft), Effective Date*, Days (0.00), Procurement #, and Paid In Full (checkbox).
- Billing:** This section is highlighted with a red circle. It contains three radio buttons: "Do not allow overbilling (revised value or lines)", "Allow overbilling" (selected), and "Up to 0.00% of revised value". Below these are two checked checkboxes: "Up to 0.00% of line item".
- Retention:** Retention on Services (0.00%) and Retention on Stored Materials (0.00%).
- Delivery:** Due Date (May-30-2016), Scheduled Delivery Date (May-30-2016), and Ship To (Moyer Cafe).
- Costs:** A table showing various cost metrics.

Costs	
Original Value	\$0.00
Approved Changes	\$0.00
Revised Value	\$0.00
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
Projected Value	\$0.00

The interface includes a left-hand navigation menu with categories like Planning, Engineering Forms, Cost Management, and Scheduling. The bottom of the screen shows a tabbed interface with "Details" selected, and a footer with "Refresh", "Save Layout", and "Load Default Layout" buttons.

Add Short Form Details

- Select “Add items” to add cost codes to the commitment

The screenshot displays the PMWeb software interface for managing commitments. The main window shows a commitment for '8760 ENGINEERING LLC - 315 - Backhoes onward (Julie test generate commitment)'. The 'Details' tab is active, and the 'Add Items' button is circled in red. A blue arrow points to the 'Details' tab label. The interface includes a navigation pane on the left, a top toolbar, and a data table at the bottom.

Line #	Item	Description	UOM	Quantity	Unit Cost	Ext. Cost	Adjust
001	000050	001 00 00 General Requirment		1.00	\$18,000.00	\$18,000.00	10

Add Short Form Details

- Drag line items into the cost code window
- Save

The screenshot shows a software interface for cost management. The main window is titled "ALBERICI CONSTRUCTORS INC - 002 -" and has a breadcrumb trail of "Cost Management > Contracts > Commitments". A "Commitments" dialog box is open, showing a list of cost codes. A red circle highlights the "Save" button in the top-left corner of the dialog. Another red circle highlights a row in the table with the following data: 1, 000041, 003 00 00 Concrete, Phase, Cost Code, Type, 1, 0.00. The interface includes a sidebar with navigation options like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main window title is "ALBERICI CONSTRUCTORS INC - 002 -" and the breadcrumb is "Cost Management > Contracts > Commitments".

ID	Description	Phase	Cost Code	Type	Unit	Cost	
1	000041	003 00 00 Concrete	Phase	Cost Code	Type	1	0.00

Add Short Form Details

- Cost codes will now appear on “Detail” tab
- Use shortcut: select top row; shift; bottom row; edit
- Enter cost values into the “Ext Cost” field; Update Records

Paid In Full

Ship To

Details	Adjustments	Specifications	Checklists	Addenda	Change Orders	Progress Invoices	Payments	Notes	Attachments (1)	Workflow
Drag a column header and drop it here to group by that column										
Update Records <input type="button" value="X"/> Cancel										
Line #	Item	Description	UOM	Quantity	Unit Cost	Ext. Cost	Adjustment 1			
<input type="checkbox"/>	001	000050	001 00 00 General Requirem		1.00	\$18,000.00	\$18,000.00	\$0.00		
	002	000052	002 00 00 Existing Conditio	-- Select --	1.00	\$0.00	\$0.00	\$0.00		
				2.00	\$18,000.00	\$18,000.00	\$0.00			

Add Short Form Details

- Select “Specifications” tab and select Short Form Agreement
- Populate details; save by selecting “Update Records”

The screenshot shows a software interface with a top navigation bar containing tabs: Specifications, Checklists, Addenda, Change Orders, Progress Invoices, Payments, Notes, Attachments (1), and Workflow. A blue arrow labeled 'Specifications tab' points to the 'Specifications' tab. Below this is a 'Custom Fields' section with sub-tabs: Contract Signatures, Purchase Orders, Architect Agreement, CM w/GMP, Commitment Review Checklist, Consulting Agreement, and Continuing Services Agreement. The 'Short Form Agreement' sub-tab is circled in red. Below the sub-tabs are buttons for 'Update Records' (circled in red) and 'Cancel'. The main area is a table with columns: Spec, UOM, Data, and Notes. The table contains several rows with input fields and dropdown menus.

Spec	UOM	Data	Notes
(Note Added) Project Description			<input type="checkbox"/> <input type="text"/>
General Cond. Pct		0.00	<input type="text"/>
Billing Frequency		-- Select --	<input type="text"/>
Cost Basis		-- Select --	<input type="text"/>
Commitment			<input type="text"/>
Date of Commencement			<input type="text"/>
Date of Completion			<input type="text"/>

A blue arrow labeled 'Add details' points to the table area. A small '6/:' is visible at the bottom left of the table.

Submit Short Form record into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot shows a software interface for managing a Short Form Agreement. The main form is divided into several sections:

- Project Information:** Type (Short Form Agreement), Project* (Taylor Avenue Sewer Repair-DO NOT DELETE), ID* (315), Company* (8760 ENGINEERING LLC), Description (Backhoes onward (Julie test generate commitment)), PO# (from AIS), Revision (0), Date (Apr-20-2016), Workflow Status (Draft), Effective Date* (Apr-20-2016), Days (0.00), Procurement # (001), and Paid in Full (checkbox).
- Billing:** Radio buttons for "Do not allow overbilling (revised value or lines)" (selected) and "Allow overbilling". Two "Up to" fields for percentages of revised value and line item. Billing Terms dropdown (Set to -- Select --). Retention on Services (0.00%) and Retention on Stored Materials (0.00%).
- Delivery:** Due Date (Apr-20-2016), Scheduled Delivery Date (Apr-20-2016), and Ship To field.
- Costs Table:**

Costs	
Original Value	\$18,000.00
Approved Changes	\$0.00
Revised Value	\$18,000.00
Billed	\$0.00
Retained	\$0.00
Balance Due	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00
Unbilled	\$18,000.00
Pending Changes	\$0.00
Projected Value	\$18,000.00

Below the main form is a navigation bar with tabs: Details, Adjustments, Specifications, Checklists, Addenda, Change Orders, Progress Invoices, Workflow. A blue arrow points to the "Workflow" tab. Below the navigation bar is a "Workflow Actions" section with a list of actions: Approve, Return, DO NOT USE, Withdraw (ends workflow), Final Approve, and Delegate. The "Submit" button is circled in red. To the right of the actions is an "Email Preview" section with fields for Subject and Email Body, and a "Comments" section. An "Instructions" section is partially visible on the far right.

Submit Short Form Record into Workflow

- Select Save
 - You will receive notification re: the status of the workflow

The screenshot displays a software interface for managing commitments. On the left, a navigation pane lists various modules: Planning, Engineering Forms, Cost Management (highlighted), Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main area shows a form for a commitment with the following details:

- Status: Submitted
- Effective Date: May-17-2016
- Days: 0.00
- Procurement #: [Empty]
- Paid In Full:

Below these details is a horizontal menu with tabs: Details, Adjustments, Specifications, Checklists, Addenda, Change Orders, Progress Invoices, Payments, Notes, and Attachments (1). The 'Workflow Actions' section is expanded, showing a list of actions with radio buttons:

- Approve
- Return
- DO NOT USE
- Withdraw (ends workflow)
- Final Approve
- Delegate
- Team Input (0)

The 'Team Input (0)' option is circled in red. Below this list is a 'Save' button. To the right of the actions list is an 'Email Preview' section with fields for Subject and Email Body, and a 'Comments' section. At the top right, there is a 'Delivery' section with fields for Due Date (May-16-2016), Scheduled Delivery Date (May-16-2016), and Ship To (EMILY Testing vendor security). Further right, there is an 'Open Balance' section with fields for Unbilled, Pending Changes, and Projected Value.

Commitment Vendor step in Workflow

- The commitment workflow has a step for the commitment vendor
- You can see in the workflow log every step in the workflow. The PM will receive the “commitment vendor” step and delegate it to the vendor.

	1		<input checked="" type="checkbox"/>	May-21-2016	Project Manager 1	Jon Smith		
	2				-- APM --	Commitment < \$50k		
	2.1		<input type="checkbox"/>	May-26-2016	Accountant 1	Emily Follman	Approve after PO is keyed in Marketplace	
	2.2				-- APM --	Non PO Commitment		
	2.2.1		<input type="checkbox"/>	May-31-2016	Commitment Vendor	Emily Follman		
	2.2.2		<input type="checkbox"/>	Jun-05-2016	Project Manager 1	Jon Smith		
	3				-- APM --	Commitment between \$50k & \$80k		
	3.1				-- APM --	Non PO Commitment		
	3.1.1		<input type="checkbox"/>	Jun-10-2016	Commitment Vendor	Emily Follman	Delegate to appropriate vendor contact for this commitment.	

Commitment Vendor Role

Commitment Vendor step in Workflow

- Select “Delegate” radio button
- Select the delegate from the list in the pop up window
- Save the assignment and save the workflow step

Select Delegate

Workflow Actions

Actions

- Approve
- Return
- DO NOT USE
- Withdraw (ends workflow)
- Final Approve
- Delegate

Team Input (0)

Save

Delegate Step

Save Cancel

Step: 2.2.1 - Commitment Vendor

Approver: 1353539958 - Emily Follman

Current Delegate: -- None --

Delegate To: jones - Sam Jones

Delegate All of My Steps

Alert Delegate

Message

- AUSER - Any User
- charles - Charles Charles
- emily - Emily Follman
- emily2 - Emily Rhody
- jones - Sam Jones
- kardos - John Kardos
- KLassus - Karen Lassus
- mbaver - Melissa Baver

Delegate 1-83 out of 83

Business Process

Refresh

Payments Notes Attachments (1) Workflow

Instructions

Commitment Vendor step in Workflow

- Vendors may choose not to use PMWeb
- In this case, the PM will not delegate to the vendor, but will instead email the commitment document to the vendor for signature.
- When the signed document is returned via email, the PM will add the document to the record in PMWeb and approve it as a proxy for the vendor, sending the record on to the next step in workflow

Final Signature

- After vendor has returned the signature page of the contract (either via email or PMWeb attachment, the WU final approver/designated signatory needs to add signature to signature page
- This will be done manually for now
- Electronic signatures are coming
 - Opt in/out will be required to be performed for each esign (WU and vendor)

Final Signature

- Print page, WU signer will sign, and scan
- Upload to commitment record as attachment
- Save record

The screenshot displays a software interface with a left-hand navigation menu and a main content area. The navigation menu includes: Planning, Engineering Forms, Cost Management (highlighted), Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The main content area shows a workflow step (Step 5 of 5) with tabs for Details, Adjustments, Specifications, Checklists, Addenda, Change Orders, Progress Invoices, and Payments. A 'Paid In Full' checkbox is present. A 'Ship To' field contains 'EMILY Testing vendor security'. Below the tabs, there are buttons for 'Save' (circled in red), 'Cancel', and 'Download Files'. A table with columns 'Description*' and 'File*' is visible. A yellow highlighted section contains a 'Commitment XXX Signature page' and radio button options: Document Manager, Link, SharePoint, Aconex, Email, and Upload (selected). A 'Browse...' button and 'Commitment X..' text are also present. At the bottom, there is a page number '1' and 'Page Size 20'. The footer includes the logo for 'ington nSt.Louis TECHNOLOGY'.

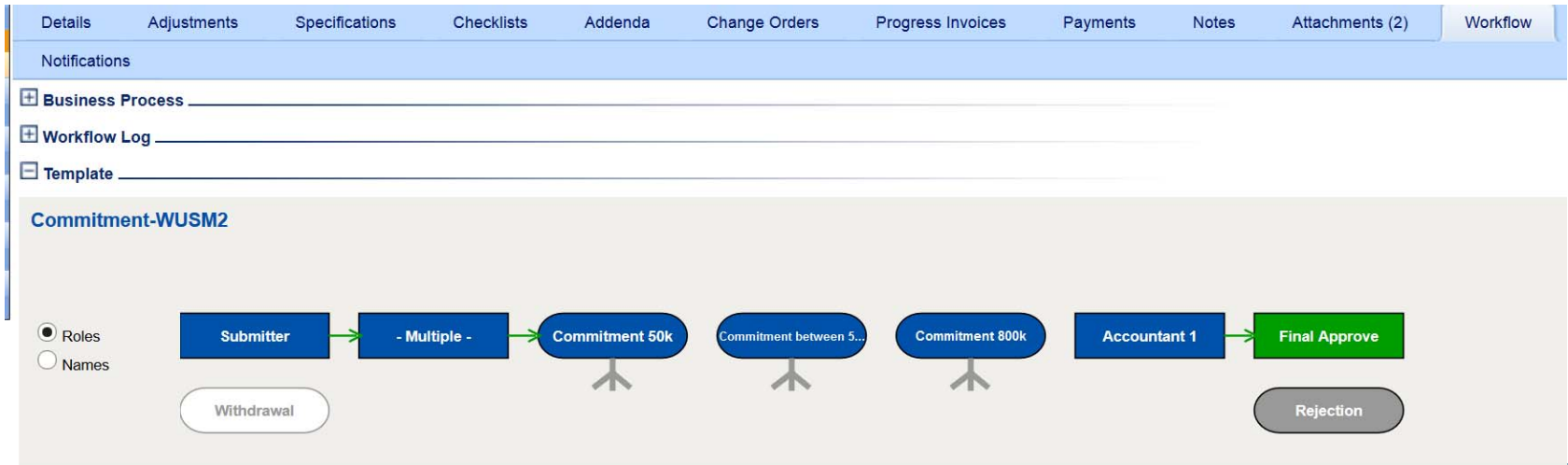
Final Approval

- Final approver will review commitment and select final approve
- Save
- Commitment is fully executed

The screenshot displays a software interface with a top navigation bar containing tabs: Details, Adjustments, Specifications, Checklists, Addenda, Change Orders, Progress Invoices, Payments, Notes, Attachments (1), and Workflow (Step 5 of 5). The main content area is divided into three sections: 'Workflow Actions', 'Email Preview', and 'Instructions'. The 'Workflow Actions' section on the left is circled in red and contains a list of actions: Approve, Return, DO NOT USE, Withdraw (ends workflow), Final Approve (selected with a radio button), and Delegate. Below this list is a 'Team Input (0)' section and a 'Save' button. The 'Email Preview' section in the middle has fields for 'Subject' and 'Email Body', and an 'Add CC' field at the bottom. The 'Comments' section on the right is a large empty text area. The 'Instructions' section on the far right is also empty.

Final Approval

- Visual workflow will show that the record has completed final approval



PMWeb[®] Training

Online Change Requests

Online Change Requests

- Two ways to navigate to Online Change Requests module
 - Cost Management > Online Change Requests Records sub-category

The screenshot displays the software's navigation tree on the left and a data table on the right. A blue arrow labeled 'Online Change Requests' points to the 'Online Change Requests' item in the 'Change Management' folder. Another blue arrow labeled 'Cost Management' points to the 'Cost Management' folder at the bottom of the navigation tree.

Project Name	Project #	Record #	Description	Workflow Status	Commitment	Company
The Lofts Phase II - Planning	20160028	000001	This is the PCO Description	Approved	459 -	PARIC CORPOI
Golf Trip Planning	2014615XGLO	000001	Description - Add Valves	Approved	321 - Lynch Exhibit Test	ROSETTA STOI
Golf Trip Planning	2014615XGLO	000002	Description goes here. Cont	Approved	321 - Lynch Exhibit Test	ROSETTA STOI
North Campus Medicine Phy	2014615XGMA6	000002	Install trim to top/cap reveal	Approved	008906 - renovation for Phys	INTERFACE CC
North Campus Medicine Phy	2014615XGMA6	000003	New window and frame	Approved	008906 - renovation for Phys	INTERFACE CC
North Campus Medicine Phy	2014615XGMA6	000004	Disassemble furniture	Approved	008906 - renovation for Phys	INTERFACE CC
North Campus Medicine Phy	2014615XGMA6	000005	Receptacles and dote rough	Approved	008906 - renovation for Phys	INTERFACE CC
North Campus Medicine Phy	2014615XGMA6	000006	Voice and data rough-ins	Approved	008906 - renovation for Phys	INTERFACE CC
North Campus Medicine Phy	2014615XGMA6	000007	Electrical T&M	Approved	008906 - renovation for Phys	INTERFACE CC
North Campus Medicine Phy	2014615XGMA6	000008	Camera-trace-locate	Approved	008906 - renovation for Phys	INTERFACE CC
North Campus Medicine Phy	2014615XGMA6	000009	Reassemble furniture	Approved	008906 - renovation for Phys	INTERFACE CC
North Campus Medicine Phy	2014615XGMA6	000010	Clean, rearrange furniture, r	Approved	008906 - renovation for Phys	INTERFACE CC
North Campus Medicine Phy	2014615XGMA6	000001	to buy more pipe	Approved	009 - piping	GRAINGER INC

Online Change Requests

- Two ways to navigate to Online Change Requests module
 - Project Center > Select Online Change Requests hyperlink

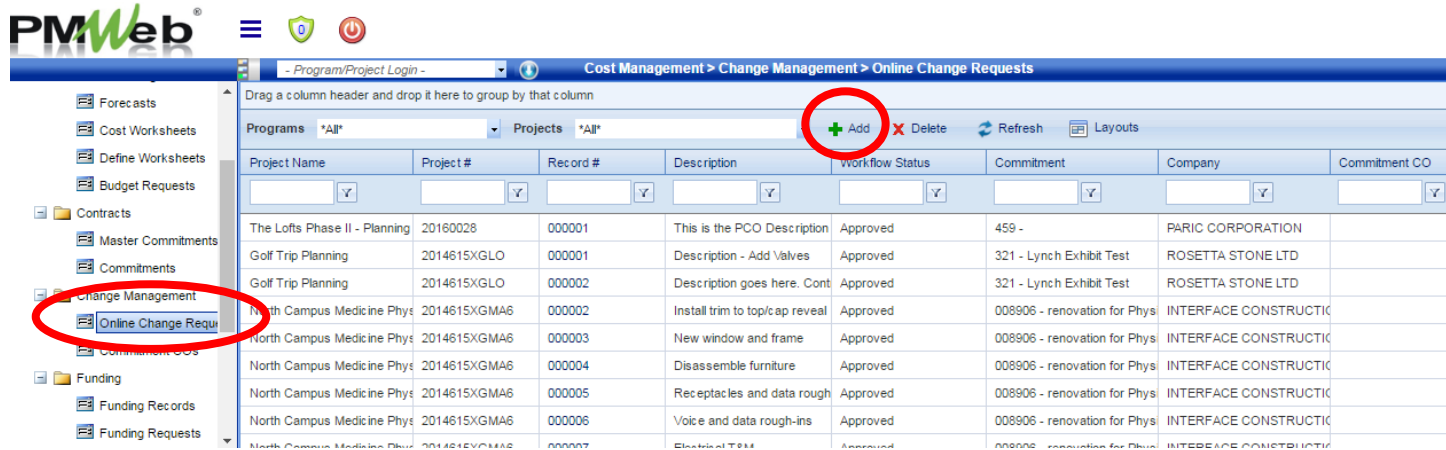
The screenshot displays the PMWeb software interface. The left sidebar shows a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, and Workflow. The main content area is titled 'Project Center' and contains a form for creating or editing a project. The form includes fields for Program (ATEST1-WUSM), Project ID (2014616A7), Name (Team Input), Location (00116 - Urbauer Hall), Project Status, Project Type, Category, Workflow Status, Currency (Dollar), Target Budget (\$0.00), Target Revenue (\$0.00), Target Duration, Target Start/Finish, Actual Start/Finish, Percent Complete (0.00%), and Scope.

Below the form is a 'Navigator' table showing various record types and their counts. The 'Online Change Requests' row is circled in red.

Record Type	Pending	Approved
A/P Payments	0	0
Budget Requests	0	0
Budgets	0	1
Commitment COs	0	0
Commitments	0	0
Cost Codes	0	1
Forecasts	0	0
Funding Authorizations	0	0
Funding Records	0	0
Funding Requests	0	0
Online Change Requests	0	0
Commitment Apprentices	0	0

Online Change Requests

- Add a new Online Change Request record or select your project from the board



The screenshot displays the PMWeb application interface. The left sidebar contains a navigation menu with the following items: Forecasts, Cost Worksheets, Define Worksheets, Budget Requests, Contracts, Master Commitments, Commitments, Change Management, Online Change Requests (circled in red), Commitment COS, Funding, Funding Records, and Funding Requests. The main window title is "Cost Management > Change Management > Online Change Requests". Below the title bar, there is a toolbar with "Add" (circled in red), "Delete", "Refresh", and "Layouts" buttons. The main area contains a table with the following columns: Project Name, Project #, Record #, Description, Workflow Status, Commitment, Company, and Commitment CO. The table lists several records, including "The Lofts Phase II - Planning" and "North Campus Medicine Phys".

Project Name	Project #	Record #	Description	Workflow Status	Commitment	Company	Commitment CO
The Lofts Phase II - Planning	20160028	000001	This is the PCO Description	Approved	459 -	PARIC CORPORATION	
Golf Trip Planning	2014615XGLO	000001	Description - Add Valves	Approved	321 - Lynch Exhibit Test	ROSETTA STONE LTD	
Golf Trip Planning	2014615XGLO	000002	Description goes here. Cont	Approved	321 - Lynch Exhibit Test	ROSETTA STONE LTD	
North Campus Medicine Phys	2014615XGMA6	000002	Install trim to top/cap reveal	Approved	008906 - renovation for Phys	INTERFACE CONSTRUCTIO	
North Campus Medicine Phys	2014615XGMA6	000003	New window and frame	Approved	008906 - renovation for Phys	INTERFACE CONSTRUCTIO	
North Campus Medicine Phys	2014615XGMA6	000004	Disassemble furniture	Approved	008906 - renovation for Phys	INTERFACE CONSTRUCTIO	
North Campus Medicine Phys	2014615XGMA6	000005	Receptacles and data rough	Approved	008906 - renovation for Phys	INTERFACE CONSTRUCTIO	
North Campus Medicine Phys	2014615XGMA6	000006	Voice and data rough-ins	Approved	008906 - renovation for Phys	INTERFACE CONSTRUCTIO	
North Campus Medicine Phys	2014615XGMA6	000007	Electrical T&M	Approved	008906 - renovation for Phys	INTERFACE CONSTRUCTIO	

Add Online Change Requests

- Enter header details
 1. Project* = Select the project the Online Change Request is for
 2. Commitment* = Select the Commitment for the change – NOTE: Once this is selected, the Company field will auto-populate with the company tied to the commitment.
 3. Description* = Enter a brief explanation of the change
 4. Reference = N/A – leave NULL

The screenshot shows the PMWeb interface for adding an online change request. The form is titled "Cost Management > Change Management > Online Change Requests". The left sidebar shows a navigation menu with "Online Change Request" selected. The main form area contains the following fields and sections:

- Company:** ALBERICI CONSTRUCTORS INC (auto-populated)
- Project*:** Moyer Cafe (callout 1)
- Commitment*:** ALBERICI CONSTRUCTORS INC - (callout 2)
- Description*:** This is a test (callout 3)
- Reference:** (callout 4)
- Record #*:** 12345 (callout 5)
- Workflow Status:** Draft (callout 6)
- Revision:** (callout 7)
- Change Event:** (callout 8)
- Risk Analysis:** (callout 9)
- Commitment Change Order:** (callout 10)
- Requested:**
 - Request Date:** Jun-01-2016 (callout 11)
 - Needed By:** (callout 12)
 - Cause:** SCF - Scope Change (Facilities) (callout 13)
 - Contact:** (callout 14)
 - Comment:** (callout 15)
- Change Request Recap:**

	Costs	Days
Original Value	\$0.00	0.00
Approved Changes	\$0.00	0.00
Revised Value	\$0.00	0.00
This Request	\$0.00	0.00
- Category:** Lump Sum (callout 16)
- Post As:** Revised Scope (callout 17)

At the bottom of the form, there is a "Submit" button and a "Details" tab selected. The bottom status bar shows "6/20/2016" and "Planning".

Online Change Requests

- Enter header details
 5. Record #* = This field will auto-populate with the next number in sequence for Online Change Requests for the commitment. Change this number to the Vendor PCO#
 6. Change Event = N/A – Leave NULL
 7. Risk Analysis = N/A – Leave NULL
 8. Commitment Change Order = This field will auto-populate once the Online Change Request is linked to a Change Order

The screenshot shows the PMWeb Online Change Requests form. The form is titled "Cost Management > Change Management > Online Change Requests". The left sidebar contains a navigation menu with items like Budgets, Contracts, and Change Management. The main form area has several sections: "Company" (ALBERICI CONSTRUCTORS INC), "Project*" (Moyer Cafe), "Commitment*" (ALBERICI CONSTRUCTORS INC), "Description" (This is a test), "Record #*" (12345), "Workflow Status" (Draft), "Revision" (empty), "Requested" (Jun-01-2016), "Needed By" (empty), "Cause" (SCF - Scope Change (Facilities)), "Contact" (empty), "Comment" (empty), "Change Request Recap" table, "Category" (Lump Sum), and "Post As" (Revised Scope). Red numbered callouts (1-15) point to various fields and sections. The "Change Request Recap" table is as follows:

	Costs	Days
Original Value	\$0.00	0.00
Approved Changes	\$0.00	0.00
Revised Value	\$0.00	0.00
This Request	\$0.00	0.00

Online Change Requests

- Enter header details

9. Request Date = Not required - Enter the date of the contractor “back up” documentation when applicable
10. Need By = Not required – Enter the date of when the change is needed by when applicable; otherwise leave NULL
11. Cause* = Select a cause for the change in the list of values
12. Contact = Not required – If there is a contact name, enter that information here

PMweb

Cost Management > Change Management > Online Change Requests

Select Online Change Request...

Company: ALBERICI CONSTRUCTORS INC

Requested

Change Request Recap

	Costs	Days
Original Value	\$0.00	0.00
Approved Changes	\$0.00	0.00
Revised Value	\$0.00	0.00
This Request	\$0.00	0.00

Category: Lump Sum

Post As: Revised Scope

Submit

Details Specifications Notes Attachments

Drag a column header and drop it here to group by that column

Refresh Save Layout Load Default Layout

Online Change Requests

- Enter header details
 13. Comment = Not mandatory, but you can add a more details of the change in this box
 14. Category* = Select a value from the drop down – This is the terms of the cost from the contractor
 15. Post As* = Always use the default value of “Revised Scope”
- Save

The screenshot shows the PMWeb Online Change Requests form. The form is titled "Online Change Requests" and is part of the "Cost Management" module. The form is divided into several sections: "Requested", "Change Request Recap", and "Details".

The "Requested" section contains the following fields:

- 1. Project*: Moyer Cafe
- 2. Commitment*: ALBERICI CONSTRUCTORS INC -
- 3. Description: This is a test
- 4. Reference
- 5. Record #: 12345
- 6. Change Event
- 7. Risk Analysis
- 8. Commitment Change Order
- 9. Request Date: Jun-01-2016
- 10. Needed By
- 11. Cause: SCF - Scope Change (Facilities)
- 12. Contact
- 13. Comment

The "Change Request Recap" section contains the following table:

	Costs	Days
Original Value	\$0.00	0.00
Approved Changes	\$0.00	0.00
Revised Value	\$0.00	0.00
This Request	\$0.00	0.00

The "Details" section contains the following fields:

- 14. Category: Lump Sum
- 15. Post As: Revised Scope

The form also includes a "Submit" button and a "Save" button. The "Save" button is circled in red.

Online Change Requests

- Select “add items” to open the “items” window
- Drag over cost codes for those that are now being modified from the original commitment
- Save

The screenshot displays the PMWeb software interface for managing online change requests. The main window shows the 'Online Change Requests' section for a project named '001 - The Lofts Phase II - Planning'. The 'Items' window is open, showing a table of cost codes. A blue arrow labeled 'Details Tab' points to the 'Details' tab in the sidebar. The 'Save' button in the 'Items' window is circled in red. The table of cost codes is also circled in red, showing a row with the following data:

Line #	Item	Description	Phase	Cost Code	Type	Quantity	Unit Cost
1	00005C	001 00 00 General Rec		01-001-001 00 00		1	0.00

Online Change Requests

- Select “edit selected lines”
 - If multiple lines, use shortcut: select top row; shift; bottom row; edit

The screenshot displays the PMWeb software interface for 'Online Change Requests'. The top navigation bar shows 'Cost Management > Change Management > Online Change Requests'. The main form area includes fields for Company (ALBERICI CONSTRUCTORS INC), Project* (Moyer Cafe), Commitment* (002 -), Description (This is a test), Reference, Record #* (12345), Workflow Status (Draft), and Revision (0). There are also sections for 'Requested' (Request Date: Jun-01-2016, Needed By, Cause: SCF - Scope Change (Facilities), Contact, Comment) and 'Change Request Recap' (Original Value: \$15,000.00, Approved Changes: \$0.00, Revised Value: \$15,000.00, This Request: \$0.00, Category: Lump Sum, Post As: Revised Scope). A blue arrow labeled 'Details Tab' points to the 'Details' tab in the table below. The table has columns: Item, Description, UOM, Quantity, Unit Cost, Ext. Cost, Cost Code, and Cost Ty. The first row is highlighted in orange and contains: 001, 50, 001 00 00 General Requirements, 1.00, \$0.00, \$0.00, 01-001-001 00 00, and Cost Ty. A red circle highlights the 'Edit Selected Lines' button in the table's toolbar.

Online Change Requests

- Enter change amount in the “Unit Cost” field.
 - Ext Cost field will auto-populate with the same value
- “Update Records”

The screenshot displays the PMWeb software interface for managing change requests. The main form is titled "12345 - Moyer Cafe - This is a test" and includes fields for Company (ALBERICI CONSTRUCTORS INC), Project (Moyer Cafe), Commitment (002 -), Description (This is a test), Record # (12345), and Workflow Status (Draft). A "Requested" section contains fields for Request Date (Jun-01-2016), Needed By, Cause (SCF - Scope Change (Facilities)), Contact, and Comment. A "Change Request Recap" table shows Original Value (\$15,000.00), Approved Changes (\$0.00), Revised Value (\$15,000.00), and This Request (\$0.00). A "Details" tab is active, showing a table with columns: Line #, Description, UOM, Quantity, Unit Cost, Ext. Cost, Cost Code, and Cost Type. The "Update Records" button is circled in red, and the Unit Cost, Ext. Cost, and Cost Code fields in the table are also circled in red. A blue arrow points to the "Details Tab" label.

Line #	Description	UOM	Quantity	Unit Cost	Ext. Cost	Cost Code	Cost Type
50	001 00 00 General Requirements	-- Select --		1.00	\$15,000.00	01-001-01 00 00	-- Select --
				1.00	\$0.00	\$0.00	

Online Change Requests

- On “Attachments” tab, use quick file upload
- Upload Contractor Back Up document that was submitted by the contractor; Save

The screenshot displays the PMWeb software interface for managing Online Change Requests. The main form includes fields for Company (ALBERICI CONSTRUCTORS INC), Project* (Moyer Cafe), Commitment* (002 -), Description (This is a test), Record #* (12345), Workflow Status (Draft), Revision (0), Request Date (Jun-01-2016), Needed By, Cause (SCF - Scope Change (Facilities)), Contact, and Comment. A 'Submit' button is located at the bottom right of the form. A blue arrow points to the 'Attachments' tab, which is currently selected. Below the form, the Attachments section shows 'No records to display.' and a 'Quick File Upload' button, which is circled in red. Below the 'Quick File Upload' button, there is a text box with the instruction 'Select multiple files to upload or drop files in the box below' and a 'Select' button, also circled in red. The left sidebar shows a navigation menu with 'Cost Management' highlighted. The top navigation bar includes 'Program/Project Login', 'Cost Management', and 'Online Change Requests'.

	Costs	Days
Original Value	\$15,000.00	0.00
Approved Changes	\$0.00	0.00
Revised Value	\$15,000.00	0.00
This Request	\$15,000.00	0.00

Category	Post As
Lump Sum	Revised Scope

Online Change Requests

- Change “Workflow Status” to Approved; Save
 - Online Change Requests do not require workflow
 - Setting the Workflow Status to approved is an indicator that request is complete and can be attached to a Commitment Change Order.

The screenshot displays the PMWeb software interface for managing Online Change Requests. The main form is titled "12345 - Moyer Cafe - This is a test". The "Workflow Status" dropdown menu is open, showing options: Draft, Submitted, Returned, Resubmitted, Approved, Rejected, and Withdrawn. A blue arrow points to the "Workflow Status" dropdown, and a red circle highlights the "Approved" option. Another red circle highlights the "Save" button in the top right corner of the form. The "Change Request Recap" table is visible on the right side of the form.

	Costs	Days
Original Value	\$15,000.00	0.00
Approved Changes	\$0.00	0.00
Revised Value	\$15,000.00	0.00
This Request	\$15,000.00	0.00

The logo for PMWeb, featuring the letters 'PM' in a bold, black, sans-serif font, followed by a stylized green 'W' that overlaps the 'M', and 'eb' in a smaller, black, sans-serif font. A registered trademark symbol (®) is located to the upper right of the 'b'. The entire logo is set against a white background with a subtle reflection effect below it.

PMWeb[®] Training

Accountinator

AIS “Accountinator”

- The AIS Accountinator is the AIS tool used to connect the PM Web project number with the AIS plant fund number so that PM Web and AIS activity can be matched in each system.
 - Property Accounting (Senior Accountant) will enter the PM Web and AIS plant fund information into the “Accountinator” for each project fund created.
 - To enter the data into the “Accountinator” go to AIS>Construction Management>PMWeb Project Accounts.

The screenshot displays the AIS System web interface. At the top, the title "AISystem" is visible with "SQL Server TEST" below it. A "Search Menu:" window is open, showing a search input field and a magnifying glass icon. The main navigation menu on the left includes "Welcome", "Anderson", "Message I", "You ha", "System", "FIS", "List of Bro", "Updated F", "New Milee", "Useful Lir", and a list of links including "Medical School Finance Office", "Danforth Campus Research Office", "Sponsored Project Accounting", "Systems and Procedures", "Washington University Home", "Security Access Forms", and "Code of Conduct". A sub-menu for "PMWeb Project Accounts" is open, displaying a table of project records.

Project Number	Details	Date
	Details	09/22/2014
	Details	07/29/2014
	Details	04/25/2014
14	Details	01/07/2013
ebsite.	Details	01/29/2013
	Details	12/09/2013

AIS “Accountinator”

- Use the screen below to search for an existing plant fund or PM Web project number, or to add a new project.

AISystem
SQL Server TEST

Favorites | Main Menu > Construction Management > PMWeb Project Accounts

PMWeb Project Accounts


Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Add a New Value**

▼ Search Criteria

Project ID:	begins with ▼	<input type="text"/>
Ledger:	= ▼	<input type="text"/> ▼
Class:	= ▼	<input type="text"/> ▼
Department Number:	begins with ▼	<input type="text"/> 🔍
Fund:	begins with ▼	<input type="text"/>

Case Sensitive

Search | **Clear** | [Basic Search](#) |  [Save Search Criteria](#)

AIS “Accountinator”

- To SEARCH for the AIS plant fund number, type in the PMWeb project # and the ledger class (52) for the plant fund. You also have the option to enter the plant fund number to search for the related PMWeb project number.

PMWeb Project Accounts

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Project ID:

Ledger:

Class:

Department Number:

Fund:

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

AIS “Accountinator”

- Select “Search” and the Project Details will be displayed.

AI System
SQL Server TEST

favorites | Main Menu > Construction Management > PMWeb Project Accounts

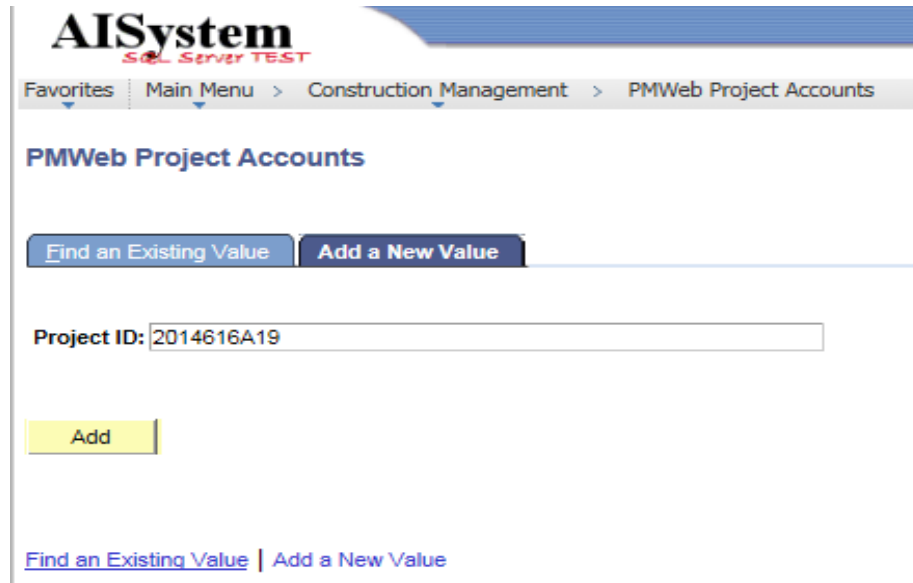
Project Account Maintenance

Project Details

Project ID:	2014616A12		
Comment:	<input type="text" value="PMWeb Test"/>		
Ledger:	<input type="text" value="5"/>	Created By:	334139 Bayer, Melissa Ann
Class:	<input type="text" value="2"/>	Created on:	06/07/16 12:29PM
Dept:	<input type="text" value="000997"/>	Updated by:	334139 Bayer, Melissa Ann
*Fund:	<input type="text" value="85497"/>	Updated on:	06/07/16 12:30PM
SR Code:	<input type="text"/>		
Status:	<input type="text" value="Active"/>		

AIS “Accountinator”

- To enter a NEW project into the Accountinator, go to the “Add a New Value” tab and enter the PM Web account number.
 - Select “Add”



The screenshot shows the AIS System web interface. At the top, the logo "AISystem" is displayed with "SQL Server TEST" underneath. A breadcrumb trail reads "Favorites | Main Menu > Construction Management > PMWeb Project Accounts". Below this, the page title "PMWeb Project Accounts" is shown. There are two tabs: "Find an Existing Value" and "Add a New Value", with the latter being selected. A text input field labeled "Project ID:" contains the value "2014616A19". Below the input field is a yellow "Add" button. At the bottom of the page, there are links for "Find an Existing Value" and "Add a New Value".

AIS “Accountinator”

- Enter project details and the related AIS plant fund number in the appropriate fields to connect the PM Web project number with the AIS plant fund number for future transactional integrations.
- Save

AISystem
SQL Server TEST

Favorites | Main Menu > Construction Management > PMWeb Project Accounts

Project Account Maintenance

Project Details

Project ID: 2014616A19

Comment:

Ledger: ▼

Class: ▼

Dept: 🔍

*Fund:

SR Code:

Status: ▼

Created By: 061594 Anderson, Constance L

Created on: 06/10/16 4:18PM

Updated by: 061594 Anderson, Constance L

Updated on: 06/10/16 4:19PM

AIS “Accountinator”

- Once the “Accountinator” information has been set up for the PM Web project number and AIS plant fund number, the plant fund number will be added to the Project record in PMWeb through integration.

The screenshot displays the PMWeb interface for a project record. The main form is titled 'CSR-B NTA 3fl & East McDonnell 1fl DCI'. Key fields include:

- Program: WUSM - Projects (Independent Resc)
- Project ID*: 2014616A19
- Name*: CSR-B NTA 3fl & East McDonnell 1fl DCI
- Location: 0086 - CSR-B - North Tower Addition
- Project Status: Construction
- Project Type: Capital Projects
- Category: -- Select --
- Workflow Status: Draft
- Revision: 0 Date: May-20-2016
- Currency: Dollar (United States of America)
- Program WBS: Select Program WBS
- Target Budget: \$994,074.00
- Project Account Amount: \$0.00
- Target Duration: 0 UOM: -- Select --
- Target Start: Target Finish
- Percent Complete Scope: 0.00%
- Initiative ID: 2014616A19

The 'Details' tab is active, showing the 'Address' section with fields for Address 1, Address 2, City, State, Country, Phone, and Fax. The 'Personnel' section includes fields for Client, GC, Architect, and Owner. The 'Account #' field is highlighted with a red circle, containing the value '52-003422-82863'. The 'Linked Assets' table at the bottom shows a table with columns for Suite, Location, Building, and Floor, with a single row for 'CSR-B - North Tower Addition'.

The logo for PMWeb, featuring the letters 'PM' in black, a green stylized 'W' that overlaps 'PM' and 'eb', and 'eb' in black. A registered trademark symbol (®) is located to the upper right of the 'b'.

PMWeb® Training

Miscellaneous Invoices

Miscellaneous Invoices

- Two ways to navigate to Misc Invoices module
 - Cost Management > Miscellaneous Invoices sub-category

The screenshot shows the PMWeb application interface. The left sidebar contains a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. Two blue arrows point to 'Misc Invoices' and 'Cost Management'. The main window displays a table of invoice records under the path 'Cost Management > Invoices > Miscellaneous Invoices'.

Project Name	Project #	Record #	Description	Workflow Status	Company	Reference	Category	Period
DO NOT DELETE Jen Li	20160051	012345	Test Misc Invoice	Draft	GRAINGER INC		IF (Free Balance)	04
DO NOT DELETE Jen Li	20160051	041916misc 1	Test of Misc	Draft	Hill PCI Group		IF (Free Balance)	02
DO NOT DELETE Green I	2014615XGLK	041916misc.3	this is fun	Approved	LITE SOURCE INC		IF (Free Balance)	05
DO NOT DELETE Green I	2014615XGLK	246TEST		Draft	BUSCOMM INC		IF (Free Balance)	05
* DO NOT DELETE* CSRB	2014615XGLU	041916misc 1	where does this go	Approved	Hill PCI Group		IF (Free Balance)	FY16 Mar
* DO NOT DELETE* CSRB	2014615XGLU	Test001		Approved	SURDEX CORPORATIO		IF (Free Balance)	FY16 Apr
* DO NOT DELETE* CSRB	2014615XGLU	041916misc 2	where will this go misc 2	Approved	TELECOMM & COMPUT		IF (Free Balance)	FY16 Mar
* DO NOT DELETE* CSRB	2014615XGLU	123455578887788 8881misc 3	Test of a long invoice # and	Approved	Moonrise Hotel		IF (Free Balance)	FY16 May
* DO NOT DELETE* CSRB	2014615XGLU	Anothermisc	where does this show up?	Approved	MATERIALS RESEARCH		IF (Free Balance)	FY16 Apr
* DO NOT DELETE* CSRB	2014615XGLU	123456aa	123456aa	Approved	ABC Drive Co		IF (Free Balance)	FY16 Mar
* DO NOT DELETE* CSRB	2014615XGLU	prop12		Approved	MICROSOFT CORPOR	Another property one	IF (Free Balance)	
* DO NOT DELETE* CSRB	2014615XGLU	prop13		Approved	BMC SOFTWARE INC	test for property	IF (Free Balance)	
Danforth University Center 1	2013907	1724460	Reimbursement for maintena	Approved	Washington University Di		ID (Inter-Departmental)	FY16 Jul
Danforth University Center 1	2013907	005472		Approved	CROSS RHODES REPR		IF (Free Balance)	FY16 Jul
Brown School of Social Work	2011921	142130		Approved	Moonrise Hotel		IF (Free Balance)	FY16 Jul
Brown School of Social Work	2011921	142038		Approved	Moonrise Hotel		IF (Free Balance)	FY16 Jul
Brown School of Social Work	2011921	142061		Approved	Moonrise Hotel		IF (Free Balance)	FY16 Jul
Brown School of Social Work	2011921	142924		Approved	Moonrise Hotel		IF (Free Balance)	FY16 Jul
Brown School of Social Work	2011921	141980		Approved	Moonrise Hotel		IF (Free Balance)	FY16 Jul
Brown School of Social Work	2011921	141974		Approved	Moonrise Hotel		IF (Free Balance)	FY16 Jul

Miscellaneous Invoices

- Two ways to navigate to Misc Invoices module
 - Project Center > Select Miscellaneous Invoices hyperlink

The screenshot displays the PMWeb software interface. The top navigation bar shows the breadcrumb path: **Cost Management > Invoices > Miscellaneous Invoices**. The main content area is divided into several sections:

- Left Sidebar:** A vertical navigation menu with categories like Planning, Engineering Forms, Cost Management (highlighted), Scheduling, Asset Management, Workflow, and Portfolio. Under 'Cost Management', 'Invoices' is expanded to show 'Miscellaneous Invoices'.
- Project Center Tab:** Contains fields for 'Actual Start/Finish', 'Percent Complete' (0.00%), and 'Scope' (This is a test to build a new cafe on WUSM campus.). There is also a file upload area.
- Table of Record Types:** A table with columns for 'Record Type', 'Pending', and 'Approved'. The 'Miscellaneous Invoices' row is circled in red.
- Summary Table:** A table on the right side of the screen showing project statistics, including 'Total Project Budget' (\$0.0) and 'Project Type' (New Constructive).

Record Type	Pending	Approved
A/P Payments	0	0
Budget Requests	1	1
Budgets	0	1
Commitment COs	0	0
Commitments	1	4
Cost Codes	0	1
Forecasts	1	0
Funding Authorizations	0	0
Funding Records	1	2
Funding Requests	0	0
Miscellaneous Invoices	0	0
Progress Invoices	6	2
Commitment Apprentices	0	0

Miscellaneous Invoices

- Add a new invoice record

The screenshot displays the PMWeb interface for 'Miscellaneous Invoices'. The left sidebar shows a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, and Asset Management. The main window shows a table of invoice records with columns for Project Name, Project #, Record #, Description, Workflow Status, Company, Reference, Category, and Period. A red circle highlights the '+ Add' button in the top toolbar, indicating the action to add a new record.

Project Name	Project #	Record #	Description	Workflow Status	Company	Reference	Category	Period
DO NOT DELETE Jen Li	20160051	012345	Test Misc Invoice	Draft	GRAINGER INC		IF (Free Balance)	04
DO NOT DELETE Jen Li	20160051	041916misc1	Test of Misc	Draft	Hill PCI Group		IF (Free Balance)	02
DO NOT DELETE Green I	2014615XGLK	041916misc3	this is fun	Approved	LITE SOURCE INC		IF (Free Balance)	05
DO NOT DELETE Green I	2014615XGLK	246TEST		Draft	BUSCOMM INC		IF (Free Balance)	05
* DO NOT DELETE* CSR	2014615XGLU	041916misc1	where does this go	Approved	Hill PCI Group		IF (Free Balance)	FY16 Mar
* DO NOT DELETE* CSR	2014615XGLU	Test001		Approved	SURDEX CORPORATIO		IF (Free Balance)	FY16 Apr
* DO NOT DELETE* CSR	2014615XGLU	041916misc2	where will this go misc2	Approved	TELECOMM & COMPUT		IF (Free Balance)	FY16 Mar
* DO NOT DELETE* CSR	2014615XGLU	12345578887788 8881misc3	Test of a long invoice # and	Approved	Moonrise Hotel		IF (Free Balance)	FY16 May
* DO NOT DELETE* CSR	2014615XGLU	Anothermisc	where does this show up?	Approved	MATERIALS RESEARCH		IF (Free Balance)	FY16 Apr
* DO NOT DELETE* CSR	2014615XGLU	123456aa	123456aa	Approved	ABC Drive Co		IF (Free Balance)	FY16 Mar
* DO NOT DELETE* CSR	2014615XGLU	prop12		Approved	MICROSOFT CORPOR	Another property one	IF (Free Balance)	
* DO NOT DELETE* CSR	2014615XGLU	prop13		Approved	BMC SOFTWARE INC	test for property	IF (Free Balance)	
Danforth University Center 1	2013907	1724460	Reimbursement for mainten	Approved	Washington University D		ID (Inter-Departmental)	FY16 Jul
Danforth University Center 1	2013907	005472		Approved	CROSS RHODES REPR		IF (Free Balance)	FY16 Jul
Brown School of Social Work	2011921	142130		Approved	Moonrise Hotel		IF (Free Balance)	FY16 Jul
Brown School of Social Work	2011921	142038		Approved	Moonrise Hotel		IF (Free Balance)	FY16 Jul

Miscellaneous Invoices

- Select the project
- Select the company
 - Type in the dropdown field or select the magnifying glass for a list; save

The screenshot shows the PMWeb application interface. The breadcrumb navigation is 'Cost Management > Invoices > Miscellaneous Invoices'. The form contains the following fields:

- Project*: Moyer Cafe
- Company*: (highlighted with a red oval)
- Invoice #: ABC Drive Co
- Invoice Date: OPTIMAL ENGINEERING SOLUTIONS
- Description: 8760 ENGINEERING LLC
- Revision: GRAINGER INC
- Workflow Status: ROSETTA STONE LTD
- Paid In Full: TELECOMM & COMPUTER MARKETING INC
- DUNIWAY STOCKROOM CORP
- IBM CORPORATION
- AT&T DATACOMM INC
- TUREC ADVERTISING COMPANY INC

The 'Invoice Recap' section shows:

Invoice Amount	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00

Miscellaneous Invoices

- Enter header details (many found on the Pay App for entry)
 1. Invoice # = Type in the Vendor Invoice # in this field
 2. Invoice Date = Enter in the actual date of the invoice
 3. Description = Enter a brief description of the work for this invoice
 4. Paid in Full = Leave this box UN-checked

The screenshot shows the PMWeb interface for entering a Miscellaneous Invoice. The main form contains the following fields:

- Project*: Moyer Cafe
- Company*: 501 CREATIVE INC
- Invoice #: (Empty field, highlighted with a red circle 1)
- Invoice Date: May-24-2016
- Description: (Empty field, highlighted with a red circle 2)
- Revision: (Empty field), Date: May-24-2016
- Workflow Status: Draft
- Paid In Full: (highlighted with a red circle 4)
- Cost Period: Select Period...
- Billing Terms*: -- Select -- (highlighted with a red circle 6)
- Invoice Due*: (Empty field, highlighted with a red circle 7)
- Payment Explanation: (Empty field, highlighted with a red circle 8)
- Category: -- Select -- (highlighted with a red circle 9)

On the right side, there is an "Invoice Recap" table:

Invoice Recap	
Invoice Amount	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00

At the bottom, there are tabs for Details, Adjustments, Specifications, Payments, Notes, Attachments, and Notifications. A red circle 10 highlights a "Post to Non-commitment Costs" checkbox.

Miscellaneous Invoices

- Enter header details (many found on the Pay App for entry)
 5. Cost Period = Enter the date of which the work incurred – Data necessary for Cash Flow and Accrual Reporting
 6. Billing Terms = This value represents days, and should be set to 30
 7. Invoice Due = This field is informational only. This date will represent the Invoice Date + the value in the Billing Terms

The screenshot shows the PMWeb software interface for entering Miscellaneous Invoice details. The interface includes a navigation pane on the left, a main data entry area, and an invoice recap table.

Navigation Pane (Left):

- Home Workbooks
- Budget Requests
- Contracts
 - Master Commitments
 - Commitments
- Change Management
 - 1 Online Change Request
 - 2
 - 3
 - 4
- Funding
 - Funding Records
 - Funding Requests
 - Funding Authorizations
- Invoices

Main Data Entry Area:

Project*: Moyer Cafe (5) Cost Period: Select Period... (5)
Company*: 501 CREATIVE INC (6) Billing Terms*: -- Select -- (6)
Invoice # (7) Invoice Due* (7)
Invoice Date: May-24-2016 (8) Payment Explanation (8)
Description (9) Category: -- Select -- (9)
Revision: [] Date: May-24-2016
Workflow Status: Draft
Paid In Full:

Invoice Recap Table:

Invoice Recap	
Invoice Amount	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00

Bottom Navigation: Details | Adjustments | Specifications | Payments | Notes | Attachments | Notifications

Drag a column header and drop it here to group by that column

Miscellaneous Invoices

- Enter header details (many found on the Pay App for entry)
 8. Payment Explanation = Enter additional information you think will be helpful to the vendor to post the payment. Examples include invoice number, invoice date, and waiver request information
 9. Category = Select either ID (Inter-department) or IF (Free Balance) from the list of values in the drop down
 10. Post to Non-Commitment Costs = Leave as CHECKED
- Save

The screenshot shows the PMWeb application interface for entering Miscellaneous Invoices. The interface includes a navigation pane on the left, a main data entry form, and an invoice recap table on the right. Red circles and numbers 1-10 highlight key fields and actions:

- 1: Change Management menu item
- 2: Invoice # field
- 3: Invoice Date field
- 4: Paid In Full checkbox
- 5: Cost Period dropdown
- 6: Billing Terms dropdown
- 7: Invoice Due date field
- 8: Payment Explanation field
- 9: Category dropdown
- 10: Post to Non-commitment Costs checkbox

The main data entry form contains the following fields:

- Project*: Moyer Cafe
- Company*: 501 CREATIVE INC
- Invoice #: [Empty]
- Invoice Date: May-24-2016
- Description: [Empty]
- Revision: [Empty] Date: May-24-2016
- Workflow Status: Draft
- Paid In Full: [Empty]

The invoice recap table shows the following values:

Invoice Recap	
Invoice Amount	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00

Miscellaneous Invoices

- Add details in details tab
 - Select “Add Items” and drag over appropriate cost codes; save

The screenshot displays the PMWeb interface for creating a Miscellaneous Invoice. The 'Details' tab is active, showing the following information:

- Project:** "DO NOT DELETE" Green Hall 2nd
- Company:** BUSCOMM INC
- Invoice #:** 246TEST
- Invoice Date:** Apr-19-2016
- Description:** (empty)
- Revision:** 0
- Workflow Status:** Draft
- Cost Period:** 05
- Billing Terms:** 10
- Invoice Due:** Apr-29-2016
- Category:** IF (Free Balance)

The 'Invoice Recap' table shows:

Invoice Recap	
Invoice Amount	\$426.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$426.00

The 'Add Items' button is highlighted with a red circle, and the 'Save' button is also highlighted with a red circle. A blue arrow points to the 'Details' tab.

Miscellaneous Invoices

- Enter amounts in Ext Cost field for each cost code
 - Use shortcut: select top row; shift; bottom row; edit
 - Note: Unit Cost and Total Cost fields will auto-populate
- Select Update Records, then Save

The screenshot shows the PMWeb interface for 'Miscellaneous Invoices'. The 'Update Records' button is circled in red. Below it, a table displays invoice data with the 'Ext Cost' column also circled in red.

#	Alt #	Description	Cost Code	UOM	Quantity	Unit Cost	Ext Cost	Total Cost	Adjustment
001	321	180 40 00 Incidentals	03-180-180 40	-- Select --	1.00	\$1,000.00	\$1,000.00	\$1,000.00	
					1.00	\$1,000.00	\$1,000.00	\$1,000.00	

Miscellaneous Invoices

Property Accounting – Review and change remittance address (if necessary)

- The remittance address for miscellaneous invoices is set to default to Addr #1 in the AIS vendor file

Vendor Lookup [Vendor Lookup Help](#)

Vendor Name: (Begins With) SEARS
 SSN/Federal Id: (=)
 Employee ID: (=)
 Student ID: (=)
 Vendor ID: (=)
 *Active Code: (=) Active
 Address Type: (=) Order and Payment Vendors

Search Clear Cancel

Vendor Name	Address Line 1	Address Line 2	Address Line 3	Vendor Type	City, State/Country, Zip	Vendor ID	Addr #	Federal ID	BAA
AL SEARS	-	518 PARKWOODS AVE	-	O	SAINT LOUIS, MO, 631224605	402078	0	-	-
EMMA K SEARSON	-	CAMPUS BOX 5743	-	P	WASHINGTON UNIV, MO, 63105	357991	2	-	-
RENEE LOUISE SEARS	-	333 A NORTH BOYLE AVE	-	P	ST LOUIS, MO, 63108	366362	1	-	-
SEARS COMMERCIAL ONE	ACCT 29 074760 000	3 MID RIVERS MALL DR.	-	O	ST PETERS, MO, 63376	569273	0	****0680	-
SEARS COMMERCIAL ONE	DEPT 53 - 0000163465	P O BOX 78042	-	P	PHOENIX, AZ, 850628042	569273	1	****0680	-
SEARS COMMERCIAL ONE	DEPT 530000163465	P O BOX 689134	-	P	DES MOINES, IA, 503689134	569273	3	****0680	-
SEARS PARTS AND REPAIR CENTER	-	639 B GRAVOIS BLUFFS BLVD	-	O	FENTON, MO, 63026	971647	0	****0680	-
STEPHEN MICHAEL SEARS	-	505 S GROVE ST	-	P	URBANA, IL, 61801	387095	1	-	-



Miscellaneous Invoices

Property Accounting – Review and change remittance address (if necessary)

- Change remittance address if invoice address does not match Addr #1 in vendor file
 - Navigate to Specifications > Additional Payment Information
 - Select line to edit, and select “Edit;” in the “Data” field, insert the number of the remittance address that matches the address on the invoice

The screenshot shows the 'Miscellaneous Invoices' application interface. The 'Specifications' tab is selected, and the 'Additional Payment Information' section is visible. A blue arrow points to the 'Specifications' tab. A red circle highlights the 'Edit' button in the 'Additional Payment Information' section. Another red circle highlights the 'Data' column in the table below.

Spec	UOM	Data	Notes
Vendor Remit Address			

Miscellaneous Invoices

Property Accounting – Review and change remittance address (if necessary)

- Select “Update Records” to Save

The screenshot displays the PMWeb interface for managing Miscellaneous Invoices. The breadcrumb trail is 'Cost Management > Invoices > Miscellaneous Invoices'. The form contains the following fields:

Project*	Melissa's New Office	Cost Period	FY16 Mar
Company*	CROSS RHODES REPROGRAPHIK	Billing Terms*	10
Invoice #*	88888	Invoice Due*	Mar-16-2016
Invoice Date*	May-12-2016	Payment Explanation	
Description		Category*	IF (Free Balance)
Revision	0	Date	May-12-2016
Workflow Status	Draft		
Paid In Full	<input type="checkbox"/>		

The 'Specifications' tab is active, and the 'Update Records' button is circled in red. A blue arrow points to the 'Specifications' tab. The 'Vendor Remit Address' field is visible at the bottom of the form.

Submit record into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot displays a software interface with a left-hand navigation menu and a main content area. The navigation menu includes items like 'Planning', 'Engineering Forms', 'Cost Management', 'Scheduling', 'Asset Management', 'Workflow', 'Portfolio', and 'Toolbox'. The 'Workflow' item is highlighted. The main content area shows a form with fields for 'Description' (This is a test), 'Revision' (0), 'Date' (May-24-2016), 'Workflow Status' (Draft), and 'Category' (IF (Free Balance)). Below these fields are tabs for 'Details', 'Adjustments', 'Specifications', 'Workflow', and 'Notifications'. The 'Workflow' tab is selected, and a large blue arrow points to it with the text 'Workflow tab'. In the 'Workflow Actions' section, there is a list of actions: 'Approve', 'Return', 'DO NOT USE', 'Withdraw (ends workflow)', and 'Delegate'. The 'Submit' button is circled in red.

Submit Record into Workflow

- Select Save
 - You will receive notification re: the status of the workflow

The screenshot displays a software interface for submitting a record into a workflow. On the left, a sidebar menu lists various management tools, with 'Workflow' highlighted. The main area is divided into several sections:

- Actions:** A list of actions including Approve, Return, DO NOT USE, Withdraw (ends workflow), Final Approve, and Delegate. A 'Save' button is circled in red.
- Email Preview:** Shows the subject 'PMWeb Approval Request: Miscellaneous Invoices 12345 - M' and the email body text: 'A document has been Submitted for approval by Maria Moyer.' Below this, 'Workflow Document Information' is displayed, including Document type (Miscellaneous Invoices), Project Name (Moyer Cafe), and Document Description.
- Business Process:** A table showing the workflow steps and participants.

#	Type	All Must Approve?	Due Date	Role	User	Delegate	Instructions	RAM
	✓	<input type="checkbox"/>		-- Submitter --				
1	✓	<input type="checkbox"/>		Project Manager 1	Maria Moyer			
2	✓	<input type="checkbox"/>		Super User	Maria Moyer			
3	✓	<input type="checkbox"/>		Plant Accounting	Maria Moyer			

The logo for PMWeb, featuring the letters 'PM' in a bold, black, sans-serif font, followed by a stylized green 'W' that overlaps the 'M', and 'eb' in a smaller, black, sans-serif font. A registered trademark symbol (®) is located to the upper right of the 'b'. The entire logo is set against a white background with a subtle reflection effect below it.

PMWeb[®] Training

Commitment Change Orders

Commitment Change Orders

- Commitment Change Orders can be initiated in several different ways
 - Option 1 - Generated from an Online Change Request
 - Option 2 - An increase in goods or services on a purchase order prompts a change order to be created when there is not an existing Online Change Request
 - Option 3 - Linking multiple Online Change Requests to one Change Order

Commitment Change Orders – Option

1 Option 1 - Generate a Commitment Change Order from an Online Change Request (There must be a one to one relationship)

- In the Online Change Request screen, select “Generate Change Order”

The screenshot shows the PMWeb software interface. The main window is titled 'Cost Management > Change Management > Online Change Requests'. The 'Generate...' button in the top right is circled in red, with a dropdown menu showing 'Generate Change Event' and 'Generate Change Order'. A blue arrow points to the 'Workflow Status' field, which is set to 'Approved'. Below the form is a table with columns: Line #, Item, Description, UOM, Quantity, Unit Cost, Ext. Cost, Cost Code, and Cost Type.

Line #	Item	Description	UOM	Quantity	Unit Cost	Ext. Cost	Cost Code	Cost Type
001	50	001 00 00 General Requirements		1.00	\$15,000.00	\$15,000.00	01-001-001 00 00	
				1.00	\$15,000.00	\$15,000.00		

6/20/2016

Commitment Change Orders – Option

1

- In the popup window, review line items that will be linked to the Change Order.
- Save

The screenshot displays a software interface for managing change orders. A dialog box titled "Generate Commitment Change Order" is open, featuring "Save" and "Cancel" buttons circled in red. The background interface shows a table with the following data:

Line #	Item	Description	UOM	Quantity	Unit Cost	Ext. Cost
001	50	001 00 00 General R		1.00	\$15,000.00	\$15,000.00

Commitment Change Orders – Option

1

- You will automatically be brought to the Commitment Change Orders screen with your record and the majority of the header details completed

Line #	Item	Description	Amount Requested	Adjustment 1	Adjustment 2	Tax	Amount Approved	Cost Type
001	50	001 00 00 General Requirements	\$15,000.00	\$0.00	\$0.00	\$0.00	\$15,000.00	
			\$15,000.00	\$0.00	\$0.00	\$0.00	\$15,000.00	

Commitment Change Orders – Option

1 Add additional header details

1. Cause = Select the reason for the change from the list of values in the drop down.
NOTE: This should match that of the Online Change Request
2. Requested by = N/A – Leave NULL
3. Reference = Enter the PO# from the Commitment
4. Assigned to = N/A – Leave NULL

PMWeb

- Program/Project Login -

Cost Management > Change Management > Commitment COs

001 - Moyer Cafe - This is a test

Project* Moyer Cafe

Commitment* 002 - ALBERICI CONSTRUCTORS INC -

Company ALBERICI CONSTRUCTORS INC

Type Owner Architect Agr

Record #* 001

Description This is a test

Post As Revised Scope

Revision 0 Date Jun-01-2016

Workflow Status Draft

Change Request 12345 - This is a test

1 Cause SCF - Scope Change (Facilities)

2 Requested By Select Company

3 Reference PO# 89654562

4 Assigned To Select Company

5 Change Order Date Jun-01-2016

6 Effective Date Jun-01-2016

7 Days 0.00

Recap

Original Commitment Amount	\$15,000.00
Prior Approved Changes	\$0.00
Prior Revised Contract	\$15,000.00
Total of This Change	\$15,000.00
Contract to This Change	\$30,000.00

Details Adjustments Specifications Checklists Addenda Notes Attachments (1) Workflow Notifications

Drag a column header and drop it here to group by that column

Commitment Change Orders – Option

- 1 Add additional header details
 5. Change Order Date = Leave defaulted to current date
 6. Effective Date = Select Current Date
 7. Days = If there is an agreement to a schedule change, this will be entered in the Online Change Request, in which the number of days extension will be populated here
- Save

PMWeb®

Program/Project Login - Cost Management > Change Management > Commitment COs

001 - Moyer Cafe - This is a test

Project*	Moyer Cafe	1 Cause	SCF - Scope Change (Facilities)
Commitment*	002 - ALBERICI CONSTRUCTORS INC -	2 Requested By	Select Company
Company	ALBERICI CONSTRUCTORS INC	3 Reference	Lump Sum
Type	Owner Architect Agr	4 Assigned To	PO# 89654562
Record #*	001	5 Change Order Date	Jun-01-2016
Description	This is a test	6 Effective Date	Jun-01-2016
Post As	Revised Scope	7 Days	0.00
Revision	0	Date	Jun-01-2016
Workflow Status	Draft		
Change Request	12345 - This is a test		

Original Commitment Amount	\$15,000.00
Prior Approved Changes	\$0.00
Prior Revised Contract	\$15,000.00
Total of This Change	\$15,000.00
Contract to This Change	\$30,000.00

Recap

Details Adjustments Specifications Checklists Addenda Notes Attachments (1) Workflow Notifications

Drag a column header and drop it here to group by that column

Submit Commitment CO into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot displays the PMWeb software interface for managing Commitment COs. The breadcrumb navigation shows the path: Cost Management > Change Management > Commitment COs. The main form contains the following data:

- Project*: Moyer Cafe
- Commitment*: 002 - ALBERICI CONSTRUCTORS INC.
- Company: ALBERICI CONSTRUCTORS INC.
- Type: Owner Architect Agri
- Record #: 001
- Description: This is a test
- Post As: Revised Scope
- Revision: 0
- Date: Jun-01-2016
- Workflow Status: Draft
- Change Request: 12345 - This is a test
- Cause: SCF - Scope Change (Facilities)
- Requested By: Select Company
- Category: Lump Sum
- Reference: PO# 89654562
- Assigned To: Select Company
- Change Order Date: Jun-01-2016
- Effective Date: Jun-01-2016
- Days: 0.00

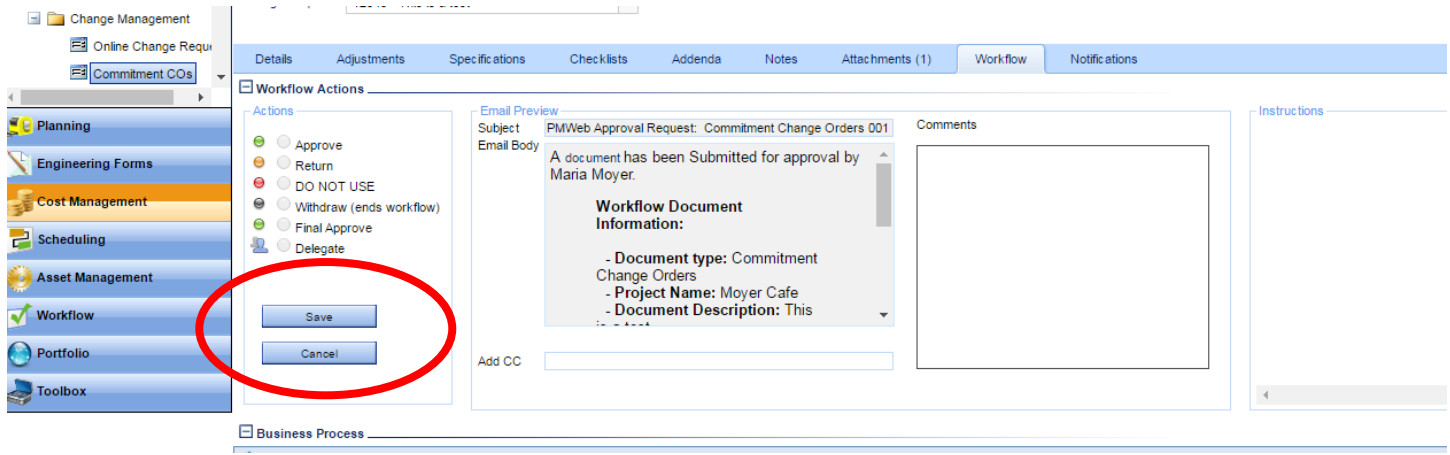
A 'Recap' table is visible on the right side of the form:

Recap	
Original Commitment Amount	\$15,000.00
Prior Approved Changes	\$0.00
Prior Revised Contract	\$15,000.00
Total of This Change	\$15,000.00
Contract to This Change	\$30,000.00

The 'Workflow' tab is selected, and the 'Workflow Actions' section is visible. A red circle highlights the 'Submit' button in the 'Workflow Actions' section. A blue arrow points to the 'Workflow' tab, which is labeled 'Workflow tab'.

Submit Commitment CO into Workflow

- Select Save
 - You will receive notification re: the status of the workflow



Commitment CO Vendor step in Workflow

- Select “Delegate” radio button
- Select the delegate from the list in the pop up window
- Save the assignment and save the workflow step

The screenshot displays a software interface for configuring workflow steps. On the left, under 'Workflow Actions', the 'Delegate' radio button is selected. A blue arrow labeled 'Select Delegate' points to this button. A 'Save' button below the actions is also circled in red. A 'Delegate Step' dialog box is open in the center, with its 'Save' button circled in red. The dialog shows the step name '2.2.1 - Commitment Vendor' and a list of potential delegates. 'Jones - Sam Jones' is selected in the dropdown and has a checked checkbox. Other delegates listed include 'AUSER - Any User', 'charles - Charles Charles', 'emily - Emily Follman', 'emily2 - Emily Rhody', 'kardos - John Kardos', 'KLassus - Karen Lassus', and 'mbaver - Melissa Baver'. The background shows a 'Workflow' tab with various sub-tabs like 'Payments', 'Notes', and 'Attachments (1)'.

Commitment CO Vendor step in Workflow

- Vendors may choose not to use PMWeb
- In this case, the PM will not delegate to the vendor, but will instead email the commitment document to the vendor for signature.
- When the signed document is returned via email, the PM will add the document to the record in PMWeb and approve it as a proxy for the vendor, sending the record on to the next step in workflow

Commitment Change Orders – Option

2

Option 2 - An increase in goods or services on a purchase order prompts a change order to be created when there is not an existing Online Change Request

- Navigate to the Commitment Change Orders Module to create a new Commitment Change Order

Commitment Change Orders – Option

2

- Two ways to navigate to Commitment Change Orders module
 - Cost Management > Commitment Change Order Records sub-category

PMWeb

Cost Management > Change Management > Commitment COs

Drag a column header and drop it here to group by that column

Programs *All* Projects *All*

Project Name	Project #	Record #	Description	Workflow Status	Commitment	Cause
The Lofts Phase II - Plannin	20160028	000001	Short explanation of the cha	Draft	459 -	
Golf Trip Planning	2014615XGLO	000001	CO #1 - Lots of stuff could b	Draft	321 - Lynch Exhibit Test	
Golf Trip Planning	2014615XGLO	000002	Description. Now the contrac	Draft	321 - Lynch Exhibit Test	DE - Designe
* DO NOT DELETE* CSRB	2014615XGLU	000001		Draft	003 - Can you add to this? Y	CA - Contrac
Moyer Cafe	2014615XGMA1	000001	This is a test	Draft	323 - Mechanical work for th	O - Other
Moyer Cafe	2014615XGMA1	000001	additional plumbing needs	Submitted	005 - pedestal sinks	DO - Designe
Moyer Cafe	2014615XGMA1	000001	This is a test	Approved	002 -	SCF - Scope
North Campus Medicine Ph	2014615XGMA6	000001	Additional scope plumbing a	Approved	008906 - renovation for Phy	SCD - Scope
North Campus Medicine Ph	2014615XGMA6	000002		Approved	008906 - renovation for Phy	SCD - Scope
North Campus Medicine Ph	2014615XGMA6	000003	renovation for Physician Bill	Approved	008906 - renovation for Phy	O - Other
North Campus Medicine Ph	2014615XGMA6	000001		Draft	009 - piping	
North Campus Medicine Ph	2014615XGMA6	000002	purchase more pipe	Approved	009 - piping	SCD - Scope
North Campus Medicine Ph	2014615XGMA6	000003		Approved	009 - piping	FC - Field Cc
North Campus Medicine Ph	2014615XGMA6	000001		Approved	0010 - demo of storage sho	FC - Field Cc

Commitment Change Orders

Cost Management

Commitment Change Orders – Option

2

- Two ways to navigate to Commitment Change Orders module

- Project Center > Select Commitment Change Orders hyperlink

The screenshot shows the PMWeb software interface. The breadcrumb navigation path is: Cost Management > Change Management > Online Change Requests. The 'Project Center' tab is selected. The 'Engineering Forms' section is expanded, showing a list of record types with 'Pending' and 'Approved' counts. The 'Commitment COs' record type is circled in red. The 'Cost Management' section is also expanded, showing a list of record types with 'Pending' and 'Approved' counts. The 'Commitment COs' record type is circled in red.

Record Type	Pending	Approved
Action Items	0	0
Correspondence	0	0
Daily Reports	0	0
Drawing Lists	0	0
Drawing Sets	0	0
Meeting Minutes	0	0
Online Submittals	0	0
Punch Lists	0	0
RFIs	0	0
Safety Forms	0	0
Submittal Sets	0	0
Submittal Items	0	0
Transmittals	0	0
Emergency Form	0	0

Record Type	Pending	Approved
A/P Payments	0	0
Budget Requests	1	1
Commitment COs	0	0
Cost Codes	0	1

Commitment Change Orders – Option

2

- Add a new Commitment Change Order record

The screenshot displays the PMWeb software interface. The breadcrumb navigation path is "Cost Management > Change Management > Commitment COs". The interface includes a left-hand navigation tree with categories like Budgets, Contracts, Change Management, and Cost Management. The main area shows a table of Commitment Change Order records. A red circle highlights the "+ Add" button in the toolbar above the table.

Project Name	Project #	Record #	Description	Workflow Status	Commitment	Cause	Contract
The Lofts Phase II - Plannin	20160028	000001	Short explanation of the cha	Draft	459 -		
Golf Trip Planning	2014615XGLO	000001	CO #1 - Lots of stuff could b	Draft	321 - Lynch Exhibit Test		
Golf Trip Planning	2014615XGLO	000002	Description. Now the contr	Draft	321 - Lynch Exhibit Test	DE - Designer Error	
* DO NOT DELETE* CSR	2014615XGLU	000001		Draft	003 - Can you add to this? Y	CA - Contract Assign	
Moyer Cafe	2014615XGMA1	000001	This is a test	Approved	002 -	SCF - Scope Change	12345 -
North Campus Medicine Ph	2014615XGMA6	000001	Additional scope plumbing c	Approved	008906 - renovation for Phy	SCD - Scope Change	
North Campus Medicine Ph	2014615XGMA6	000002		Approved	008906 - renovation for Phy	SCD - Scope Change	
North Campus Medicine Ph	2014615XGMA6	000003	renovation for Physician Bill	Approved	008906 - renovation for Phy	O - Other	
North Campus Medicine Ph	2014615XGMA6	000001		Draft	009 - piping		
North Campus Medicine Ph	2014615XGMA6	000002	purchase more pipe	Approved	009 - piping	SCD - Scope Change	
North Campus Medicine Ph	2014615XGMA6	000003		Approved	009 - piping	FC - Field Condition	002 -
North Campus Medicine Ph	2014615XGMA6	000001		Approved	0010 - demo of storage shel	FC - Field Condition	002 -
16012 Dr. Dubberke Lab Re	2014615	000001	Additional Design Services	Draft	003 - Architect Agreement	SCD - Scope Change	001 - A
16012 Dr. Dubberke Lab Re	2014615	000001		Draft	314 - Engineer Agreement		

Commitment Change Orders – Option

2

• Add header details

1. Project* = Select the project
2. Commitment* = Select the commitment. NOTE: The next field “Company” will auto-populate based upon the commitment selected.
3. Company = Will auto-populate once record is saved – Leave NULL for entry
4. Type = Will auto-populate once record is saved – Leave NULL for entry
5. Record # = Will auto-populate with the next number in sequence once the record has been saved

PMWeb

Program/Project Login - Cost Management > Change Management > Commitment COs

001 - Moyer Cafe - additional plumbing needs

1 Project* Moyer Cafe

2 Commitment* 005 - GRAINGER INC - pedestal sinks

3 Company GRAINGER INC

4 Type Purchase Order

5 Record #* 001

6 Description additional plumbing needs

7 Post As Revised Scope

8 Revision 0

9 Date Jun-02-2016

10 Workflow Status Draft

11 Change Request Select Change Request...

12 Cause DO - Designer Omission

13 Requested By Select Company

14 Category Lump Sum

15 Reference 563456

16 Assigned To Select Company

17 Change Order Date Jun-02-2016

18 Effective Date Jun-02-2016

19 Days 0.00

Recap	
Original Commitment Amount	\$5,000.0
Prior Approved Changes	\$0.0
Prior Revised Contract	\$5,000.0
Total of This Change	\$0.0
Contract to This Change	\$5,000.0

Commitment Change Orders – Option

2

• Add header details

6. Description = Enter a brief explanation of the change
7. Post As = Leave set to default value of “Revised Scope”
8. Revision = Auto-populated. Will change if the record needs to be revised
9. Date = Will auto-populate with current date once record is saved
10. Workflow = Inaccessible field - Will remain in “Draft” phase until change order is approved in workflow
11. Change Request = N/A = Leave NULL

PMWeb - Program/Project Login - Cost Management > Change Management > Commitment COs

001 - Moyer Cafe - additional plumbing needs

1 Project*	Moyer Cafe	12 Cause	DO - Designer Omission
2 Commitment*	005 - GRAINGER INC - pedestal sinks	13 Requested By	Select Company
3 Company	GRAINGER INC	14 Category	Lump Sum
4 Type	Purchase Order	15 Reference	563456
5 Record #*	001	16 Assigned To	Select Company
6 Description	additional plumbing needs	17 Change Order Date	Jun-02-2016
7 Post As	Revised Scope	18 Effective Date	Jun-02-2016
8 Revision	0	19 Days	0.00
9 Date	Jun-02-2016		
10 Workflow Status	Draft		
11 Change Request	Select Change Request...		

Recap

Original Commitment Amount	\$5,000.0
Prior Approved Changes	\$0.0
Prior Revised Contract	\$5,000.0
Total of This Change	\$0.0
Contract to This Change	\$5,000.0

Commitment Change Orders – Option

2

• Add header details

12. Cause = Select the reason for the change from the list of values in the drop down
13. Requested by = N/A – Leave NULL
14. Category = Select the terms of the cost from the contractor. NOTE: If multiple Online Change Requests will be linked to the Change Order select “Multiple”
15. Reference = Enter the PO# from the commitment
16. Assigned to = N/A = Leave NULL
17. Change Order Date = Set to current date

PMWeb

Cost Management > Change Management > Commitment COs

001 - Moyer Cafe - additional plumbing needs

1 Project* Moyer Cafe

2 Commitment* 005 - GRAINGER INC - pedestal sinks

3 Company GRAINGER INC

4 Type Purchase Order

5 Record #* 001

6 Description additional plumbing needs

7 Post As Revised Scope

8 Revision 0

9 Date Jun-02-2016

10 Workflow Status Draft

11 Change Request Select Change Request...

12 Cause DO - Designer Omission

13 Requested By Select Company

14 Category Lump Sum

15 Reference 563456

16 Assigned To Select Company

17 Change Order Date Jun-02-2016

18 Effective Date Jun-02-2016

19 Days 0.00

Recap	
Original Commitment Amount	\$5,000.0
Prior Approved Changes	\$0.0
Prior Revised Contract	\$5,000.0
Total of This Change	\$0.0
Contract to This Change	\$5,000.0

Commitment Change Orders – Option

2

- Add header details

 - 18. Effective Date = Set to current date

 - 19. Days = If there is an agreement to a schedule change, this should be entered as an Online Change Request, which will then be linked to this Change Order and the number of days extension should be populated here

- Save

The screenshot shows the PMWeb interface for creating a Commitment Change Order. The breadcrumb trail is "Cost Management > Change Management > Commitment COs". The main form contains the following fields:

- 1 Project*: Moyer Cafe
- 2 Commitment*: 005 - GRAINGER INC - pedestal sinks
- 3 Company: GRAINGER INC
- 4 Type: Purchase Order
- 5 Record #: 001
- 6 Description: additional plumbing needs
- 7 Post As: Revised Scope
- 8 Revision: 0
- 9 Date: Jun-02-2016
- 10 Workflow Status: Draft
- 11 Change Request: Select Change Request...
- 12 Cause: DO - Designer Omission
- 13 Requested By: Select Company
- 14 Category: Lump Sum
- 15 Reference: 563456
- 16 Assigned To: Select Company
- 17 Change Order Date: Jun-02-2016
- 18 Effective Date: Jun-02-2016
- 19 Days: 0.00

The Recap table on the right shows:

Recap	
Original Commitment Amount	\$5,000.0
Prior Approved Changes	\$0.0
Prior Revised Contract	\$5,000.0
Total of This Change	\$0.0
Contract to This Change	\$5,000.0

Commitment Change Orders – Option

2

- Select “add items” to open the “items” window
- Drag over cost codes for those that are now being modified from the original commitment
- Save

The screenshot displays the PMWeb interface for managing Commitment Change Orders. The main window shows details for a commitment change order for 'Moyer Cafe'. The 'Details Tab' is selected, and the 'Add Items' button is circled in red. Below the details, a table lists items with columns for Line #, Item, Description, Amount, and Type. The table contains two rows of items, with a total amount of \$3,500.00. A blue arrow points to the 'Details Tab' in the left sidebar. An 'Items' window is open in the foreground, showing a list of cost codes and a 'Save' button circled in red.

Line #	Item	Description	Amount	Type
001	52	002 00 00 Existing Conditions	\$1,000.00	
002	160	023 00 00 Heating, Ventilating, and Ai	\$2,500.00	
			\$3,500.00	

Commitment Change Orders – Option

2

- Select “edit”
 - If multiple lines, use shortcut: select top row; shift; bottom row; edit

The screenshot displays the PMWeb interface for a Commitment Change Order (CO). The left sidebar shows a navigation menu with categories like Budgets, Contracts, and Change Management. The main area is titled '001 - Moyer Cafe - additional plumbing needs' and contains a form with various fields such as Project*, Commitment*, Company, Type, Record #, Description, Post As, Revision, Date, Workflow Status, and Change Request. A 'Recap' table is visible on the right side of the form.

Below the form is a table with columns: Line #, Item, Description, Amount Requested, Adjustment 2, Tax, Amount Approved, and Cost Type. The table contains one row with the following data:

Line #	Item	Description	Amount Requested	Adjustment 2	Tax	Amount Approved	Cost Type
001	154	022 00 00 Plumbing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

The 'Edit' button in the table's toolbar is circled in red. A blue arrow labeled 'Details Tab' points to the 'Details' tab in the table's header.

Commitment Change Orders – Option

2

- Enter the change in the “Amount Requested” field.
 - Note that the “Amount Approved” field will auto-populate with the same value.
- Select “Update Records” to save

The screenshot shows the PMWeb interface for a Commitment Change Order (CO). The form is titled "001 - Moyer Cafe - additional plumbing needs". The "Details" tab is active, and a blue arrow points to the "Update Records" button. The table below shows the change details:

Line #	Description	Amount Requested	Adjustment 1	Adjustment 2	Tax	Amount Approved	Cost Type
001	154 022 00 00 Plumbing	\$15,000.00	\$0.00	\$0.00	\$0.00	15000.00	-- Select --
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

The "Amount Requested" and "Amount Approved" fields in the table are circled in red. The "Update Records" button is also circled in red.

Commitment Change Orders – Option

2

- On “Attachments” tab, use quick file upload
- Upload any back-up documents
- Save

The screenshot displays the PMWeb software interface for managing Commitment Change Orders (COs). The left sidebar shows a navigation menu with categories like Budgets, Contracts, Change Management, and Commitment COs. The main window is titled "001 - Moyer Cafe - additional plumbing needs" and shows various fields for project details, including Project*, Commitment*, Company, Type, Record #, Description, Post As, Revision, Date, Workflow Status, and Change Request. The "Attachments" tab is selected, and a blue arrow points to it with the text "Attachments Tab". Below the tab, there is a "Quick File Upload" button circled in red. Underneath this button, a text box says "Select multiple files to upload or drop files in the box below" with a "Select" button also circled in red. The top toolbar contains several icons, with a red circle around the Attachments icon.

Submit Commitment CO into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot displays the PMWeb software interface for managing Commitment COs. The breadcrumb navigation shows 'Cost Management > Change Management > Commitment COs'. The main form contains the following data:

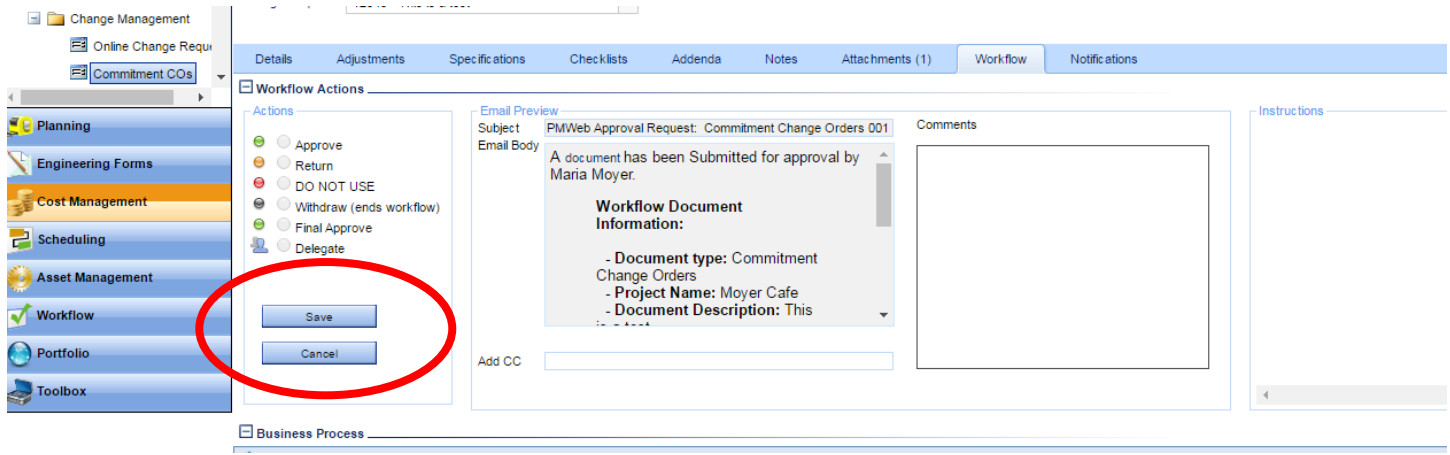
Project*	Moyer Cafe	Cause	SCF - Scope Change (Facilities)
Commitment*	002 - ALBERICI CONSTRUCTORS INC -	Requested By	Select Company
Company	ALBERICI CONSTRUCTORS INC	Category	Lump Sum
Type	Owner Architect Agri	Reference	PO# 89654562
Record #*	001	Assigned To	Select Company
Description	This is a test	Change Order Date	Jun-01-2016
Post As	Revised Scope	Effective Date	Jun-01-2016
Revision	0	Date	Jun-01-2016
Workflow Status	Draft	Days	0.00
Change Request	12345 - This is a test		

The 'Workflow' tab is selected, and the 'Submit' button in the 'Workflow Actions' section is circled in red. A blue arrow points to the 'Workflow' tab label.

Recap	
Original Commitment Amount	\$15,000.00
Prior Approved Changes	\$0.00
Prior Revised Contract	\$15,000.00
Total of This Change	\$15,000.00
Contract to This Change	\$30,000.00

Submit Commitment CO into Workflow

- Select Save
 - You will receive notification re: the status of the workflow



Commitment CO Vendor step in Workflow

- Select “Delegate” radio button
- Select the delegate from the list in the pop up window
- Save the assignment and save the workflow step

Select Delegate

Workflow Actions

Actions

- Approve
- Return
- DO NOT USE
- Withdraw (ends workflow)
- Final Approve
- Delegate

Team Input (0)

Save

Business Process

Refresh

Delegate Step

Save Cancel

Step: 2.2.1 - Commitment Vendor

Approver: 1353539958 - Emily Follman

Current Delegate: -- None --

Delegate To: jones - Sam Jones

Delegate All of My Steps

Alert Delegate

Message

- AUSER - Any User
- charles - Charles Charles
- emily - Emily Follman
- emily2 - Emily Rhody
- Jones - Sam Jones
- kardos - John Kardos
- KClassus - Karen Lassus
- mbaver - Melissa Baver

Delegate 1-83 out of 83

Payments Notes Attachments (1) Workflow

Instructions

Commitment CO Vendor step in Workflow

- Vendors may choose not to use PMWeb
- In this case, the PM will not delegate to the vendor, but will instead email the commitment document to the vendor for signature.
- When the signed document is returned via email, the PM will add the document to the record in PMWeb and approve it as a proxy for the vendor, sending the record on to the next step in workflow

Commitment Change Orders – Option

3

Option 3 - Linking multiple existing Online Change Requests to one Commitment Change Order

- Follow the same steps as generating a Commitment Change Order without an existing Online Change Request
 - In the details section you will link any applicable Online Change Requests to the Change Order
 - Cost codes associated with those Online Change Requests' s will be pulled into the Commitment Change Order

Commitment Change Orders – Option

3

- Select “Link Online Change Request(s)”
- Select from the list of existing Online Change Requests; Save

The screenshot displays the PMWeb software interface. The main window shows a form for '001 - Moyer Cafe - This is a test'. The 'Link Contractor Potential Change Orders' dialog box is open, showing a table of existing Online Change Requests (OCRs). The 'Link Online Change Request(s)' button in the main form is circled in red, and the 'Save' button in the dialog box is also circled in red.

select	Status	OCR #	Description	Requested Date	Needed By	Reason
<input type="checkbox"/>		001	This is a test	Jun-02-2016	Jun-02-2016	DE - Designer Error
<input type="checkbox"/>		002	This is a test - heating ventilation	Jun-02-2016	Jun-02-2016	FC - Field Condition

Commitment Change Orders – Option

3

- Cost codes and amounts of existing Online Change Orders are added to your details tab
- Save

The screenshot displays the PMWeb software interface for managing Commitment Change Orders (COs). The main window shows the details for a CO titled "001 - Moyer Cafe - This is a test". The interface includes a navigation pane on the left, a top toolbar with a red circle around the save icon, and a main data entry area. A summary table on the right provides a recap of commitment amounts. At the bottom, a table lists the items associated with the CO, with a red circle around the table area.

Recap

Original Commitment Amount	\$35,000.00
Prior Approved Changes	\$0.00
Prior Revised Contract	\$35,000.00
Total of This Change	\$3,500.00
Contract to This Change	\$38,500.00

Item #	Item	Description	Amount Requested	Adjustment 1	Adjustment 2	Tax	Amount Approved	Cost Type
001	52	002 00 00 Existing Conditions	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00	
002	160	023 00 00 Heating, Ventilating, and Air	\$2,500.00	\$0.00	\$0.00	\$0.00	\$2,500.00	
			\$3,500.00	\$0.00	\$0.00	\$0.00	\$3,500.00	

Submit Commitment CO into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot displays the PMWeb software interface for managing Commitment COs. The breadcrumb navigation shows 'Cost Management > Change Management > Commitment COs'. The main form contains the following data:

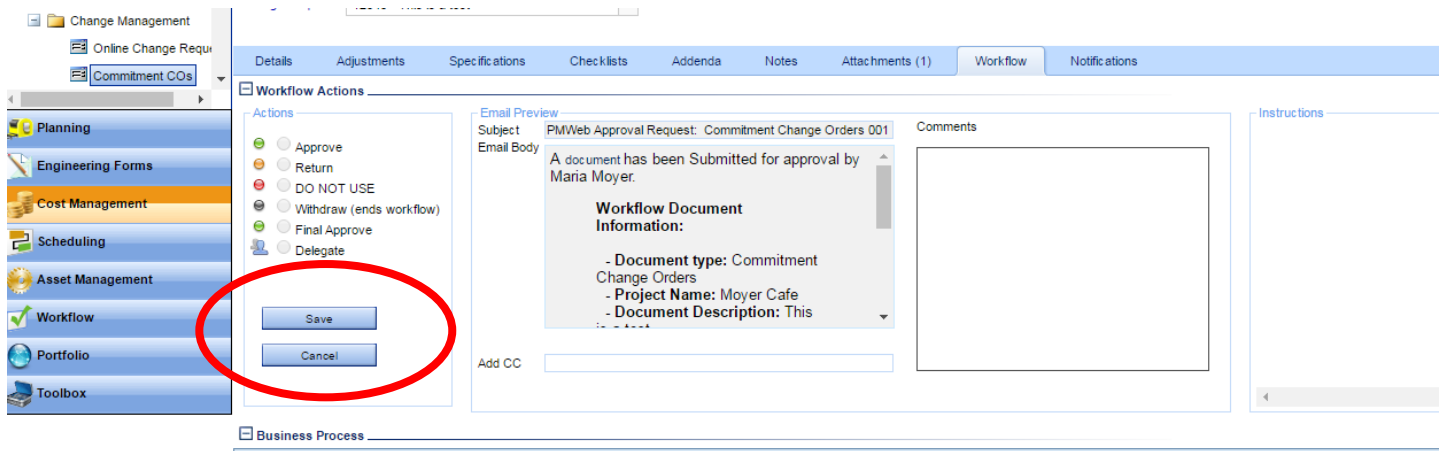
Project*	Moyer Cafe	Cause	SCF - Scope Change (Facilities)
Commitment*	002 - ALBERICI CONSTRUCTORS INC -	Requested By	Select Company
Company	ALBERICI CONSTRUCTORS INC	Category	Lump Sum
Type	Owner Architect Agri	Reference	PO# 89654562
Record #*	001	Assigned To	Select Company
Description	This is a test	Change Order Date	Jun-01-2016
Post As	Revised Scope	Effective Date	Jun-01-2016
Revision	0	Date	Jun-01-2016
Workflow Status	Draft	Days	0.00
Change Request	12345 - This is a test		

The 'Workflow' tab is selected, and the 'Workflow Actions' section is visible. A red circle highlights the 'Submit' button. A blue arrow points to the 'Workflow' tab label.

Original Commitment Amount	\$15,000.00
Prior Approved Changes	\$0.00
Prior Revised Contract	\$15,000.00
Total of This Change	\$15,000.00
Contract to This Change	\$30,000.00

Submit Commitment CO into Workflow

- Select Save
 - You will receive notification re: the status of the workflow



Commitment CO Vendor step in Workflow

- Select “Delegate” radio button
- Select the delegate from the list in the pop up window
- Save the assignment and save the workflow step

Select Delegate

Workflow Actions

Actions

- Approve
- Return
- DO NOT USE
- Withdraw (ends workflow)
- Final Approve
- Delegate

Team Input (0)

Save

Business Process

Refresh

Delegate Step

Save Cancel

Step: 2.2.1 - Commitment Vendor

Approver: 1353539958 - Emily Follman

Current Delegate: -- None --

Delegate To: jones - Sam Jones

Delegate All of My Steps

Alert Delegate

Message

- AUSER - Any User
- charles - Charles Charles
- emily - Emily Follman
- emily2 - Emily Rhody
- Jones - Sam Jones
- kardos - John Kardos
- KClassus - Karen Lassus
- mbaver - Melissa Baver

Delegate 1-83 out of 83

Payments Notes Attachments (1) Workflow

Instructions

Commitment CO Vendor step in Workflow

- Vendors may choose not to use PMWeb
- In this case, the PM will not delegate to the vendor, but will instead email the commitment document to the vendor for signature.
- When the signed document is returned via email, the PM will add the document to the record in PMWeb and approve it as a proxy for the vendor, sending the record on to the next step in workflow

The logo for PMWeb, featuring the letters 'PM' in black, a green stylized 'W' that overlaps the 'M', and 'eb' in black. A registered trademark symbol (®) is located to the upper right of the 'b'. The logo is reflected below it.

PMWeb® Training

Progress Invoices

Progress Invoices

- Two ways to navigate to Progress Invoices module
 - Cost Management > Progress Invoices sub-category

PMWeb®

- Program/Project Login -

Cost Management > Invoices > Progress Invoices

Drag a column header and drop it here to group by that column

Programs *All* Projects *All* + Add X Delete Refresh Layouts

Project Name	Project #	Record #	Invoice #	Description	Workflow Status	Commitment	Period	Co
Connie Test1 *DO NOT DEL	20160050	LW3	4		Draft	317 -		TAI
Connie Test1 *DO NOT DEL	20160050	APP1	1	PO#111111M	Approved	317 -	03	TAI
Connie Test1 *DO NOT DEL	20160050	APP2	2	PO#222222X	Approved	317 -	016	TAI
Connie Test1 *DO NOT DEL	20160050	APP3	3	PO#333333X	Approved	317 -	05	TAI
Connie Test1 *DO NOT DEL	20160050	APP6	6		Approved	317 -	07	TAI
Connie Test1 *DO NOT DEL	20160050	APP5R	7		Approved	317 -	06	TAI
Connie Test1 *DO NOT DEL	20160050	APP4	8	PO#444444X	Approved	317 -	04	TAI
Connie Test1 *DO NOT DEL	20160050	App7	9	PO#23456X	Approved	317 -	06	TAI
Connie Test1 *DO NOT DEL	20160050	APP5	5		Withdrawn	317 -		TAI
DO NOT DELETE Jen L	20160051	App1	1	What is this for	Draft	316 -		Hill
DO NOT DELETE Jen L	20160051	App3	3	What is this for	Draft	316 -		Hill
DO NOT DELETE Jen L	20160051	App5	5	What is this for	Draft	316 -		Hill
DO NOT DELETE Jen L	20160051	LW1	6	What is this for	Draft	316 -		Hill
DO NOT DELETE Jen L	20160051	App6	7	What is this for	Draft	316 -		Hill
DO NOT DELETE Jen L	20160051	App7	8	What is this for	Draft	316 -		Hill

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Progress Invoices

- Two ways to navigate to Progress Invoices module
 - Project Center > Select Progress Invoices hyperlink

The screenshot displays the PMWeb application interface. The left sidebar contains a navigation menu with categories: Planning, Engineering Forms, Cost Management (highlighted), Scheduling, Asset Management, Workflow, and Portfolio. Under 'Cost Management', 'Progress Invoices' is highlighted with a red circle. The main content area shows the 'Project Center' tab selected, with a 'Miscellaneous Invoices' sub-tab. A table lists various record types with columns for 'Pending' and 'Approved' counts. The 'Progress Invoices' row is circled in red.

Record Type	Pending	Approved
A/P Payments	0	0
Budget Requests	1	1
Budgets	0	1
Commitment COs	0	0
Commitments	1	4
Cost Codes	0	1
Forecasts	1	0
Funding Authorizations	0	0
Funding Records	1	2
Funding Requests	0	0
Miscellaneous Invoices	0	0
Change Requests	0	0
Progress Invoices	6	2
Apprentices	0	0

Progress Invoices

- Add a new invoice record

The screenshot displays the PMWeb interface for 'Miscellaneous Invoices'. The table contains the following data:

Project Name	Project #	Record #	Description	Workflow Status	Company	Reference	Category	Period
DO NOT DELETE Jen Li	20160051	012345	Test Misc Invoice	Draft	GRAINGER INC		IF (Free Balance)	04
DO NOT DELETE Jen Li	20160051	041916misc1	Test of Misc	Draft	Hill PCI Group		IF (Free Balance)	02
DO NOT DELETE Green I	2014615XGLK	041916misc3	this is fun	Approved	LITE SOURCE INC		IF (Free Balance)	05
DO NOT DELETE Green I	2014615XGLK	246TEST		Draft	BUSCOMM INC		IF (Free Balance)	05
DO NOT DELETE CSR	2014615XGLU	041916misc1	where does this go	Approved	Hill PCI Group		IF (Free Balance)	FY16 Mar
DO NOT DELETE CSR	2014615XGLU	Test001		Approved	SURDEX CORPORATIO		IF (Free Balance)	FY16 Apr
DO NOT DELETE CSR	2014615XGLU	041916misc2	where will this go misc2	Approved	TELECOMM & COMPUT		IF (Free Balance)	FY16 Mar
DO NOT DELETE CSR	2014615XGLU	12345578887788 8881misc3	Test of a long invoice # and	Approved	Moonrise Hotel		IF (Free Balance)	FY16 May
DO NOT DELETE CSR	2014615XGLU	Anothermisc	where does this show up?	Approved	MATERIALS RESEARCH		IF (Free Balance)	FY16 Apr
DO NOT DELETE CSR	2014615XGLU	123456aa	123456aa	Approved	ABC Drive Co		IF (Free Balance)	FY16 Mar
DO NOT DELETE CSR	2014615XGLU	prop12		Approved	MICROSOFT CORPOR	Another property one	IF (Free Balance)	
DO NOT DELETE CSR	2014615XGLU	prop13		Approved	BMC SOFTWARE INC	test for property	IF (Free Balance)	
Danforth University Center 1	2013907	1724460	Reimbursement for mainten	Approved	Washington University D		ID (Inter-Departmental)	FY16 Jul
Danforth University Center 1	2013907	005472		Approved	CROSS RHODES REPR		IF (Free Balance)	FY16 Jul
Brown School of Social Work	2011921	142130		Approved	Moonrise Hotel		IF (Free Balance)	FY16 Jul
Brown School of Social Work	2011921	142038		Approved	Moonrise Hotel		IF (Free Balance)	FY16 Jul

Progress Invoices

- Select the project
- Select the company
 - Type in the dropdown field or select the magnifying glass for a list; save

Project*

Commitment*

Company 002 - ALBERICI CONSTRUCTORS INC -

Description*

Payment Explanation

Funding

Sequence #

Record #*

Revision

Workflow Status

Cost Period*

Category*

Paid In Full

Details

Drag a column

Refresh

Cost Management

Progress Invoices

Contract Snapshot

Original Value	\$0.00
Approved Changes	\$0.00
Revised Value	\$0.00
Invoiced	\$0.00
Retained	\$0.00
Earned Less Retainage	\$0.00
Less Prior Invoices	\$0.00
Current Payment Due	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00
Bal. To Finish (incl. Retainage)	\$0.00

Progress Invoices

- Enter header details (many found on the Pay App for entry)
 1. Description = Text “PO#” will auto-populate in this field. Enter the PO # following this text
 - NOTE: When the PO# is entered on the first progress invoice, this will get copied over to all subsequent invoices for the same commitment.
 2. Payment Explanation = Enter additional information that will be helpful to the vendor to post the payment. Examples include invoice number, invoice date, and waiver request information.
 3. Record # = Enter the Vendor Invoice # in this field; the format for payment applications should be the WU project number + “APP”+ pay app # (i.e. 2016955APP01)

6/20/

6

7

8

9

10

1

2

3

4

5

6

Progress Invoices

- Enter header details (many found on the Pay App for entry)
 4. Cost Period = Enter the date of which the work incurred – this feeds into the Cash Flow and Accrual Reporting
 5. Category = Auto-populated to “CA (Computer Assisted Invoice)”
 6. Paid in Full = Leave un-checked
 7. Invoice Date = Date of the Architect Certification for Pay Apps – For all other types of invoices, it is the actual date of the invoice

6/20/20

Master Commitments
Commitments
Change Management
Online Change Request
Commitment COs
Funding
Funding Records
Funding Requests
Funding Authorization
Invoices
Miscellaneous Invoices
Progress Invoices
Payments
A/P Payments

- Program/Project Login - Cost Management > Invoices > Progress Invoices

002 - Moyer Cafe - ALBERICI CONSTRUCTORS INC -

Project* Moyer Cafe
Commitment* 002 -
Company ALBERICI CONSTRUCTORS INC
Description* PO#
Payment Explanation
Sequence # 2
Record #* 251
Revision 0 Date May-24-2016
Workflow Status Draft
Cost Period* -- Select --
Category* CA (Computer Assisted Invoice)
Paid In Full

Online Invoice
Invoice Date* May-24-2016
Billing Terms* 30
Invoice Due* Jun-23-2016
Invoice Type* -- Select --
Contact
Comment
Print Lien Waiver
 Signed and Notarized Lien Waiver attached

Create Next

Progress Invoices

- Enter header details (many found on the Pay App for entry)
 8. Billing Terms = This value represents days, and will auto populate based upon the vendor set up. If this is an MBE/WBE vendor or sub-contractor, this will auto-populate to 10; otherwise this field will be a 30. NOTE: Only Mary Price will update this field
 9. Invoice Date = This field is informational only. This date will represent the Invoice Date + the value in the Billing Terms

The screenshot displays the 'Progress Invoices' application window. The title bar shows the path: 'Cost Management > Invoices > Progress Invoices'. The main window is titled '002 - Moyer Cafe - ALBERICI CONSTRUCTORS INC'. The left sidebar contains a navigation tree with categories like 'Master Commitments', 'Change Management', 'Funding', 'Invoices', and 'Payments'. The 'Progress Invoices' option is highlighted. The main form area contains the following fields and values:

Project*	Moyer Cafe	Online Invoice	
Commitment*	002 -	7 Invoice Date*	May-24-2016
Company	ALBERICI CONSTRUCTORS INC	8 Billing Terms*	30
Description*	PO#	9 Invoice Due*	Jun-23-2016
Payment Explanation		10 Invoice Type*	-- Select --
Sequence #	2	Contact	
Record #*	251	Comment	
Revision	0		
Workflow Status	Draft		
Cost Period*	-- Select --		
Category*	CA (Computer Assisted I		
Paid In Full	<input type="checkbox"/>		

Additional elements include a 'Create Next' button, a 'Print Lien Waiver' button, and a checkbox for 'Signed and Notarized Lien Waiver attached'. Red numbered callouts (1-10) are placed over the form fields to correspond with the list items above.

Progress Invoices

- Enter header details (many found on the Pay App for entry)
 10. Invoice Type = Select “Final” if it is the last or only invoice on a commitment. Select “Progress” if there will be more than one invoice on the commitment.
 - NOTE: If “Final” is selected and the Print Lien Waiver button is clicked, the final lien waiver report will be generated. If “Progress” is selected and the Print Lien Waiver is selected, then the Progress Lien Waiver form is generated.

- Save

The screenshot shows a software interface for entering invoice details. The main form is titled "002 - Moyer Cafe - ALBERICI CONSTRUCTORS INC -". The form fields are as follows:

Field	Value
Project*	Moyer Cafe
Commitment*	002 -
Company	ALBERICI CONSTRUCTORS INC
Description*	PO#
Payment Explanation	
Sequence #	2
Record #*	251
Revision	0
Workflow Status	Draft
Cost Period*	-- Select --
Category*	CA (Computer Assisted I
Paid In Full	<input type="checkbox"/>
Invoice Date*	May-24-2016
Billing Terms*	30
Invoice Due*	Jun-23-2016
Invoice Type*	-- Select --

The form also includes a "Create Next" button, a "Print Lien Waiver" button, and a checkbox for "Signed and Notarized Lien Waiver attached".

Progress Invoices

- Add details – Note: Line items from the commitment are already populated in the details record
- Use shortcut: select top row; shift; bottom row; edit

The screenshot displays the PMWeb interface for 'Progress Invoices'. The top navigation bar shows 'Cost Management > Invoices > Progress Invoices'. The main content area is split into three sections: 'Online Invoice' details, 'Contract Snapshot', and a table of invoice line items.

Online Invoice Details:

- Project*: Moyer Cafe
- Commitment*: 002 -
- Company: ALBERICI CONSTRUCTORS INC
- Description*: PO#
- Payment Explanation: test
- Sequence #: 1
- Record #: 250
- Revision: 0
- Workflow Status: Draft
- Cost Period*: FY16 Apr
- Category*: CA (Computer Assisted II)
- Date: May-23-2016

Contract Snapshot:

Original Value	\$15,000.00
Approved Changes	\$0.00
Revised Value	\$15,000.00
Invoiced	\$0.00
Retained	\$0.00
Earned Less Retainage	\$0.00
Less Prior Invoices	\$0.00
Current Payment Due	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00
Bal. To Finish (incl. Retainage)	\$15,000.00

Invoice Line Items Table:

Line #	Cost Code	Description	SubContract	Direct Pay?	Scheduled Value	COO #	Prior Invoices	Current Invoice	Total Invoiced	% Complete	Balance to Invoice	Current Service Retain Amount
001	01-003-003 00 00	003 00 00 Concret			\$10,000.00		\$0.00	\$0.00	\$0.00	0.00%	\$10,000.00	\$0.00
002	01-005-005 00 00	005 00 00 Metals			\$5,000.00		\$0.00	\$0.00	\$0.00	0.00%	\$5,000.00	\$0.00
					\$15,000.00		\$0.00	\$0.00	\$0.00		\$15,000.00	\$0.00

Progress Invoices

- Enter amounts in the “Current Invoice” column
 - NOTE: Only enter the costs for the line items being charged at this time
- % Complete and Balance to Invoice values will auto-calculate

Details tab

Commitment* 002 -
Company ALBERICI CONSTRUCTORS INC
Description* PO#
Payment Explanation test
Sequence # 1
Record #* 250
Revision 0 Date May-23-2016
Workflow Status Draft
Cost Period* FY16 Apr
Category* CA (Computer Assisted In...
Paid In Full

Billing Terms* 30
Invoice Due* May-31-2016
Invoice Type* Progress
Contact
Comment
Print Lien Waiver
Signed and Notarized Lien Waiver attached

Approved Changes \$0.00
Revised Value \$15,000.00
Invoiced \$0.00
Retained \$0.00
Earned Less Retainage \$0.00
Less Prior Invoices \$0.00
Current Payment Due \$0.00
Unapplied Payments Available \$0.00
Payments Applied \$0.00
Open Balance \$0.00
Bal. To Finish (incl. Retainage) \$15,000.00

Line #	Cost Code	Description	SubContractor	Direct Pay?	Scheduled Value	CCO #	Prior Invoices	Current Invoice	Total Invoiced	% Complete	Balance to Invoice	Current Service Retain Amount
001	01-003-003 00 00	003 00 00 Concrete			\$10,000.00		\$0.00	\$0.00	\$0.00	0.00%	\$10,000.00	\$0.00
002	01-005-005 00 00	005 00 00 Metals			\$5,000.00		\$0.00	\$0.00	\$0.00	0.00%	\$5,000.00	\$0.00
					\$15,000.00		\$0.00	\$0.00	\$0.00		\$15,000.00	\$0.00

Progress Invoices

Note: Next steps will typically only be entered for Pay Apps

- Two ways to look up Subcontractor

- Drop down arrow to bring up list and search the company for that line item

us Invoice: Draft
Cost Period*: FY16 Apr
Category*: CA (Computer Assisted I
Paid In Full

Details Adjustments Specifications Checklists

Drag a column header and drop it here to group by that column

Update Records Cancel

Line #	Cost Code	Description							
001	01-003-003 00 00	003 00 00 Concrete		\$10,000.00	\$0.00	\$1,000.00	\$1,000.00	10.00%	\$9,000.00
002	01-005-005 00 00	005 00 00 Metals		\$5,000.00	\$0.00	\$0.00	\$0.00	0.00%	\$5,000.00
				\$15,000.00	\$0.00	\$0.00	\$0.00		\$15,000.00

Payments Applied: \$0.00
Open Balance: \$0.00
Bal. To Finish (incl. Retainage): \$15,000.00

Prior Invoices	Current Invoice	Total Invoiced	% Complete	Balance

6/20/2016 Page Size 60

Progress Invoices

Note: Next steps will typically only be entered for Pay Apps

- Two ways to look up Subcontractor
 - Magnifying glass next to the “Subcontractor” field to bring up list and search the company for that line item

The screenshot shows a software interface for managing invoices. On the left, a blue arrow points to the 'Details tab'. The main window displays invoice information such as Revision (0), Date (May-23-2016), and Category (CA (Computer Assisted I...)). Below this is a table with columns for Line #, Cost Code, Description, and SubContractor. Two rows are visible: Line 001 for Concrete and Line 002 for Metals. A magnifying glass icon next to the SubContractor field for Line 001 is circled in red. To the right, a browser window titled 'Select Companies/Contacts - Google Chrome' is open, displaying a search results table with columns for Company, Type, Reference, and Project. The table lists various companies like '1 800 GOT JUNK', '110 TECHNOLOGY LLC', and '1141 GROUP LLC'.

Company	Type	Reference	Project
1 800 GOT JUNK	MAJ		
110 TECHNOLOGY LLC	WBE	Buyer Code: D; Minority Code: 1	
1141 GROUP LLC	MAJ	Buyer Code: D; Minority Code: 0	
12TWENTY INC	MAJ	Buyer Code: D; Minority Code:	
185 RED INC	MAJ	Buyer Code: D; Minority Code: 0	
1st Choice Courier & Distribution			
24-7 STL LLC DBA FRUEH	MAJ	Buyer Code: 8; Minority Code:	
360 TECHNOLOGIES	MAJ	Buyer Code: D; Minority Code:	
3D SYSTEMS INC DBA QUICKPARTS	MAJ	Buyer Code: D; Minority Code:	
3M COMPANY DBA 3M HEALTH INFC	MAJ	Buyer Code: D; Minority Code:	

Progress Invoices

Note: Next steps will typically only be entered for Pay Apps

- Direct Pay - If the Sub Contractor selected is MBE/WBE and entitled to Direct Pay, check the “Direct Pay?” checkbox

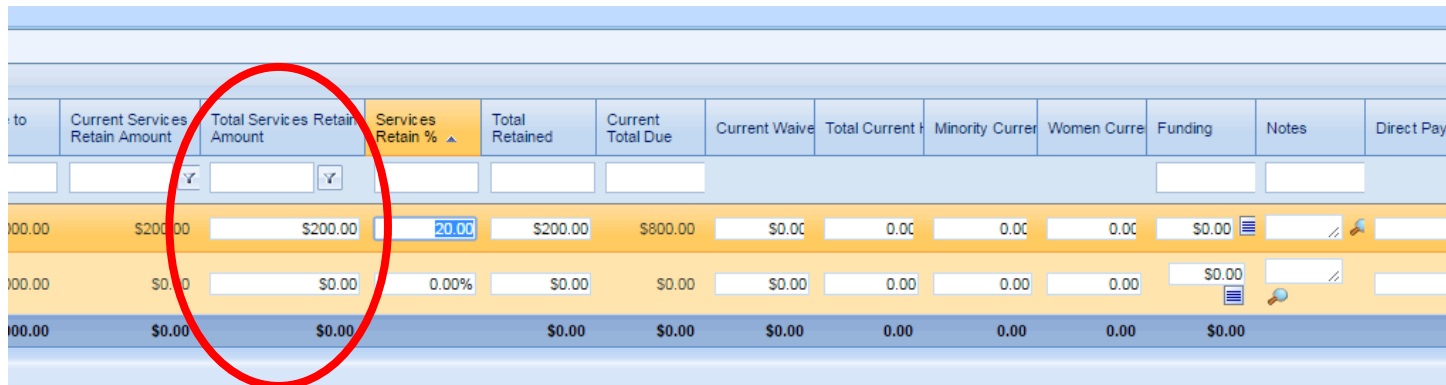
Details tab

Line #	Cost Code	Description	SubContractor	Direct Pay?	Scheduled Value	CCO #	Prior Invoices	Current Invoice	Total Invoiced	% Complete
001	01-003-003 00 00	003 00 00 Concrete	AHRENS CONTI	<input checked="" type="checkbox"/>	\$10,000.00		\$0.00	\$1,000.00	\$1,000.00	10.00%
002	01-005-005 00 00	005 00 00 Metals	Select Company	<input type="checkbox"/>	\$5,000.00		\$0.00	\$0.00	\$0.00	0.00%
					\$15,000.00		\$0.00	\$0.00	\$0.00	

Progress Invoices

Note: Next steps will typically only be entered for Pay Apps

- Total Services Retained Amount - Enter the Retainage value from the Pay App in this field per line item
 - Note the “Services Retain %” and “Total Retained” field will auto-calculate based upon the value you have entered in “Total Services Retained” field



to	Current Services Retain Amount	Total Services Retain Amount	Services Retain %	Total Retained	Current Total Due	Current Waive	Total Current	Minority Currer	Women Curre	Funding	Notes	Direct Pay
	\$200.00	\$200.00	20.00%	\$200.00	\$800.00	\$0.00	0.00	0.00	0.00	\$0.00		
	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00		
	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00		

Progress Invoices

Note: Next steps will typically only be entered for Pay Apps

- Current Waiver Amount - Enter the lien waiver value for the appropriate contractor/ subcontractor. Enter the general contractor’s lien waiver to one line only.
- Total Current Hours (%) - This is data used for the SDI Utilization Report – should be entered for each line item
- Minority Current Hours (%) - This is data used for the SDI Utilization Report – should be entered for each line item
- Women Current Hours (%) - This is data used for the SDI Utilization Report – should be entered for each line item

Total Services Retain Amount	Services Retain %	Total Retained	Current Total Due	Current Waive	Total Current H	Minority Curre	Women Curre	Funding	Notes	Direct Pay Payment Ex	Direct Pay Remit Addr
\$200.00	20.00%	\$200.00	\$800.00	\$0.00	20.00	5.00	5.00	\$0.00		1234567	
\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00			0
\$0.00		\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00			0.00

Progress Invoices

Note: Next steps will typically only be entered for Pay Apps

- Funding - Field utilized by WUSM only. This field is utilized when we need to track spending by funding source on a particular project
- Direct Pay Payment Explanation - Enter the MBE/WBE invoice number (where applicable)
- Direct Pay Remit Address - This is utilized if the remit address for the sub is anything other than the primary vendor address on file. This field will only be updated by Property Accounting.

Total Services Retain Amount	Services Retain % ▲	Total Retained	Current Total Due	Current Waive	Total Current	Minority Current	Women Current	Funding	Notes	Direct Pay Payment Ex	Direct Pay Remit Address
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
\$200.00	20.00%	\$200.00	\$800.00	\$0.00	20.00	5.00	5.00	\$0.00	<input type="text"/>	1234567	<input type="text"/>
\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00	<input type="text"/>	<input type="text"/>	<input type="text"/>
\$0.00		\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00			0.00

Progress Invoices

Property Accounting – Review and change remittance address (if necessary)

- The remittance address for progress invoices is set to default to Addr #1 in the AIS vendor file

Vendor Lookup [Vendor Lookup Help](#)

Vendor Name: (Begins With) SEARS
 SSN/Federal Id: (=)
 Employee ID: (=)
 Student ID: (=)
 Vendor ID: (=)
 *Active Code: (=) Active
 Address Type: (=) Order and Payment Vendors

Search Clear Cancel

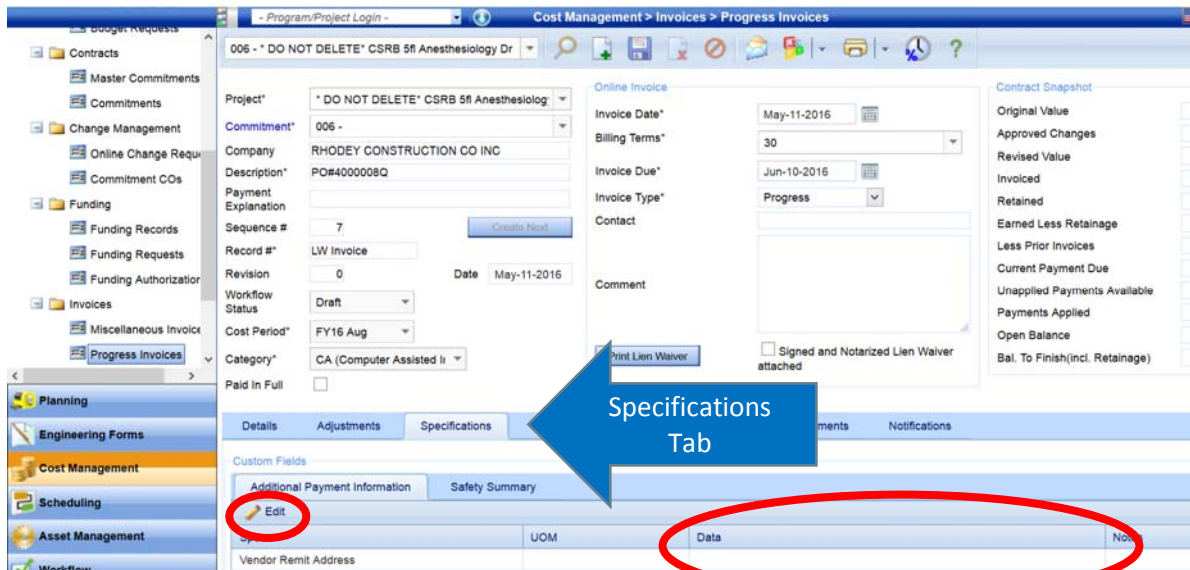
Find View All First 1-8 of 8 Last	Vendor Name	Address Line 1	Address Line 2	Address Line 3	Vendor Type	City, State/Country, Zip	Vendor ID	Addr #	Federal ID	BAA
	AL SEARS	-	518 PARKWOODS AVE	-	O	SAINT LOUIS, MO, 631224605	402078	0	-	-
	EMMA K SEARSON	-	CAMPUS BOX 5743	-	P	WASHINGTON UNIV, MO, 63105	357991	2	-	-
	RENEE LOUISE SEARS	-	333 A NORTH BOYLE AVE	-	P	ST LOUIS, MO, 63108	366362	1	-	-
	SEARS COMMERCIAL ONE	ACCT 29 074760 000	3 MID RIVERS MALL DR.	-	O	ST PETERS, MO, 63376	569273	0	****0680	-
	SEARS COMMERCIAL ONE	DEPT 53 - 0000163465	P O BOX 78042	-	P	PHOENIX, AZ, 850628042	569273	1	****0680	-
	SEARS COMMERCIAL ONE	DEPT 530000163465	P O BOX 689134	-	P	DES MOINES, IA, 503689134	569273	3	****0680	-
	SEARS PARTS AND REPAIR CENTER	-	639 B GRAVOIS BLUFFS BLVD	-	O	FENTON, MO, 63026	971647	0	****0680	-
	STEPHEN MICHAEL SEARS	-	505 S GROVE ST	-	P	URBANA, IL, 61801	387095	1	-	-



Progress Invoices

Property Accounting – Review and change remittance address (if necessary)

- Change remittance address if invoice address does not match Addr #1 in vendor file
 - Navigate to Specifications > Additional Payment Information
 - Select line to edit, and select “Edit;” in the “Data” field, insert the number of the remittance address that matches the address on the invoice



Progress Invoices

Property Accounting – Review and change remittance address (if necessary)

- Select “Update Records” to Save

The screenshot displays the 'Progress Invoices' interface. The main form contains the following fields:

- Project*: * DO NOT DELETE* CSRB 5fl Anesthesiology Dr
- Commitment*: 006 -
- Company: RHODEY CONSTRUCTION CO INC
- Description*: PO#4000008Q
- Payment Explanation:
- Sequence #: 7
- Record #: LW Invoice
- Revision: 0
- Date: May-11-2016
- Workflow Status: Draft
- Cost Period*: FY16 Aug
- Category*: CA (Computer Assisted I
- Paid In Full:

Navigation tabs include: Details, Adjustments, Specifications (highlighted with a blue arrow), Attachments, and Notifications.

At the bottom, the 'Custom Fields' section contains a table with columns 'UOM' and 'Data'. The 'Update Records' button is circled in red.

Progress Invoices

- When complete, update records and save

PMWeb - Program/Project Login - Cost Management - Invoices > Progress Invoices

002 - Moyer Cafe - ALBERICI CONSTRUCTORS INC -

Project*: Moyer Cafe
Commitment*: 002 -
Company: ALBERICI CONSTRUCTORS INC
Description*: PO#
Payment Explanation: test
Sequence #: 1
Record #: 250
Revision: 0 Date: May-23-2016
Workflow Status: Draft
Cost Period*: FY16 Apr
Category*: CA (Computer Assisted In...
Paid In Full:

Invoice Date*: May-01-2016
Billing Terms*: 30
Invoice Due*: May-31-2016
Invoice Type*: Progress
Contact:
Comment:
 Signed and Notarized Lien Waiver attached

Contract Snapshot

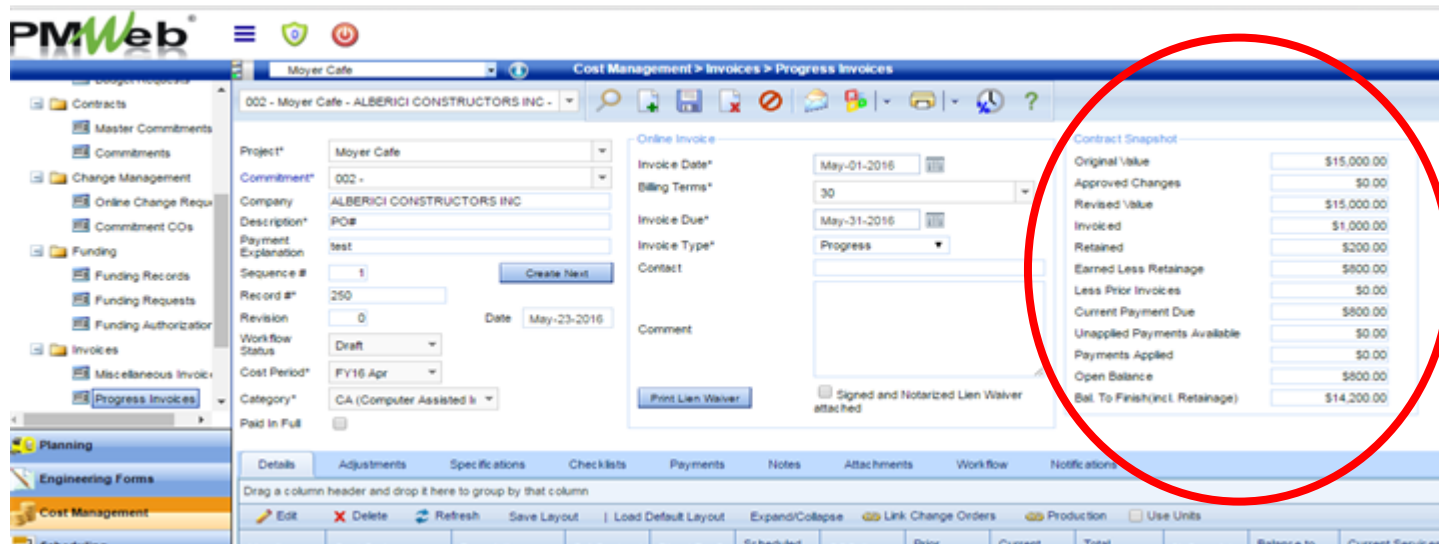
Original Value	\$15,000.00
Approved Changes	\$0.00
Revised Value	\$15,000.00
Invoiced	\$0.00
Retained	\$0.00
Earned Less Retainage	\$0.00
Less Prior Invoices	\$0.00
Current Payment Due	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00
Bal. To Finish(incl. Retainage)	\$15,000.00

Update Records

Line #	Cost Code	Description	SubContractor	Direct Pay?	Scheduled Value	CCO #	Prior Invoices	Current Invoice	Total Invoiced	% Complete
001	01-003-003 00 00	003 00 00 Concrete	AHRENS CONTI	<input checked="" type="checkbox"/>	\$10,000.00		\$0.00	\$1,000.00	\$0.00	10.00%
002	01-005-005 00 00	005 00 00 Metals	Select Company	<input type="checkbox"/>	\$5,000.00		\$0.00	\$0.00	\$0.00	0.00%
							\$15,000.00	\$0.00	\$0.00	\$0.00

Progress Invoices

- All values and associated calculations saved to the invoice can be viewed in the “Contract Snapshot” box in the header of the screen:



Progress Invoices

- A detailed field mapping of the Payment Application and the PMWeb Progress Invoice is available in the training manual

The diagram illustrates the process of generating a Progress Invoice. It starts with a 'CONTRACTOR'S APPLICATION FOR PAYMENT' and a 'CONTINUATION SHEET' (a table with columns for item description, quantity, unit, and price). These documents are processed into a 'PMWeb Progress Invoice' (Screenshot 1) and a detailed 'Invoice' table (Screenshot 2).

PMWeb Progress Invoice (Screenshot 1):

- Project: 'DO NOT DELETE' Green Hall 2nd Fl Build-Out
- Company: ALBERICI CONSTRUCTORS INC
- Invoice Date: Jun-30-2015
- Invoice Due: Jul-10-2015
- Original Value: \$1,045,600.00
- Approved Changes: \$0.00
- Revised Value: \$1,045,600.00
- Retained: \$112,975.16
- Current Payment Due: \$62,760.63

Invoice Table (Screenshot 2):

Item	Description	Quantity	Unit	Price	Total	Retained	Current Payment Due	Unapplied Payments Available	Open Balance	Balance to Finish (incl. Retainage)
1	ORIGINAL CONTRACT SUM				\$1,045,600.00					
2	Approved Changes				\$0.00					
3	Contract Value to Date				\$1,045,600.00					
4	Retained				\$112,975.16					
5	Current Payment Due				\$62,760.63					
6	Unapplied Payments Available				\$0.00					
7	Open Balance				\$62,760.63					
8	Balance to Finish (incl. Retainage)				\$904,703.55					

Legend:

1. ORIGINAL CONTRACT SUM = Original Value
2. Approved Changes = Approved Changes
3. CONTRACT VALUE TO DATE = Revised Value
4. RETAINED VALUE TO DATE OR PAYMENT = Less Prior Invoices
5. RETAINAGE (Column 4) = Total Retained Amount (Input Item) = Total Retained and not subcontracted
6. Balance to Finish (incl. Retainage) = Prior Invoices
7. Work Completed This Period = Current Invoice
8. Total Contract and Paid to Date = Total Invoiced
9. CURRENT PAYMENT DUE = Current Total Due

Submit record into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot displays a software interface with a left-hand navigation menu and a main content area. The navigation menu includes items like 'Planning', 'Engineering Forms', 'Cost Management', 'Scheduling', 'Asset Management', 'Workflow', 'Portfolio', and 'Toolbox'. The 'Workflow' item is highlighted. The main content area shows a form with fields for 'Description' (This is a test), 'Revision' (0), 'Date' (May-24-2016), 'Workflow Status' (Draft), and 'Category' (IF (Free Balance)). Below these fields are tabs for 'Details', 'Adjustments', 'Specifications', 'Workflow', and 'Notifications'. The 'Workflow' tab is selected, and a large blue arrow points to it with the text 'Workflow tab'. In the 'Workflow Actions' section, there is a list of actions: 'Approve', 'Return', 'DO NOT USE', 'Withdraw (ends workflow)', and 'Delegate'. The 'Submit' button is circled in red.

Submit Record into Workflow

- Select Save
 - You will receive notification re: the status of the workflow

The screenshot displays a software interface for submitting a record into a workflow. On the left, a sidebar menu lists various management categories: Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox. The 'Workflow' category is selected. The main area shows an 'Email Preview' for a 'PMWeb Approval Request: Miscellaneous Invoices 12345 - M'. The email body contains a notification message: 'A document has been Submitted for approval by Maria Moyer.' Below the email preview, there is a 'Business Process' table with columns for #, Type, All Must Approve, Due Date, Role, User, Delegate, Instructions, and RAM. The table shows three rows of data, with the first row being the submitter and the subsequent two rows representing approvers. A 'Save' button is highlighted with a red circle in the 'Actions' panel.

#	Type	All Must Approve	Due Date	Role	User	Delegate	Instructions	RAM
	✓	<input type="checkbox"/>		-- Submitter --				
1	✓	<input type="checkbox"/>		Project Manager 1	Maria Moyer			
2	✓	<input type="checkbox"/>		Super User	Maria Moyer			
3	✓	<input type="checkbox"/>		Plant Accounting	Maria Moyer			

Subsequent Progress Invoices

- For subsequent invoices on the same commitment, you can follow the same steps as noted or navigate to the previous invoice and click the “Create Next” button on the header

The screenshot displays the PMWeb software interface for managing progress invoices. The main window is titled '002 - Moyer Cafe - ALBERICI CONSTRUCTORS INC'. The 'Create Next' button is highlighted with a red circle. The interface includes a left-hand navigation menu with categories like Contracts, Funding, Invoices, and Planning. The main area contains form fields for Project, Commitment, Company, Description, Payment Explanation, Sequence #, Record #, Revision, Workflow Status, Cost Period, and Category. A 'Contract Snapshot' table is visible on the right, showing financial details such as Original Value, Approved Changes, Revised Value, Invoiced, Retained, Earned Less Retainage, Less Prior Invoices, Current Payment Due, Unapplied Payments Available, Payments Applied, Open Balance, and Bal. To Finish (incl. Retainage).

Line #	Cost Code	Description	SubContractor	Direct Pay?	Scheduled Value	CCO #	Prior Invoices	Current Invoice	Total Invoiced	% Complete	Balance to Invoice	Current Service Retain Amount
002	01-005-005 00 00	005 00 00 Metals		<input type="checkbox"/>	\$5,000.00		\$0.00	\$0.00	\$0.00	0.00%	\$5,000.00	\$0.00

Subsequent Progress Invoices

- Note fields for editing in new progress invoice

The screenshot shows the PMWeb interface for creating a progress invoice. The main form is titled "002 - Moyer Cafe - ALBERICI CONSTRUCTORS INC." and includes the following fields:

- Project*: Moyer Cafe
- Commitment*: 002 -
- Company: ALBERICI CONSTRUCTORS INC
- Description*: PO#
- Payment Expense: [Blank]
- Sequence #: 2
- Revision: 0
- Workflow Status: Draft
- Date: May-24-2016
- Cost Period*: -- Select --
- Category*: CA (Computer Assisted I)
- Paid In Full:

The "Contract Snapshot" table on the right shows the following values:

Original Value	\$15,000.00
Approved Changes	\$0.00
Revised Value	\$15,000.00
Invoiced	\$1,000.00
Retained	\$200.00
Earned Less Retainage	\$800.00
Less Prior Invoices	\$800.00
Current Payment Due	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00
Bal. To Finish (incl. Retainage)	\$14,200.00

The table below the form shows the invoice details:

Line #	Cost Code	Description	SubContractor	Direct Pay?	Scheduled Value	CCO #	Prior Invoices	Current Invoice	Total Invoiced	% Complete	Balance to Invoice	Current Service Retain Amount
002	01-005-005 00 00	005 00 00 Metals		<input type="checkbox"/>	\$5,000.00		\$0.00	\$0.00	\$0.00	0.00%	\$5,000.00	\$0.00
001	01-003-003 00 00	003 00 00 Concret	AHRENS COI	<input type="checkbox"/>	\$10,000.00		\$1,000.00	\$0.00	\$1,000.00	10.00%	\$9,000.00	\$0.00
					\$15,000.00		\$1,000.00	\$0.00	\$1,000.00		\$14,000.00	\$0.00

Column Cleanup for Progress

Invoices

- The details screen includes several columns that are not needed, in the wrong order, or are only needed when certain pieces are present on a project (i.e. stored materials).
- Here are all the columns that should be visible and in the order of which they should be displayed:
 1. Line #
 2. Cost Code
 3. Description
 4. SubContractor (input field)
 5. Direct Pay? (input field)
 6. Scheduled Value
 7. CCO#
 8. Prior Invoices
 9. Current Invoice (input field)
 10. Total Invoiced
 11. % Complete
 12. Balance to Invoice
 13. Prior Services Retain Amount
 14. Current Services Retain Amount
 15. Total Services Retain Amount (input field)
 16. Services Retain %
 17. Total Retained (this column may be able to be turned “off.” Since it is only different from the total services retain amount when stored materials are added)
 18. Current Total Due
 19. Current Waiver Amount (input field)
 20. Total Current Hours (input field)
 21. Minority Current Hours (input field)
 22. Women Current Hours (input field)
 23. Direct Pay Payment Explanation (input field)
 24. Direct Pay Remit Address (input field)
 25. Funding (Med School only) (input field)
 26. Notes (input field)

Column Cleanup for Progress Invoices

Invoices

- The details screen includes several columns that are not needed, in the wrong order, or are only needed when certain pieces are present on a project (i.e. stored materials).
- Here are all the columns that should be visible and in the order of which they should be displayed:

The screenshot shows the PMWeb interface for an invoice. The top section displays invoice details for '02020 - Carleton University Center Third Floor (VULR)'. It includes fields for Project, Company, Invoice Date, Billing Terms, Invoice Due, and Invoice Type. A summary table on the right shows values for Original Value, Approved Charges, Revised Value, Invoiced, Retained, Service Less Retainage, Less Prior Invoices, Current Payment Due, Unapplied Payments Available, Payments Applied, Open Balance, and Bal. To Financial Retainage.

The bottom section is a table with the following columns: Line#, Class Code, Description, SubContract, Direct Pay?, Scheduled Date, CDD#, Prior Invoices, Current Invoice, Total Invoiced, % Complete, Balance in Invoice, Prior Services Retain Amount, Current Services Retain Amount, Total Services Retain Amount, Services Retain %, Total Retained, Current Total Due, Current Invoice Amount, Total Current Hours, Monthly Current Hours, Women Current Hours, Direct Pay Payment Suspension, Direct Pay Remit Address, and Notes.

Line#	Class Code	Description	SubContract	Direct Pay?	Scheduled Date	CDD#	Prior Invoices	Current Invoice	Total Invoiced	% Complete	Balance in Invoice	Prior Services Retain Amount	Current Services Retain Amount	Total Services Retain Amount	Services Retain %	Total Retained	Current Total Due	Current Invoice Amount	Total Current Hours	Monthly Current Hours	Women Current Hours	Direct Pay Payment Suspension	Direct Pay Remit Address	Notes	
010	01-020-0201 00	001 00 00 General Requirement	DOH C MUSICK CONIST			0204 00	A001	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00			
010	01-020-0208 00	008 00 00 Visesa, Plastics and	C & R INDUSTRIAL SUP			\$-21,148.00	A001	\$0.00	\$0.00	0.00%	\$-21,148.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00				
017	01-020-0208 00	008 00 00 Openings	HIGHWAY MATERIALS			\$-13,800.00	A001	\$0.00	\$0.00	0.00%	\$-13,800.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00				
019	01-020-0208 00	009 00 00 Finishes	ABC Class			\$-47,487.00	A001	\$0.00	\$0.00	0.00%	\$-47,487.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00				
024	01-010-0110 00	010 00 00 Specialties	GOLTERMAN AND S&B			\$-7,120.00	A001	\$0.00	\$0.00	0.00%	\$-7,120.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00				
028	01-020-0208 00	028 00 00 Plumbing	C & R MECHANICAL CI			\$14,870.00	A001	\$0.00	\$0.00	0.00%	\$14,870.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00				
028	01-020-0208 00	028 00 00 Integrated Automation	DOH C MUSICK CONIST			\$-2,481.00	A001	\$0.00	\$0.00	0.00%	\$-2,481.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00				
028	01-020-0208 00	028 00 00 Electrical	SCHAEFER ELECTRIC			\$-4,834.00	A001	\$0.00	\$0.00	0.00%	\$-4,834.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00				
010	01-020-0201 00	001 00 00 General Requirement	DOH C MUSICK CONIST			\$-13,284.00	A001	\$384.00	\$0.00	0.00%	\$-13,284.00	\$384.00	\$0.00	\$384.00	0.00%	\$0.00	\$384.00	\$0.00	\$0.00	0.00	0.00				
010	01-020-0208 00	008 00 00 Openings	SUNDAT SOLAR			\$712.00	A001	\$712.00	\$0.00	100.00%	\$0.00	\$712.00	\$-712.00	\$0.00	0.00%	\$0.00	\$712.00	\$0.00	\$0.00	0.00	0.00				
020	01-020-0208 00	020 00 00 Finishes	HIGHMAN AND ASSC			\$2,170.00	A001	\$2,170.00	\$0.00	100.00%	\$0.00	\$2,170.00	\$-2,170.00	\$0.00	0.00%	\$0.00	\$2,170.00	\$0.00	\$0.00	0.00	0.00				
020	01-020-0208 00	020 00 00 Billing Conditions	DOH C MUSICK CONIST			\$3,716.00	A001	\$3,716.00	\$0.00	100.00%	\$0.00	\$3,716.00	\$-3,716.00	\$0.00	0.00%	\$0.00	\$3,716.00	\$0.00	\$0.00	0.00	0.00				
010	01-020-0208 00	009 00 00 Finishes	ABC Class			\$79,987.00	A001	\$5,090.00	\$0.00	6.22%	\$74,897.00	\$500.00	\$-500.00	\$0.00	0.00%	\$0.00	\$500.00	\$0.00	\$0.00	0.00	0.00				
014	01-020-0201 00	001 00 00 General Requirement	DOH C MUSICK CONIST			\$9,373.00	A001	\$9,373.00	\$0.00	100.00%	\$0.00	\$9,373.00	\$-9,373.00	\$0.00	0.00%	\$0.00	\$9,373.00	\$0.00	\$0.00	0.00	0.00				
020	01-010-0110 00	010 00 00 Specialties	GOLTERMAN AND S&B			\$5,841.00	A001	\$8,140.00	\$0.00	138.19%	\$2,299.00	\$8,140.00	\$-6,841.00	\$0.00	0.00%	\$0.00	\$8,140.00	\$0.00	\$0.00	0.00	0.00				
020	01-020-0201 00	021 00 00 Fire Suppression	HIGHBERING SAHVIC			\$6,591.00	A001	\$7,078.00	\$0.00	107.11%	\$-487.00	\$7,078.00	\$-7,078.00	\$0.00	0.00%	\$0.00	\$7,078.00	\$0.00	\$0.00	0.00	0.00				
022	01-020-0208 00	022 00 00 Finishes	BADAN PAINTING CO			\$6,738.00	A001	\$7,817.00	\$903.00	116.02%	\$-1,079.00	\$7,817.00	\$-6,738.00	\$0.00	0.00%	\$0.00	\$1,079.00	\$0.00	\$0.00	0.00	0.00				
028	01-020-0208 00	028 00 00 Electrical	SIMPSON GARNHALL CO			\$5,834.00	A001	\$5,833.00	\$0.00	99.99%	\$-1.00	\$5,833.00	\$-5,833.00	\$0.00	0.00%	\$0.00	\$5,833.00	\$0.00	\$0.00	0.00	0.00				
020	01-020-0208 00	020 00 00 Finishes	Flaming Systems			\$12,234.00	A001	\$11,980.00	\$0.00	97.93%	\$-254.00	\$1,198.00	\$-1,198.00	\$0.00	0.00%	\$0.00	\$1,198.00	\$0.00	\$0.00	0.00	0.00				
020	01-020-0208 00	020 00 00 Integrated Automation	DOH C MUSICK CONIST			\$14,870.00	A001	\$11,784.00	\$0.00	79.30%	\$-3,086.00	\$3,178.00	\$-3,178.00	\$0.00	0.00%	\$0.00	\$1,178.40	\$0.00	\$0.00	0.00	0.00				

Column Cleanup for Progress Invoices

Invoices

- To hide columns, Right Click on a column, go to the “Columns” value and view all of the columns that are present. Uncheck any column that is not on the list; Save Layout

Project* Moyer Cafe
Commitment* 002 -
Company ALBERICI CONSTRUCTORS INC
Description*
Payment PO#
Explanation test
Sequence # 1
Record #* 250
Revision 0 Date May-23-2016
Workflow Status Draft
Cost Period* FY16 Apr
Category* CA (Computer Assisted In
Paid In Full

Online Invoice
Invoice Date* May-01-2016
Billing Terms* 30
Invoice Due* May-31-2016
Invoice Type* Progress
Contact
Comment
Signed and Notarized Lien Waiver attached

Contract Snapshot

Contract Snapshot	
Original Value	\$15,000.00
Approved Changes	\$0.00
Revised Value	\$15,000.00
Invoiced	\$0.00
Retained	\$0.00
Earned Less Retainage	\$0.00
Less Prior Invoices	\$0.00
Current Payment Due	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00
Bal. To Finish (incl. Retainage)	\$15,000.00

Details Adjustments Specifications Checklists Payments Notes Attachments Notifications

Drag a column header and drop it here to group by and sort

Edit Delete Refresh Save Layout Load Default Layout Expand/Collapse Link Change Orders Production Use Units

Line #	Cost Code	Description	SubContract	Direct Pay?	Scheduled Value	CCO #	Prior Invoices	Current Invoice	Current Stored Material	Total Stored Material	Total This Invoice	Total Invoice
		0.00 Concrete			\$10,000.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
					\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
					\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Columns

- Line #
- Cost Code
- Description

Column Cleanup for Progress Invoices

- To reorder columns, hover over the column that needs to be moved until you see a four way arrow icon and a small popup box that says, "Drag to group or reorder."

Project* Moyer Cafe
Commitment* 002 -
Company ALBERICI CONSTRUCTORS INC
Description* PC#
Payment Explanation test
Sequence # 1
Record #* 250
Revision 0 Date May-23-2016
Workflow Status Draft
Cost Period* FY16 Apr
Category* CA (Computer Assisted Ir
Paid In Full

Online Invoice
Invoice Date* May-01-2016
Billing Terms* 30
Invoice Due* May-31-2016
Invoice Type* Progress
Contact
Comment
Print Lien Waiver
 Signed and Notarized Lien Waiver attached

Contract Snapshot

Original Value	\$15,000.00
Approved Changes	\$0.00
Revised Value	\$15,000.00
Invoiced	\$0.00
Retained	\$0.00
Earned Less Retainage	\$0.00
Less Prior Invoices	\$0.00
Current Payment Due	\$0.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$0.00
Bal. To Finish(Incl. Retainage)	\$15,000.00

Details Adjustments Specifications Checklists Payments Notes Attachments Notifications

Drag a column header and drop it here to group by that column

Edit Delete Refresh Save Layout Load Default Layout Expand/Collapse Link Change Orders Production Use Units

Line #	Cost Code	Description	SubContractor	Direct Pay?	Scheduled Value	CCO #	Prior Invoices	Current Invoice	Total Invoiced	% Complete	Balance to Invoice	Current Retain A
001	01-003-003 00 00	003 00 00 Concrete		<input type="checkbox"/>	\$10,000.00		\$0.00	\$0.00	\$0.00	0.00%	\$10,000.00	
002	01-005-005 00 00	005 00 00 Metals		<input type="checkbox"/>	\$5,000.00		\$0.00	\$0.00	\$0.00	0.00%	\$5,000.00	
					\$15,000.00		\$0.00	\$0.00	\$0.00		\$15,000.00	

Page Size 60

Column Cleanup for Progress Invoices

- Click and drag the column to the area where you want to drop that column. Two yellow arrows will display to direct you to where to drop the column
- Save Layout

The screenshot shows a software interface with a table of financial data. The table has columns for various financial metrics. Two red circles are drawn on the interface: one around the 'Save Layout' button in the top toolbar, and another around the 'Total Retained' column header in the table. The table data is as follows:

Current Services Retain Amount	Total Services Retain Amount	Services Retain %	Total Retained	Prior Services Retain Amount	Waive	Total Current	Minority Curre	Women Curre	Funding	Notes	Prior Services Retain Amount	Direct Pay Payment E	Direct Pay Remit Add
\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00		\$0.00		0
\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00		\$0.00		0
\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	0.00	0.00	0.00	\$0.00		\$0.00		0.00

Database: WUSTL User: Maria Moyer

The logo for PMWeb, featuring the letters 'PM' in black, a green stylized 'W' that overlaps 'PM' and 'eb', and 'eb' in black. A registered trademark symbol (®) is located to the upper right of the 'b'.

PMWeb® Training

A/P Payments

A/P Payments

- Two ways to navigate to A/P Payments module
 - Cost Management > A/P Payments sub-category

The screenshot displays the PMWeb application interface. The top navigation bar shows the path: Cost Management > Payments > A/P Payments. The main content area displays a table of A/P Payments for the program ATEST1-DAN and project Danforth University Center Third Floor KWUR Relocation. The table includes columns for Project #, Payment Date, Record #, Description, Payment Amount, Category, Invoice #, Reference, Payment Method, and Payment #.

Project #	Payment Date	Record #	Description	Payment Amount	Category	Invoice #	Reference	Payment Met	Payment #
2013907	May-03-2016	ID2176309-100001	RENOVATIONS	\$630.00	ID	2176309	52-000997-5500-85384-XX		
2013907	May-03-2016	ID2176310-100001	RENOVATIONS	\$307.32	ID	2176310	52-000997-7301-85384-XX		
2013907	Apr-27-2016	IN12916294-10000	BROWN SMITH WALLACE LLC	\$2,295.00	CA	130655R	52-000997-5500-85384-XX	CK	210729
2013907	Apr-27-2016	IN12916295-10000	BROWN SMITH WALLACE LLC	\$324.00	CA	130739R	52-000997-5500-85384-XX	CK	210729
2013907	May-03-2016	JR1296724-1	CAPITAL PROJECTS & RECORD	\$969.00	JR		52-000997-7307-85384-XX		
2013907	May-03-2016	JR1296727-1	CAPITAL PROJECTS & RECORD	\$2,072.00	JR		52-000997-7307-85384-XX		
2013907	May-26-2016	IN12916471-10000		\$500.00	CA	130739VB	52-000997-7305-85384-XX	CK	210920
2013907	Jun-01-2016	IN12916532-10000	BSI CONSTRUCTORS INC	\$5,850.00	CA	130001APP1X	52-000997-85384-XX	ACH	024992
2013907	Jun-01-2016	IN12916533-10000	WATERHOUT CONSTRUCTION I	\$450.00	CA	130001APP1AX	52-000997-85384-XX	CK	210924
2013907	Jun-01-2016	IN12916534-10000	TD4 LLC	\$2,025.00	CA	130001APP1BX	52-000997-85384-XX	CK	210923

A/P Payments

Cost Management

A/P Payments

- Two ways to navigate to A/P Payments module
 - Project Center > Select A/P Payments hyperlink

The screenshot displays the PMWeb interface for the 'A/P Payments' module. The breadcrumb trail is 'Cost Management > Payments > A/P Payments'. The 'Project Center' tab is active, showing details for 'Danforth University Center Third Floor KWUR Relocal'. The 'Navigator' on the right lists various project management functions, with 'A/P Payments' highlighted by a red circle. Below the main form, there are sections for 'Custom Fields' and a table of project metrics.

Record Type	Pending	Approved
Project Codes	0	0
Schedules	0	0

Field	Value
Project Date Tracking	0
Project Status Updates	10
Project Ratings	0
LEED Information	0
Debt Funded	0
Admin Use Only	0

A/P Payments

- Payments that have been made in AIS are brought into PMWeb via an integration program.
- Payments that are associated with an progress or miscellaneous invoice in PMWeb are tied to the invoice record

A/P Payments

- To review payment information, select the payment from the A/P Payment board

PMWeb

Cost Management > Payments > A/P Payments

Program: *All* Projects: Danforth University Center Third Floor

Project #	Payment Date	Record #	Description	Payment Amount	Category	Invoice #	Reference	Payment Met	Payment #
Program: ATEST1-DAN									
Project Name: Danforth University Center Third Floor KWUR Relocation									
2013907	May-03-2016	ID2176309-100001	RENOVATIONS	\$630.00	ID	2176309	52-000997-5500-85384-XX		
2013907	May-03-2016	ID2176310-100001	RENOVATIONS	\$307.32	ID	2176310	52-000997-7301-85384-XX		
2013907	Apr-27-2016	IN12916294-10000	BROWN SMITH WALLACE LLC	\$2,295.00	CA	130655R	52-000997-5500-85384-XX	CK	210729
2013907	Apr-27-2016	IN12916295-10000	BROWN SMITH WALLACE LLC	\$324.00	CA	130739R	52-000997-5500-85384-XX	CK	210729
2013907	May-03-2016	JR1296724-1	CAPITAL PROJECTS & RECORD	\$969.00	JR		52-000997-7307-85384-XX		
2013907	May-03-2016	JR1296727-1	CAPITAL PROJECTS & RECORD	\$2,072.00	JR		52-000997-7307-85384-XX		
2013907	May-26-2016	IN12916471-10000		\$500.00	CA	130739VB	52-000997-7305-85384-XX	CK	210920
2013907	Jun-01-2016	IN12916532-10000	BSI CONSTRUCTORS INC	\$5,850.00	CA	130001APP1X	52-000997-85384-XX	ACH	024992
2013907	Jun-01-2016	IN12916533-10000	WATERHOUT CONSTRUCTION I	\$450.00	CA	130001APP1AX	52-000997-85384-XX	CK	210924
2013907	Jun-01-2016	IN12916534-10000	TD4 LLC	\$2,025.00	CA	130001APP1BX	52-000997-85384-XX	CK	210923

A/P Payments

Cost Management

6/20/20

A/P Payments

- A/P Payments associated with an invoice
 - Linked invoice information appears in the payment screen
 - This link will take you directly to the associated invoice

The screenshot displays the PMWeb software interface for A/P Payments. The breadcrumb navigation shows 'Cost Management > Payments > A/P Payments'. The main form contains the following fields:

- Program*: ATEST1-DAN
- Project*: Danforth University Center Third Floor KWUR I
- Commitment: 009607 - this vendor s/b Brown Kortkamp Mov
- Linked A/P Invoice: Prog 130655R - PO# 4000011Q (circled in red)
- ID*: IN12916234F10000
- Description: BROWN SMITH WALLACE LLC
- Currency: Dollar (United States of America)
- Payment Batch: (empty)
- Workflow Status: Approved
- Revision: 0
- Open Balance: \$0.00
- Payment Amount: \$2,295.00
- Cost Code: Select Cost Code
- Period: (empty)
- Invoice #: 130655R
- Payment Method: CK
- Payment #: 210729
- Payment Date: Apr-27-2016
- Company: BROWN SMITH WALLACE LLC
- Type: -- Select --
- Category: CA
- Reference: 52-000997-5500-85384-XX
- Notes: (empty)
- Applied In Full:

At the bottom, there is a table with the following columns: ID, Program*, Project, A/P Contract, Linked A/P Invoice, and Applied Amount. The table is currently empty, displaying 'No records to display.' The page size is set to 20.

A/P Payments

- From the invoice screen, link to the A/P payment record
 - Payments Tab > Payment ID

The screenshot displays the PMWeb application interface. The left sidebar shows a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, and Workflow. The main content area is titled 'Cost Management > Invoices > Progress Invoices'. It shows details for a specific invoice, including Project, Commitment, Company, Description, and various dates. The 'Payments' tab is active, displaying a table of payment records. A red circle highlights the first row of the table, which contains the following data:

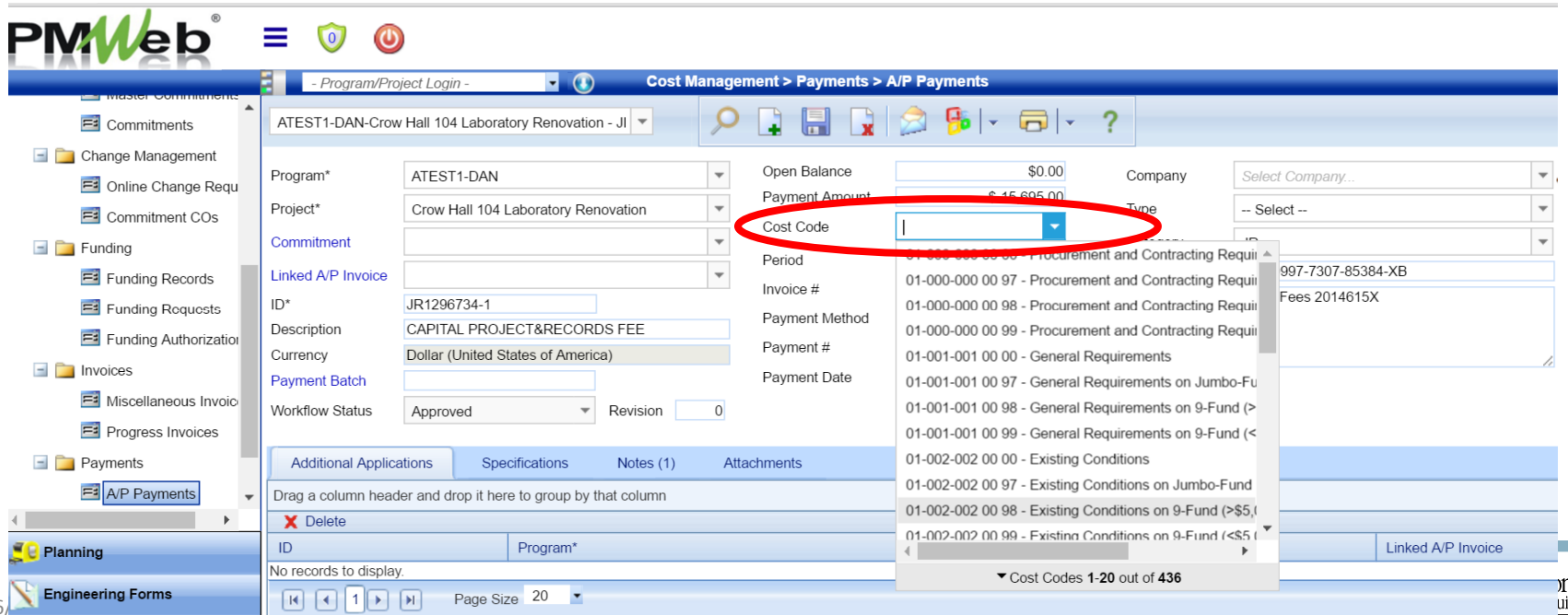
ID	Status	Company	Description	Payment Method	Payment #	Payment Date	Payment Amount	Cost Code
IN12916294-10000	Approved	BROWN SMITH WALLACE LLC	BROWN SMITH WALLACE LLC	CK	210729	Apr-27-2016	\$2,295.00	210729

A/P Payments

- Payments that are not associated with an invoice in PMWeb (journals, etc) are not tied to an invoice record and need to be manually tagged with a cost code

A/P Payments

- Tag non-invoice payments with a cost code
 - Select the cost code in the cost code field from the dropdown



The screenshot displays the PMWeb software interface for managing A/P Payments. The main window title is "Cost Management > Payments > A/P Payments". The breadcrumb navigation shows the current path: "Program/Project Login" > "A/TEST1-DAN-Crow Hall 104 Laboratory Renovation - JI".

The form contains the following fields and values:

- Program*: ATEST1-DAN
- Project*: Crow Hall 104 Laboratory Renovation
- Open Balance: \$0.00
- Payment Amount: \$15,695.00
- Company: Select Company...
- Cost Code: (highlighted with a red circle, dropdown menu is open)
- Period: 01-000-000 00 97 - Procurement and Contracting Requi
- Invoice #: 01-000-000 00 98 - Procurement and Contracting Requi
- Payment Method: 01-000-000 00 99 - Procurement and Contracting Requi
- Payment #: 01-001-001 00 00 - General Requirements
- Payment Date: 01-001-001 00 97 - General Requirements on Jumbo-Fu

The dropdown menu for the Cost Code field is open, showing a list of cost codes with their descriptions:

- 01-000-000 00 97 - Procurement and Contracting Requi
- 01-000-000 00 98 - Procurement and Contracting Requi
- 01-000-000 00 99 - Procurement and Contracting Requi
- 01-001-001 00 00 - General Requirements
- 01-001-001 00 97 - General Requirements on Jumbo-Fu
- 01-001-001 00 98 - General Requirements on 9-Fund (>
- 01-001-001 00 99 - General Requirements on 9-Fund (<
- 01-002-002 00 00 - Existing Conditions
- 01-002-002 00 97 - Existing Conditions on Jumbo-Fund
- 01-002-002 00 98 - Existing Conditions on 9-Fund (>\$5,0
- 01-002-002 00 99 - Existing Conditions on 9-Fund (<\$5,0

The interface also includes a left-hand navigation menu with options like "Commitments", "Change Management", "Funding", "Invoices", and "Payments". The bottom of the screen shows a "Planning" tab and "Engineering Forms" section.

PMWeb[®] Training

Project Closeout

Project Closeout Checklist

- Use the project closeout checklist to manage the project closeout process
- Each campus has a different closeout checklist
 - DAN Closeout Checklist
 - WUSM Closeout Checklist

DAN Project Closeout Checklist

- Navigate to Engineering Forms > DAN Closeout Checklist

The screenshot shows the PMweb application interface. The navigation menu on the left includes categories like Submittal Items, Meeting Minutes, Drawing Lists, Daily Reports, Punch Lists, Transmittals, Action Items, Correspondence, and Forms. The 'Forms' category is expanded, showing 'DAN Closeout Checklist', 'Emergency Form', and 'WUSM closeout chec'. The 'DAN Closeout Checklist' form is displayed, featuring a header with the Washington University logo and the title 'DAN Closeout Checklist'. Below the header is a 'Project Information' section with fields for Project Number, Form#, Project Name, and Planner / PM. The main content area contains a table titled 'Construction Close Out' with columns for Incomp., Comp., N/A, Date Completed, Close Out Item, and Notes. The table has two rows of data, each with a date of Jun-07-2016 and a detailed description of the closeout process.

Construction Close Out						
Incomp.	Comp.	N/A	Date Completed	Close Out Item	Notes	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Jun-07-2016	PM has completed punchlist walk through with A/E and has reviewed the punchlist for accuracy and completeness. If no A/E is contracted for CA, the PM shall document and distribute the punchlist directly to the Contractor.		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Jun-07-2016	For projects utilizing the services of an A/E, the A/E is responsible for issuing the Certificate of Substantial Completion. If no A/E is utilized, the PM is responsible for issuing the Certificate of Substantial Completion for the project. The punchlist should be attached to the certificate. The SC Certificate should be routed for signature by the		

DAN closeout checklist

Engineering Forms

6/20/2016

WUSM Project Closeout Checklist

- Navigate to Engineering Forms > WUSM Closeout Checklist

The screenshot displays the PMWeb application interface. The top navigation bar shows the breadcrumb path: Engineering Forms > Forms > WUSM closeout checklist. The left sidebar contains a tree view of application modules, with 'Engineering Forms' highlighted. A blue arrow points from the text 'WUSM closeout checklist' to the 'WUSM closeout chec' item in the sidebar. Another blue arrow points from the text 'Engineering Forms' to the 'Engineering Forms' item in the sidebar. The main content area features a form titled 'WUSM closeout checklist' with a 'Project Information' section containing fields for Project Number, Project Name (with a dropdown menu), and Planner / PM. Below this is a table with a blue header 'Construction Close Out' and four columns: Status, Date Completed, Close Out Item, and Notes. The first row of the table shows a date of 'Jun-07-2016' and a detailed description of the punchlist walk-through process.

Status	Date Completed	Close Out Item	Notes
	Jun-07-2016	PM has completed punchlist walk through with A/E and has reviewed the punchlist for accuracy and completeness. If no A/E is contracted for CA, the PM shall document and distribute the punchlist directly to the Contractor.	

6/20/2016

Project Closeout Checklist

- Select the add icon to add a new closeout checklist

The screenshot shows the PMWeb software interface. The browser address bar indicates the path: Program/Project Login > Toolbox > Forms > WUSM closeout checklist. A red circle highlights the 'add' icon (a green plus sign) in the toolbar. The main content area displays the 'WUSM closeout checklist' form, which includes a 'Project Information' section and a 'Construction Close Out' table.

Complete?	Date Completed	Close Out Item	Notes
<input type="checkbox"/>	Jun-05-2016	PM has completed punchlist walk through with A/E and has reviewed the punchlist for accuracy and completeness. If no A/E is contracted for CA, the PM shall document and distribute the punchlist directly to the Contractor.	
<input type="checkbox"/>	Jun-05-2016	For projects utilizing the services of an A/E, the A/E is responsible for issuing the Certificate of Substantial Completion. If no A/E is utilized, the PM is responsible for issuing the Certificate of Substantial Completion for the	

Project Closeout Checklist

- Select the project name from the project dropdown
- Enter Planner/Project Manager name

The screenshot shows the PMWeb software interface. The main window displays the 'WUSM closeout checklist' form. The form has a 'Project Information' section with fields for 'Project Number' and 'Project Name'. Below this is a 'Construction Closeout' section with a 'Complete?' column and a 'Notes' column. A red circle highlights the 'Planner / PM' dropdown menu, which is open and showing a list of project names. The list includes: 'ALL Testing', 'KM MUSIC AND FINE ARTS CENTER - TEST', 'Lab Renovation-CATest', 'Layout test', 'Lisa's Resolution Test', 'Melissa GMP Contract Test', 'Melissa's New Office', 'Moyer Cafe', 'MULTIPLE CUSTOMER TEST', 'My New House Jen', 'North Campus Medicine Physician Billing Office Expansion', 'Olin 28 Janice new office', 'Orr Test 2 - 04192016', 'Powers Family Wing 4th Floor CSRB-NTA (do not delete)', 'Powers TEST', and 'RJC Test Project (Based on Ridgley)'. The left sidebar shows a navigation menu with items like 'Planning', 'Engineering Forms', 'Cost Management', 'Scheduling', 'Asset Management', 'Workflow', and 'Portfolio'. The top of the browser window shows the URL '- Program/Project Login -' and the page title 'Toolbox > Forms > WUSM closeout checklist'.

Project Closeout Checklist

- Both WUSM and DAN closeout checklists have multiple sections and items:
 - Construction Closeout
 - Documentation Closeout
 - Financial Closeout
 - WUSM only – WUSM specific closeout items

Project Closeout Checklist

- The closeout checklists have been set up so that multiple roles can view and approve the checklist.
- These roles will receive workflow notifications to approve their step in the workflow.
- Each item has the choice of Complete/Incomplete/NA
- Each item has a date field to update the date completed, if applicable

DAN Project Closeout Checklist

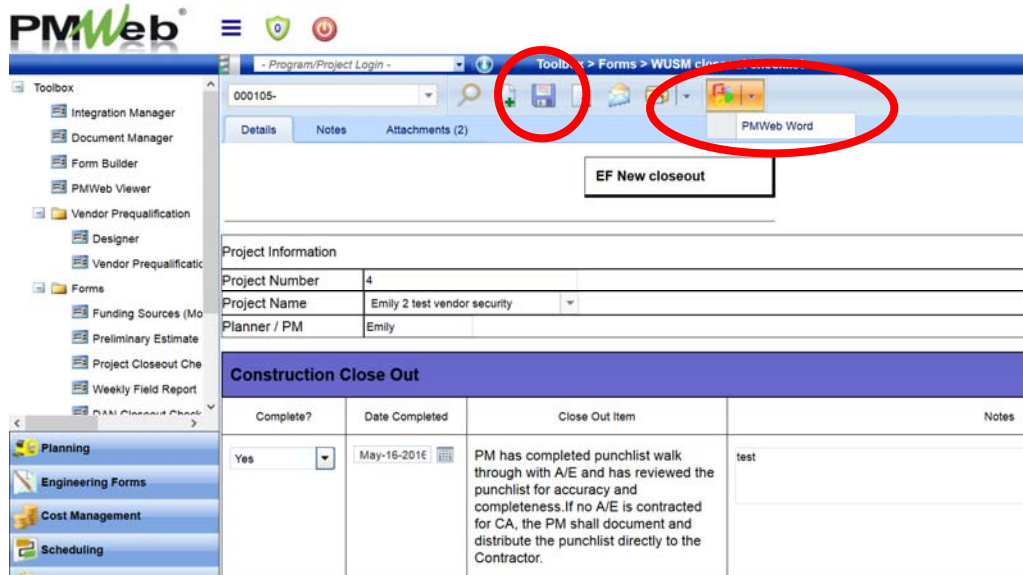
- DAN Closeout Checklist Roles and Responsibilities
- PM
 - Complete the checklist
 - Submit checklist into workflow for approval by appropriate parties.
 - Each predefined role will receive notification to log into PMWeb and approve the closeout checklist

WUSM Project Closeout Checklist

- WUSM Closeout Checklist Roles and Responsibilities
 - Records Coordinator
 - Create closeout checklist in PMWeb upon receipt of substantial completion certificate from the PM
 - Notify PM that the form has been created
 - Update status of any items they assisted with
 - PM
 - Update any remaining closeout item fields and dates for time sensitive or critical activities.
 - If PM requires a hard copy, print the checklist using PM Web Word (instructions following this slide)
 - Once complete, submit the closeout checklist into workflow.

WUSM Project Closeout Checklist

- Print WUSM Closeout Checklist
 - Save closeout checklist for current project
 - Select PMWeb word icon > PMWeb Word



The screenshot shows the PMWeb software interface. The 'Forms' menu is open, and the 'PMWeb Word' icon is circled in red. The interface displays a form for 'EF New closeout' with the following information:

Project Information

Project Number	4
Project Name	Emily 2 test vendor security
Planner / PM	Emily

Construction Close Out

Complete?	Date Completed	Close Out Item	Notes
Yes	May-16-2016	PM has completed punchlist walk through with A/E and has reviewed the punchlist for accuracy and completeness. If no A/E is contracted for CA, the PM shall document and distribute the punchlist directly to the Contractor.	test

WUSM Project Closeout Checklist

- Print WUSM Closeout Checklist
 - The report viewer window will open
 - Select application to open and save/print document

The screenshot displays the PMWeb software interface. The main window shows a form titled "WUSM Closeout Checklist" with a "Project Information" section. The "Merge To Word" button in the "Template" window is circled in red. The "Project Information" section contains the following data:

Project Information	
Project Number	170013
Project Name	EMILY Testing vendor security
Planner / PM	EMILY Testing vendor sec

Below the "Project Information" section, there is a "Construction Close Out" section.

Submit Closeout Checklist into Workflow

- Select the “Workflow” tab
- Select Submit

The screenshot displays the PMWeb application interface. The top navigation bar shows the breadcrumb path: **Toolbox > Forms > DAN Closeout Checklist**. Below this, there are tabs for **Details**, **Notes**, **Attachments**, and **Workflow**. A blue arrow points to the **Workflow** tab. In the **Workflow Actions** section, a list of actions is shown with radio buttons: **Approve**, **Return**, **DO NOT USE**, **Withdraw (ends workflow)**, **Final Approve**, and **Delegate**. The **Submit** button is circled in red. To the right, there is an **Email Preview** section with fields for **Subject** and **Email Body**, and a **Comments** section. The left sidebar contains a **Toolbox** with various tools like **Integration Manager**, **Document Manager**, **Form Builder**, and **PMWeb Viewer**. At the bottom, there are sections for **Business Process** and **Workflow Log**.

Submit Closeout Checklist into Workflow

- Select Save

- You will receive notification re: the status of the workflow

The screenshot displays the PMWeb application interface. The top navigation bar includes the PMWeb logo, a menu icon, and a status indicator. The main content area is titled 'DAN Closeout Checklist' and shows a workflow action list. The 'Save' button is highlighted with a red circle. The 'Email Preview' section shows a notification message: 'PMWeb Approval Request: DAN Closeout Checklist 1 - Moyer Cafe'. The 'Workflow Document Information' section lists: '- Document type: DAN Closeout Checklist', '- Project Name: Moyer Cafe', and '- Document Description:'. The 'Save' button is circled in red.

Project Closeout Status

- Two ways to navigate to Projects module
 - Portfolio > Project Records sub-category

The screenshot displays the PMWeb software interface. The navigation menu on the left includes categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, and Portfolio. The main form shows project details for 'South Building 4th Fl Cell Biology' with fields for Program, Project ID, Name, Location, Project Status, Project Type, Category, Workflow Status, Revision, Currency, Program WBS, Target Budget, Project Account Amount, Target Duration, Target Start, Target Finish, Percent Complete, and Scope. A table of linked assets is visible at the bottom, listing Suite, Location, Building, Floor, and Space.

Suite	Location	Building	Floor	Space
	South Medical Building	3 - South Medical Bldg	1 - 1	1007 - 1007

Project Closeout Status

- Two ways to navigate to Projects module
 - Project Center > Select Project ID hyperlink

The screenshot displays the PMWeb software interface. The main content area is titled "Project Center" and shows a form for editing project details. The "Project ID" field is circled in red, and the "Project Status" dropdown menu is also circled in red. The form includes fields for Name, Location, Category, Workflow Status, Currency, Target Budget, Target Revenue, Target Duration, Target Start/Finish, Actual Start/Finish, Percent Complete, and Scope. The right-hand sidebar contains sections for "Schedule", "Budget", and "Custom Fields", each with associated data and options. The bottom of the interface features a navigation menu with options like "Planning", "Engineering Forms", "Cost Management", "Scheduling", "Asset Management", "Workflow", and "Portfolio".

Project Closeout Status

- Note the choices for project status; update status on the project record

The screenshot displays the PMWeb interface for a project record. The left sidebar contains navigation menus for 'Calendar Setup', 'Email', 'Events', 'Triggers', 'Search', and 'Lists'. The main content area shows a form for 'South Building 4th Fl Cell Biology'. The 'Project Status' dropdown menu is highlighted with a red circle, showing the following options: 'Select --', 'Abandoned', 'Closed in Financials', 'Closeout / Post Substantial Completion', 'Completed by Department', 'Construction', 'Design', 'On Hold / Pending', and 'Programming / Planning'. Other fields include 'Program' (ATEST1-WUSM), 'Project ID*' (20160014), 'Name*' (South Building 4th Fl Cell Biology), and 'Location' (0003 - South Medical Building).

Project Closeout Status

- Note the dates for project date tracking; update status on the “Project Date Tracking” tab on the project record

The screenshot shows a web application interface for project management. The top navigation bar includes 'Controls', 'Project Center', 'Portfolio View', 'Map View', and 'Calendar'. The 'Project Center' tab is active, displaying various project details and record types.

Project Details:

- Project Status: Programming / Planning
- Project Type: -- Select --
- Category: -- Select --
- Workflow Status: Draft
- Currency: Dollar (United States of America)
- Target Budget: \$120,000.00
- Target Revenue: \$0.00
- Target Duration: 0 UOM -- Sele
- Target Start/Finish: Apr-11-2016
- Actual Start/Finish: [Empty]
- Percent Complete: 0.00%
- Scope: This is a test to build a new cafe on WUSM campus.

Record Types:

Record Type	Pending	Approved
Action Items	0	0
Correspondence	0	0
Daily Reports	0	0
Drawing Lists	0	0
Drawing Sets	0	0
Meeting Minutes	0	0
Online Submittals	0	0
Punch Lists	0	0
RFIs	0	0
Safety Forms	0	0
Submittal Sets	0	0
Submittal Items	0	0
Transmittals	0	0
DAN Closeout Checklist	2	0
Emergency Form	0	0
WUSM closeout checklist	3	0

Cost Management:

Record Type	Pending	Approved
A/P Payments	0	1
Budget Requests	1	1

Financial Summary:

- Target: \$120,000.00
- Anticipated Cost: \$130,500.00

Project Date Tracking Table:

Spec	UOM	Data
Programming Planning Start Date		
Design Start Date		
Construction Start Date		
Substantial Completion Date		
Occupancy Start Date		
Occupancy End Date		
Project Completion Date		
Date Closed in Financials		
Date assigned to Planner or PM		

Project Closeout Status

- Danforth Roles / Responsibilities
 - PM
 - Upon achieving substantial completion, PM to change the Project Status to “Closeout / Post Substantial Completion”
 - Update date in “Project Date Tracking” tab
 - Accounting
 - When final accounting approval is complete, accountant role to change the Project Status to “Closed in Financials”
 - Update date in “Project Date Tracking” tab

Project Closeout Status

- WUSM Roles and Responsibilities
 - PM
 - Notify Records Coordinator of project closeout status
 - Update date in “Project Date Tracking” tab
 - Records Coordinator
 - Change project status to Closeout/Post Substantial Completion upon receipt of the substantial completion certificate
 - Update date in “Project Date Tracking” tab
 - Note: if this is Phase 1 of a multiphase project that has remaining phases to be completed, Records Coordinator will not select as noted above