


This manual will cover

- CST Work Order entry
- Project Contract Entry
- Contract Entry
-  •Change Order Proposal Entry
- Change Order Entry
- Project Contract Invoice

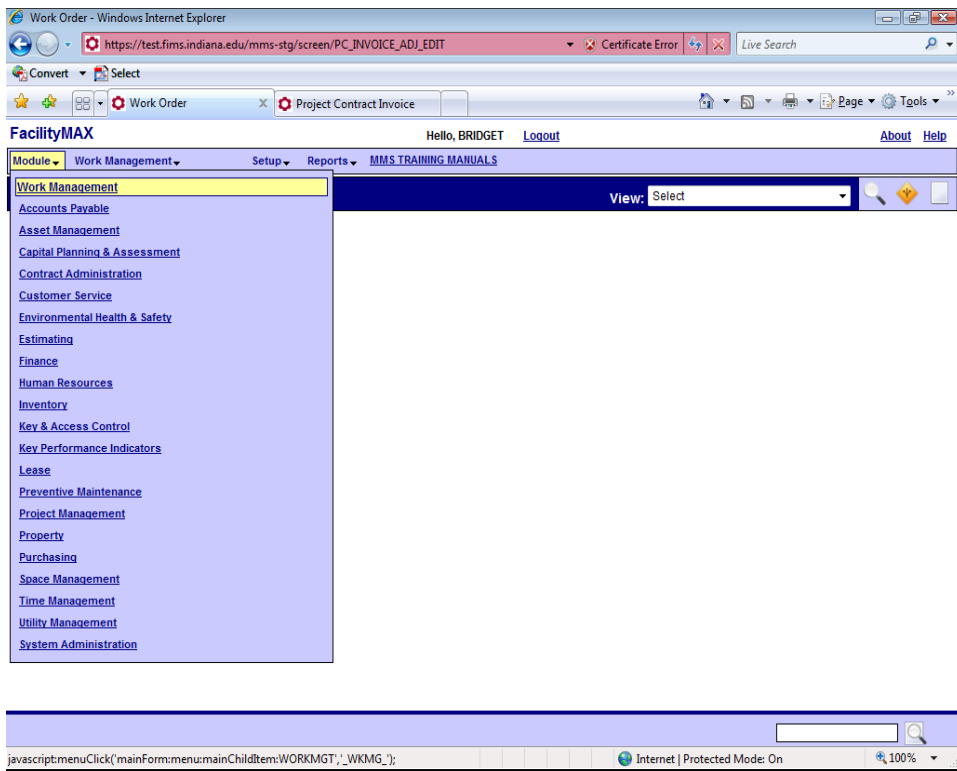
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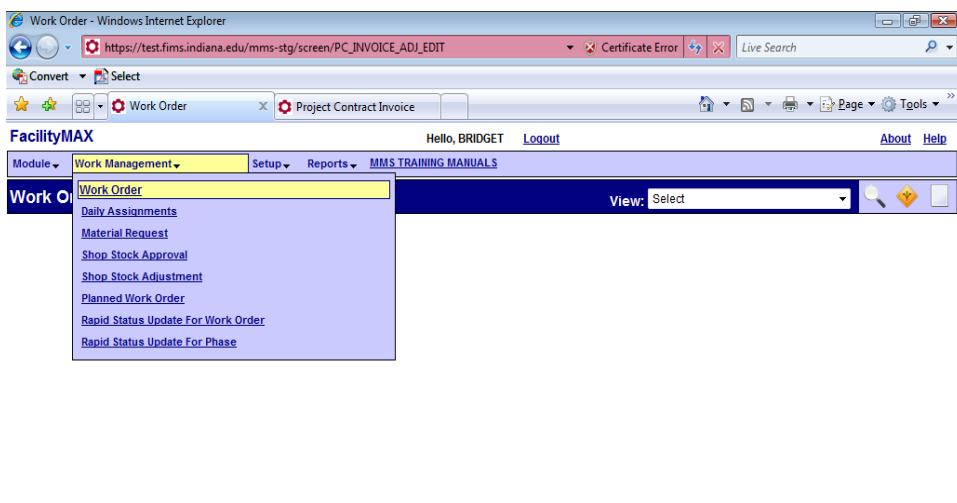
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CST Work Order Entry



To create a work order choose Work Management from the module menu and from the Work Management menu choose Work Order.



Work Order - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PC_INVOICE_ADJ_EDIT

Convert Select

Work Order Project Contract Invoice

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Module Work Management Setup Reports MMS TRAINING MANUALS

Work Order View: Select

Work Order		Created By		Status	
Description		Date Created		Project	
				Desired Date	
				Budget	

Organization	Property	Classification
Organization	Region	Work Request defaults
Requestor	Facility	Type
Contact	Property	Category
Contact Phone		
Contact Email		

Phase

Phase	Description	Location	Shop	Work Code	Priority	Status
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Internet | Protected Mode: On 100%

Above is a blank Work order screen. Click on the new icon.

Enter the description and the Requestor. To choose a requestor enter an A into the requestor field and click on the zoom at the Organization field. If the building information does not populate for you, and you have the property number, enter the property number and click on the zoom at region. It should back fill. You can zoom at property and work your way down. If you already know your project number, you can put it in the project field. Click the green plus to add a phase.

Work Order - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/WO_EDIT

Convert Select

Work Order Project Contract Invoice

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Module Work Management Setup Reports MMS TRAINING MANUALS

Work Order View: Select

Work Order	1293953	Created By	BLGENTRY	Status	10-ENTERED
Description	THE DESCRIPTION FOR THE CST REQUEST GOES HERE.	Date Created	Jul 22, 2009 09:43 PM	Project	
				Desired Date	
				Budget	\$0.00

Organization	Property	Classification
Organization	Region	Work Request defaults
Requestor	Facility	Type
Contact	Property	Category
Contact Phone		
Contact Email		

Organization: UA-UART UNIV ADMIN-UNIVERSITY ARCHITECTS
Requestor: A-ACADEMIC CAMPUS
Contact: TOM SWAFFORD
Contact Phone: 855-6179
Contact Email:

Property: BL BLOOMINGTON
Facility: 1020 N INDIANA 1020 N INDIANA AVE
Property: BL402B 1020 N INDIANA AVE

Classification: Work Request defaults
Type: A UNIVERSITY
Category: A-CST UAO PROJECT COSTS

Phase

Phase	Description	Location	Shop	Work Code	Priority	Status
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Phase - Windows Internet Explorer
 https://test.fims.indiana.edu/mms-stg/screen/PHASE_EDIT

Convert Select

Phase X Phase

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Module Work Management Setup Reports MMS TRAINING MANUALS

Phase View: Select

Phase	001	Created By	BLGENTRY	Status	01-ESTIMAT
		Date Created	Jul 22, 2009 09:56 PM	Work Order	1293953
Description	THE DESCRIPTION FOR THE CST REQUEST GOES HERE.			Budget	\$0.00
				Location	

Shop	A-UAQ/ENGR SERV	Estimated Dates	Classification
Shop	UAQ/ENG ARCHITECT/ENGINEERING	Start	Funding Source
Shop Person		End	Work Code Group
Priority	A-02-ROUTE		Work Code
			A-107 CONST
			UAQ/ENG CONSTRUCTION
			Problem Code

Equipment	Asset	Contractor
Equipment	Asset	Type
Equipment Group	Asset Type	
Template	Asset Group	
PM Standards		

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Fill in the shop, priority and work code. The funding source for A-CST requests should be SHOP. Click on the green done flag when you have finished. Click on the save icon to save the work order.

Work Order - Windows Internet Explorer
 https://test.fims.indiana.edu/mms-stg/screen/WO_EDIT?proposal=1293953

Convert Select

Work Order X Phase

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Module Work Management Setup Reports MMS TRAINING MANUALS

Work Order View: Select

Work Order	1293953	Created By	BLGENTRY	Status	10-ENTERED
		Date Created	Jul 22, 2009 09:43 PM	Project	
Description	THE DESCRIPTION FOR THE CST REQUEST GOES HERE.			Desired Date	
				Budget	\$0.00

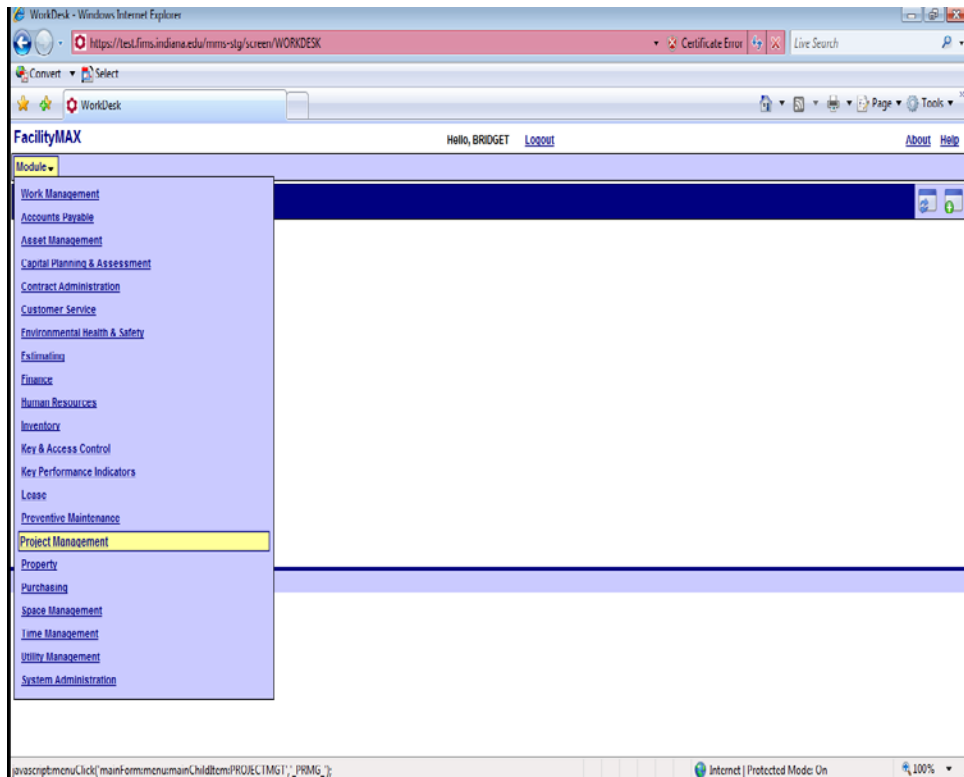
Organization	Property	Classification
Organization	Region	Work Request defaults
UNIV ADMIN-UNIVERSITY ARCHITECTS	BL	
Requestor	BLOOMINGTON	Type
A-ACADEMIC CAMPUS	1020 N INDIANA	A
TOM SWAFFORD	1020 N INDIANA AVE	UNIVERSITY
Contact	Property	Category
TOM SWAFFORD	BL402B	A-CST
Contact Phone	1020 N INDIANA AVE	UAQ PROJECT COSTS
Contact Email		

Phase	Description	Location	Shop	Work Code	Priority	Status
<input type="checkbox"/> 001	THE DESCRIPTION FOR THE CST REQUEST GOES HERE.		A-UAQ/ENGR SERV	A-107 CONST	A-02-ROUTE	01-ESTIMAT

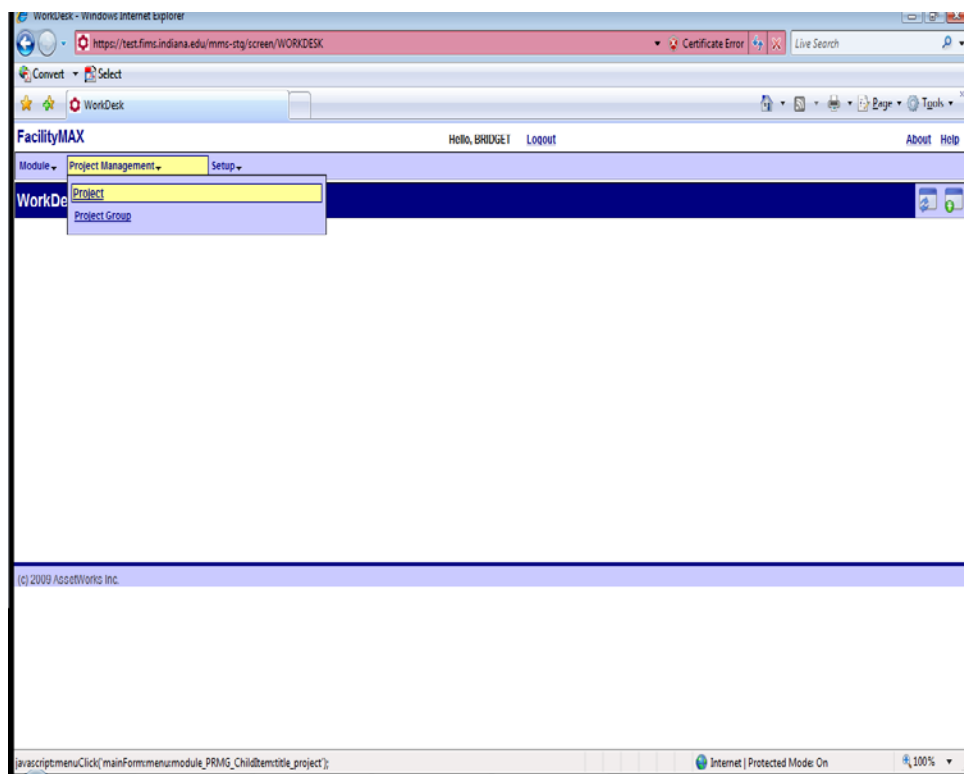
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Project Entry



From the Module menu choose Project Management and from the Project management choose Project



Above is a blank project screen. Click on the NEW icon in the upper right corner.

Fill in the Project Description and Project Type. The status should populate. Fill in the Shop and shop person.

Project - Windows Internet Explorer
 https://test.fims.indiana.edu/mms-stg/screen/PROJECT_EDIT

Convert Select
 Project Contract Project

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Module Project Management Setup

Project View: Select

Project: 20096003 Editor: BLGENTRY
 Edit Date: Jul 20, 2009 07:29 PM

Description: CST - WHITEWATER HALL - ADDITION ESTIMATE

Status: Select
 Extra Description
 Account Setup
 Planned Work Orders
 Budget Change Order
 Cost Analysis
 Notes Log
 User Defined Fields
 Status History
 Related Documents

Project Group: Budget
 Budget: ADD
 ADDITION
 Enforce Distribution: No

Project Manager
 Shop: A-UAQ/ENGR SERV
 UAO/ENG
 Shop Person: JKADEN
 JEFFREY KADEN

Dates
 Start End
 Estimated
 Actual
 Service

Classification
 Project Type: ADD
 ADDITION
 Enforce Distribution: No

Work Orders

Work Order	Description	Status	Budget
1293951	CST-WHITEWATER HALL - FACULTY RESEARCH -	10-ENTERED	\$0.00

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If you need to add any user defined fields, go to the top of the page and click on the drop down menu. Choose User Defined fields.

Fill in any blanks that you need to and click on the green done flag.

User Defined Fields - Windows Internet Explorer
 https://test.fims.indiana.edu/mms-stg/screen/PROJECT_UDF_EDIT

Convert Select
 Project Contract User Defined Fields

FacilityMAX Hello, BRIDGET Logout About Help

Module Project Management Setup

User Defined Fields

Project: 20096003 Editor: BLGENTRY
 Edit Date: Jul 20, 2009 07:29 PM

Description: CST - WHITEWATER HALL - ADDITION ESTIMATE

Gross Sq. Footage: 0
 Assignable Sq. Footage: 0
 State Project Number:
 90 acct.no.1:
 90 acct.no.2:
 90 acct.no.3:
 90 acct.no.4:
 Construction cost:
 Total cost:
 IU BOT Approval:
 BOT Design Approval:
 VPAD Approval 1:

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 Done Internet | Protected Mode: On 100%

Project - Windows Internet Explorer
https://hesd.ferris.edu/mnm-sis/scren/PROJECT_EDIT

Convert Select

Project Management Setup

Project

View: Select

Project	20096003	Editor	BLGENTRY	Status	ENTERED
		Edit Date	Jul 20, 2009 07:12 PM		
Description	CST - WHITEWATER HALL - ADDITION ESTIMATE			Project Group	
				Budget	

Project Manager	Shop	Start	End	Classification
	AJADENGR SERV	Estimated		Project Type
	LAQUING	Actual		ADDITION
Shop Person	JKADEN	Service		Enforce Distribution
	JEFFREY KADEN			No

Work Orders

Work Order	Description	Status	Budget

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Done Internet | Protected Mode: On 100%

Next we can associate a work order. Click on the small green plus 2/3 of the way down the right side of the page.
 Put in the work order number on the search and click on execute search.

Work Order - Windows Internet Explorer
https://hesd.ferris.edu/mnm-sis/scren/SEARCH_WO_FOR_PROJECT

Convert Select

Project Management Setup

Work Order

Work Order

Work Order

1293951

Description

Status

Work Request default

Type

Category

Region

Facility

Property

Requestor

Created By

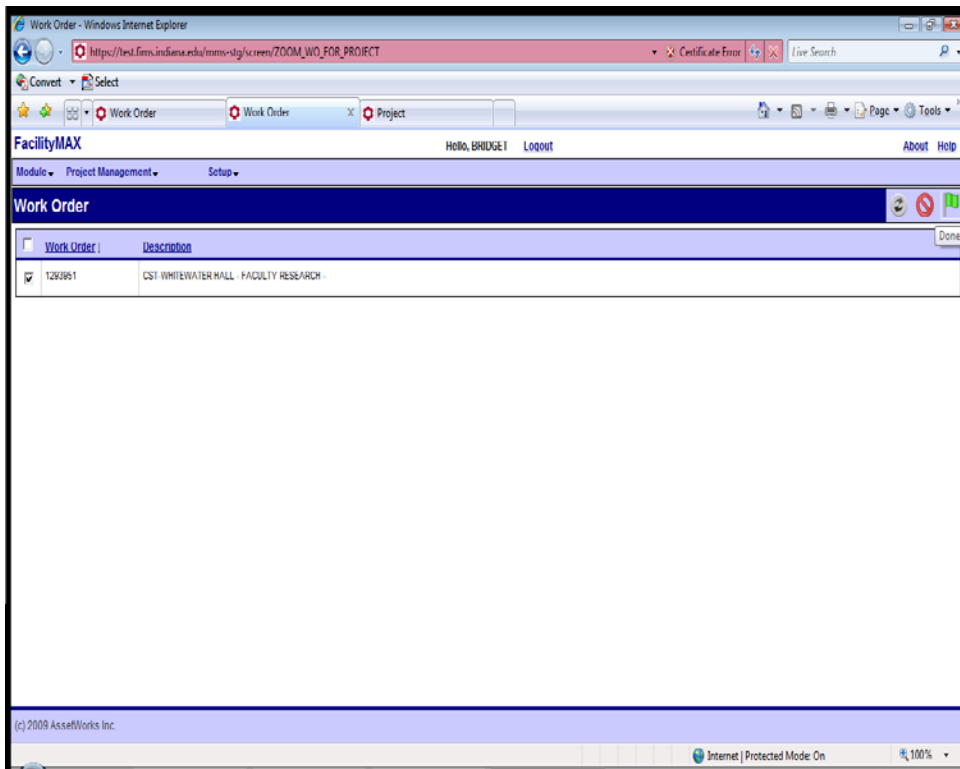
Date Created

Editor

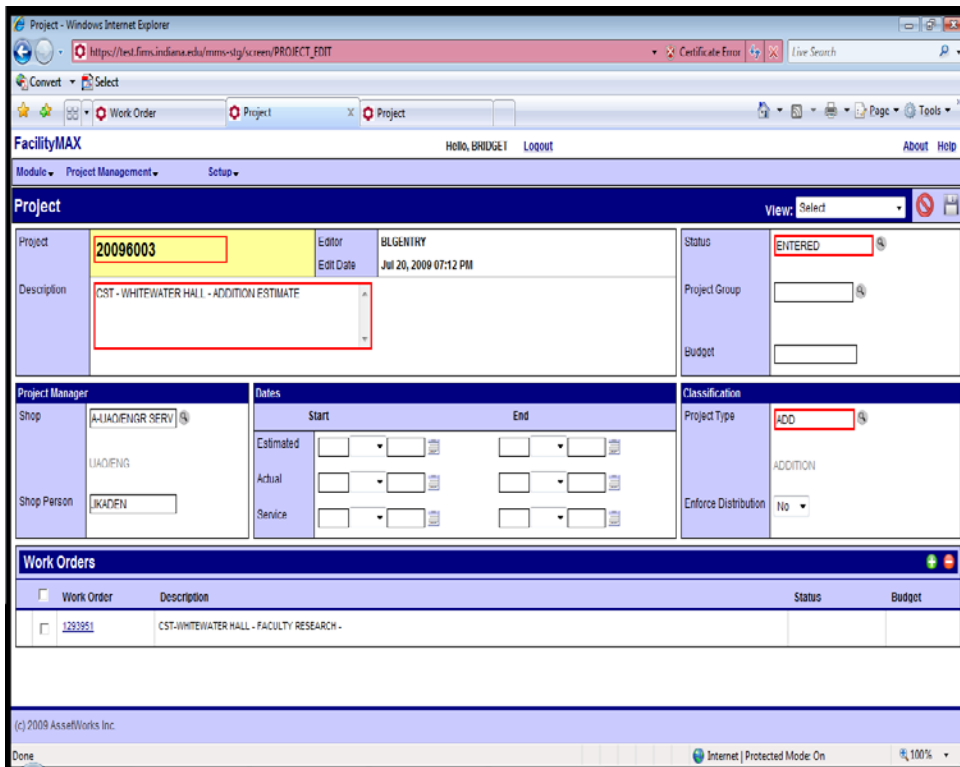
Edit Date

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Internet | Protected Mode: On 100%



Click on the box beside the work order and click on the green done flag. You can now see that the work order is at the bottom of the screen. Click on the save icon.



Project - Windows Internet Explorer
 https://hes.finn.indiana.edu/nms-sis/screen/PROJECT_VIEW/project=20096003
 Certificate Error Live Search

Convert Select

Work Order Project Project

FacilityMAX Hello, BRIDGET Logout About Help

Module Project Management Setup

Project View: Select

Project	20096003	Editor	BLGENTRY	Status	ENTERED	Print
		Edit Date	Jul 20, 2009 07:29 PM			
Description	CST - WHITEWATER HALL - ADDITION ESTIMATE			Project Group		
				Budget		

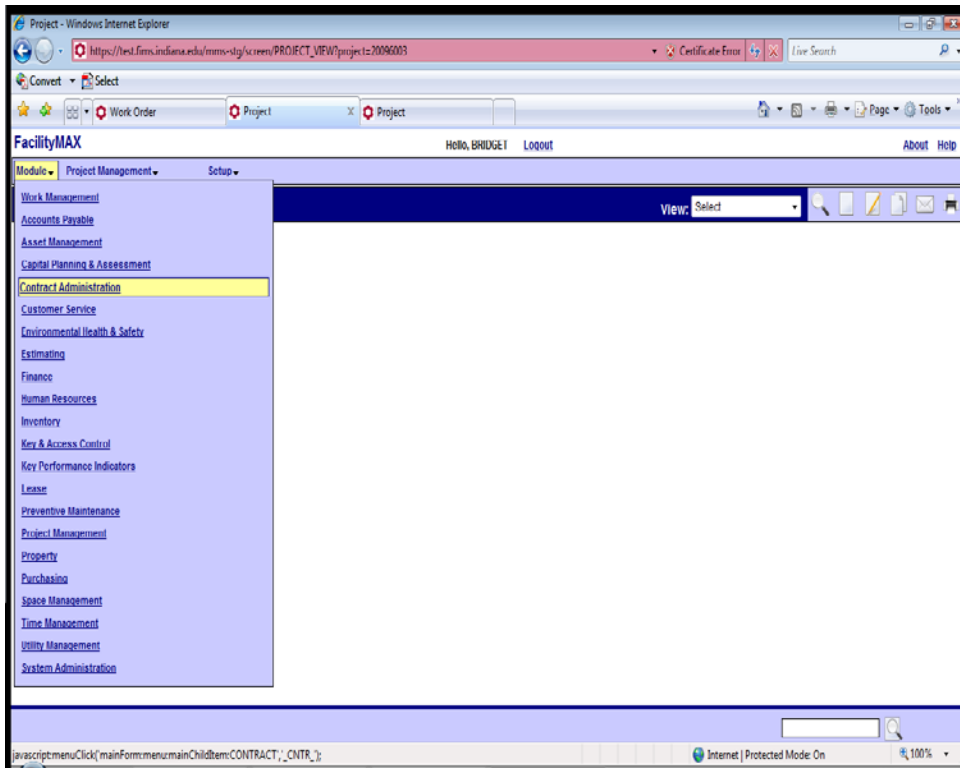
Project Manager	Dates	Classification
Shop	Start	End
A. UAO/ENGR SERV	Estimated	
UAD/ENG	Actual	
Shop Person	Service	
J. KADEN		
JEFFREY KADEN		
		Project Type
		ADD
		ADDITION
		Enforce Distribution
		No

Work Orders			
Work Order	Description	Status	Budget
1293951	CST-WHITEWATER HALL - FACULTY RESEARCH -	10-ENTERED	\$0.00

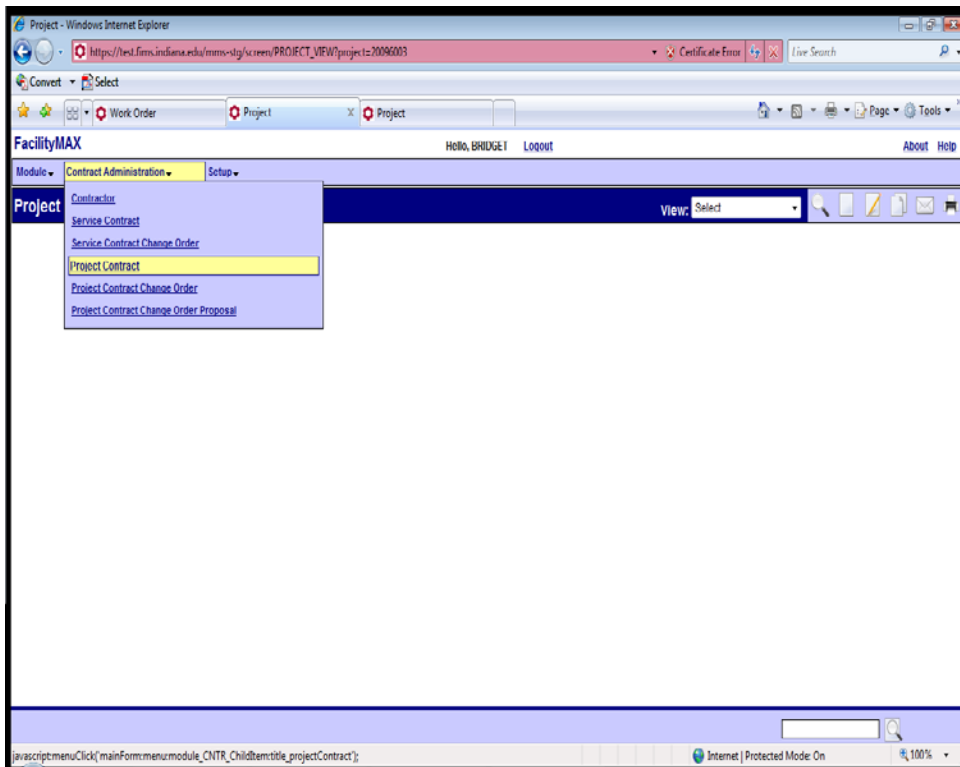
Done Internet | Protected Mode: On 100%

Above you will see a finished project entry

Contract Entry



From the module menu choose Contract Administration and from the Contract Administration menu choose Project Contract.



Project Contract - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/WORKDESK

Convert Select

Project Contract

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Project Contract View: Select

Contract Number		Editor		Status	
Description		Edit Date		Type	
				Method	
				Retainage	
				Retainage Balance	\$0.00

Contractor	Dates	Totals
Contractor	Request	Currency
Address Code	Award	Estimate
	Review	Budget
	Start	Award
	End	Change Order
		Total
		Invoiced
		Remaining

Line Items

Above is a blank contract page. Click on the NEW icon at the top right. Fill in the description, choose the type and status. (you can use the zoom if needed) Add your contractor and any dates you need to fill in. If you need to add user defined fields, go to the drop down menu at the top of the page and go to User Defined fields.

Project Contract - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_EDIT

Convert Select

Project Contract Line Item

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Project Contract View: Select

Contract Number	CONTRACT1102	Editor	BLGENTRY	Status	
Description	THIS IS WHERE WE PUT THE CONTRACT DESCRIPTION	Edit Date	Jul 22, 2009 05:55 PM	Type	
				Method	
				Retainage	
				Retainage Balance	\$0.00

Contractor	Dates	Totals
Contractor	Request	Currency
Address Code	Award	Estimate
	Review	Budget
	Start	Award
	End	Change Order
		Total
		Invoiced
		Remaining

Line Items

Line	Line Group	Description	Project	Work Order	Phase	Punch List	Invoiced
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User Defined Fields - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_UDF_EDIT

Convert Select

User Defined Fields Line Item

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Module Contract Administration Setup

User Defined Fields

Contract Number	CONTRACT1102	Editor	BLGENTRY
Description	THIS IS WHERE WE PUT THE CONTRACT DESCRIPTION		

Final Waiver of Lien form	<input type="text" value="N"/>
Consent of Surety	<input type="text" value="N"/>
O&M Manuals	<input type="text"/> <input type="text"/>
Final Pay Application	<input type="text"/> <input type="text"/>
Dataflex order no.	<input type="text"/>
Escrow agent	<input type="text"/>
Escrow account	<input type="text"/>
Object code	<input type="text"/>
Claim filed	<input type="text" value="N"/>

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Done Internet | Protected Mode: On 100%

Fill in any user defined fields that you need to and then click on the green done flag

Next click on the small green plus sign to add a line item and associate a project and work order.

Project Contract - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_EDIT

Convert Select

Project Contract Project Contract

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Project Contract

View: Select

Contract Number	CONTRACT1102	Editor		Status	09-ADS
Description	THIS IS WHERE WE PUT THE CONTRACT DESCRIPTION			Type	GENERAL
				Method	GENERAL CONSTRUCTION
				Retainage	
				Retainage Balance	\$0.00

Contractor	Dates	Totals
Contractor	Request	Currency
Address Code	Award	Estimate
Terms	Review	Budget
	Start	Award
	End	Change Order
		Total
		Invoiced
		Remaining

Line	Line Group	Description	Project	Work Order	Phase	Punch List	Invoiced
------	------------	-------------	---------	------------	-------	------------	----------

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Done Internet | Protected Mode: On 100%

Line Item - Windows Internet Explorer
https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_LINE_ITEM_EDIT Certificate Error Live Search

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Line Item View: Select

Line	1	Editor	BLGENTRY	Contract Number	CONTRACT1102
Description		Edit Date	Jul 22, 2009 05:46 PM		THIS IS WHERE WE PUT THE
				Line Group	

Work Order	Retainage	Totals
Project: 20096003	Retainage	Award: \$23,546.88
Work Order: 1293951	Release: No	Tax 1:
CST-WHITEWATER HALL - FACULTY	Verify Punch List: No	Tax 2:
Phase: 001	Retainage: \$0.00	Tax Rebate: ()
PROJECT COST ESTIMATE	Retainage Held: \$0.00	Change Order: \$0.00
Phase Estimate: \$0.00	Retainage Balance: \$0.00	Line Total: \$23,546.88
Phase Budget: \$0.00		Invoiced: \$0.00
		Invoiced Tax: \$0.00
		Remaining: \$23,546.88

Punch List

Sequence	Description	Date Completed

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Internet | Protected Mode: On 100%

On the line item add your work order and phase. Enter the award amount if you have that.

If you need to enter user defined fields for the line item, go to the top of the page and click on User defined fields in the drop down menu.

Line Item - Windows Internet Explorer
https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_LINE_ITEM_EDIT Certificate Error Live Search

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Module Contract Administration Setup

Line Item View: Select

Line	1	Editor	BLGENTRY	Contract Number	02
Description		Edit Date	Jul 22, 2009 05:55 PM		THIS IS WHERE WE PUT THE
				Line Group	

Work Order	Retainage	Totals
Project: 20096003	Retainage	Award: \$23,546.88
Work Order: 1293951	Release: No	Tax 1:
CST-WHITEWATER HALL - FACULTY	Verify Punch List: No	Tax 2:
Phase: 001	Retainage: \$0.00	Tax Rebate: ()
PROJECT COST ESTIMATE	Retainage Held: \$0.00	Change Order: \$0.00
Phase Estimate: \$0.00	Retainage Balance: \$0.00	Line Total: \$23,546.88
Phase Budget: \$0.00		Invoiced: \$0.00
		Invoiced Tax: \$0.00
		Remaining: \$23,546.88

Punch List

Sequence	Description	Date Completed

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Done Internet | Protected Mode: On 100%

User Defined Fields - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_LINE_ITEM_UDF_EDIT

Convert Select

User Defined Fields Line Item

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

User Defined Fields

Line	1	Editor	BLGENTRY
Description		Edit Date	Jul 22, 2009 05:55 PM

Contract Contractor	
EOC form recieved	
Sub Contractor 01	NO SUB #01
EOC form recieved	
Sub Contractor 02	NO SUB #02
EOC form recieved	
Sub Contractor 03	NO SUB #03
EOC form recieved	
Sub Contractor 04	NO SUB #04
EOC form recieved	
Sub Contractor 05	NO SUB #05
EOC form recieved	

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Done Internet | Protected Mode: On 100%

Fill in any user defined fields that you need to. Click on the green done flag when you are done. That takes you back to the line item. Click on the green done flag on the line item to get back to the main contract page. Now click on the save icon.

Project Contract - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_EDIT

Convert Select

Project Contract Line Item

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Project Contract

View: Select

Contract Number	CONTRACT1102	Editor	
Description	THIS IS WHERE WE PUT THE CONTRACT DESCRIPTION	Edit Date	

Status	09-ADS
Type	GENERAL
Method	GENERAL CONSTRUCTION
Retainage	
Retainage Balance	\$0.00

Contractor	CONTRACT	Dates	
Address Code	01	Request	24 Jul 2009
Terms		Award	
		Review	
		Start	
		End	

Totals	
Currency	USD
Estimate	\$0.00
Budget	\$0.00
Award	\$23,546.88
Change Order	\$0.00
Total	\$23,546.88
Invoiced	\$0.00
Remaining	\$23,546.88

Line Items

Line	Line Group	Description	Project	Work Order	Phase	Punch List	Invoiced
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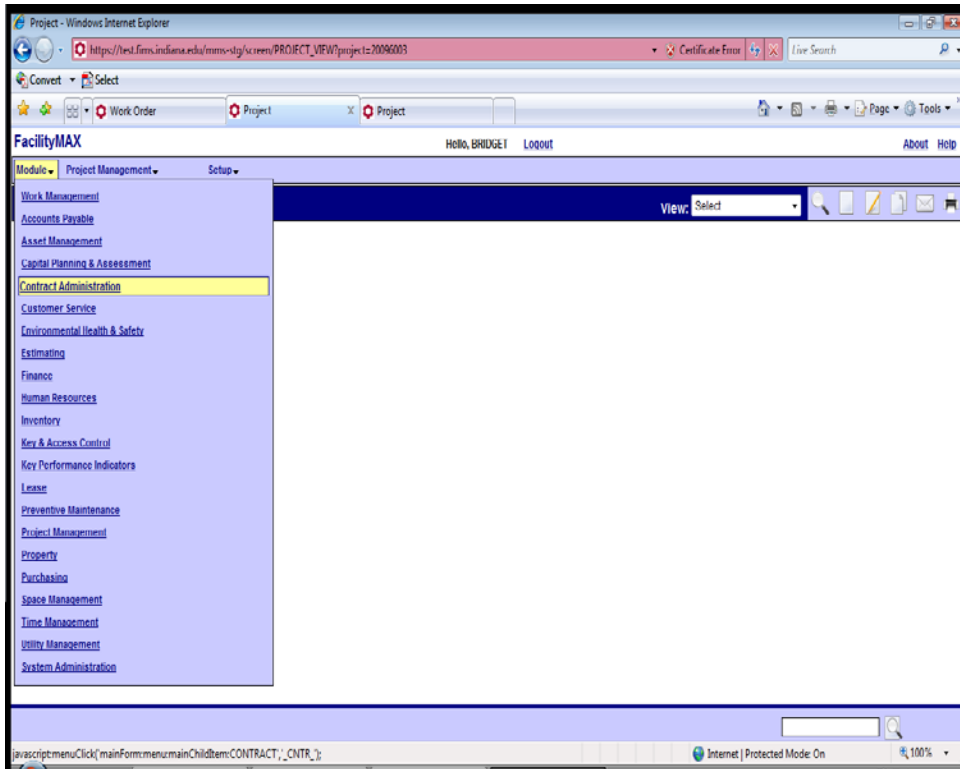
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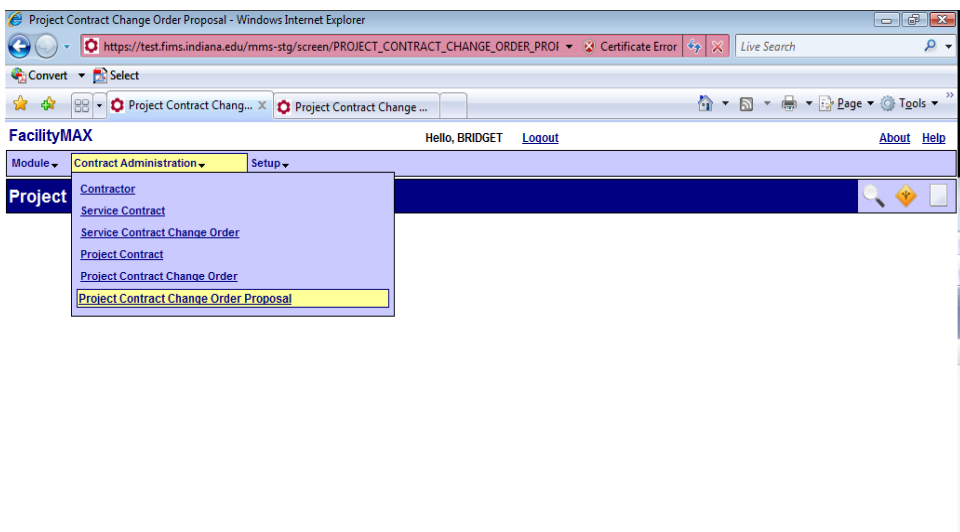


Project Contract Change Order Proposal

This is a new screen in MMS. It allows you to create a Change Order proposal which can later be pulled into a change order when the change order is ready to be created. Think of it as a future change order.



To create a Change Order Proposal choose Contract Administration from the module menu and from the Contract Administration menu choose Project Contract Change Order Proposal.



Project Contract Change Order Proposal - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_PROI Certificate Error Live Search

Convert Select

Project Contract Chang... X Project Contract Change ...

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Project Contract Change Order Proposal

Amendment		Editor		Processed	
Description		Edit Date		Reason	
				Change Order	

Contract	Dates	Totals
Contract	Created	Change Amount
Contract Line	Review	Tax 1
Line Group	Current End Date	Tax 2
	New End Date	Tax Rebate
		Proposed Total
		\$0.00

Internet | Protected Mode: On 100%

Above is a new change Order Proposal screen. Click on the new icon.

Fill in the description, select the contract, choose a reason code, enter the change order amount. Refresh your totals to see the proposed total. Click on Save.

Project Contract Change Order Proposal - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_PROI Certificate Error Live Search

Convert Select

Project Contract Chang... X Project Contract Change ...

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Module Contract Administration Setup

Project Contract Change Order Proposal

Amendment	1001	Editor	BLGENTRY	Processed	No
Description	CHANGE ORDER DESCRIPTION GOES HERE.	Edit Date	Jul 22, 2009 07:42 PM	Reason	XXXX
				Change Order	NONE

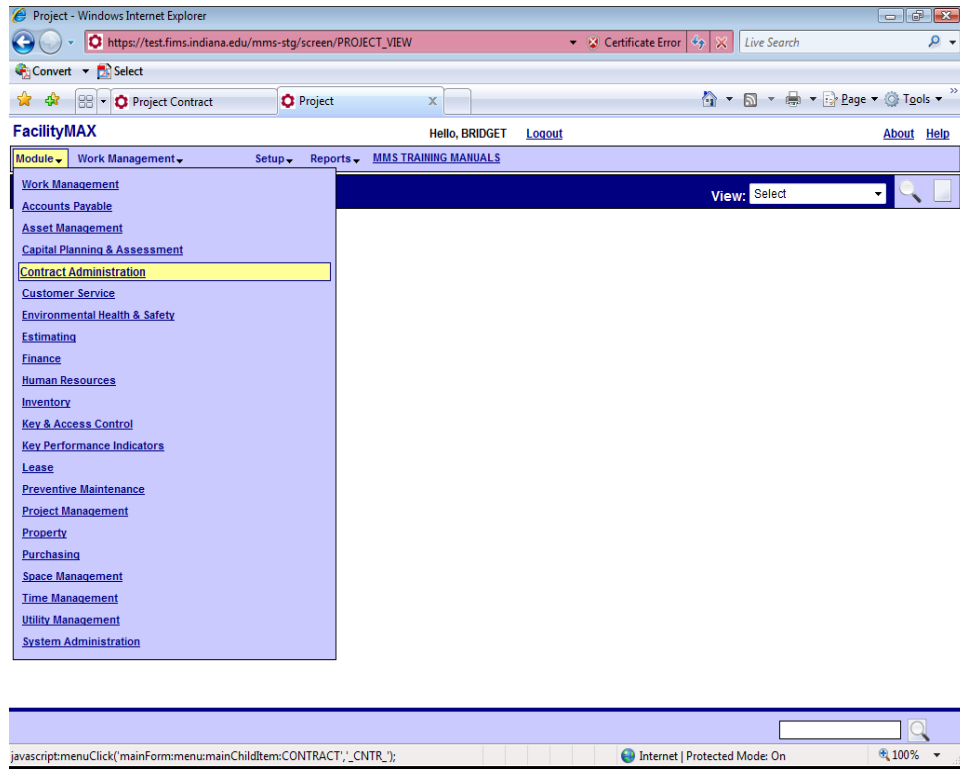
Contract	Dates	Totals
Contract	Created	Change Amount
Contract Line	Review	Tax 1
Line Group	Current End Date	Tax 2
	New End Date	Tax Rebate
		Proposed Total
		\$8,652.00

Refresh Totals

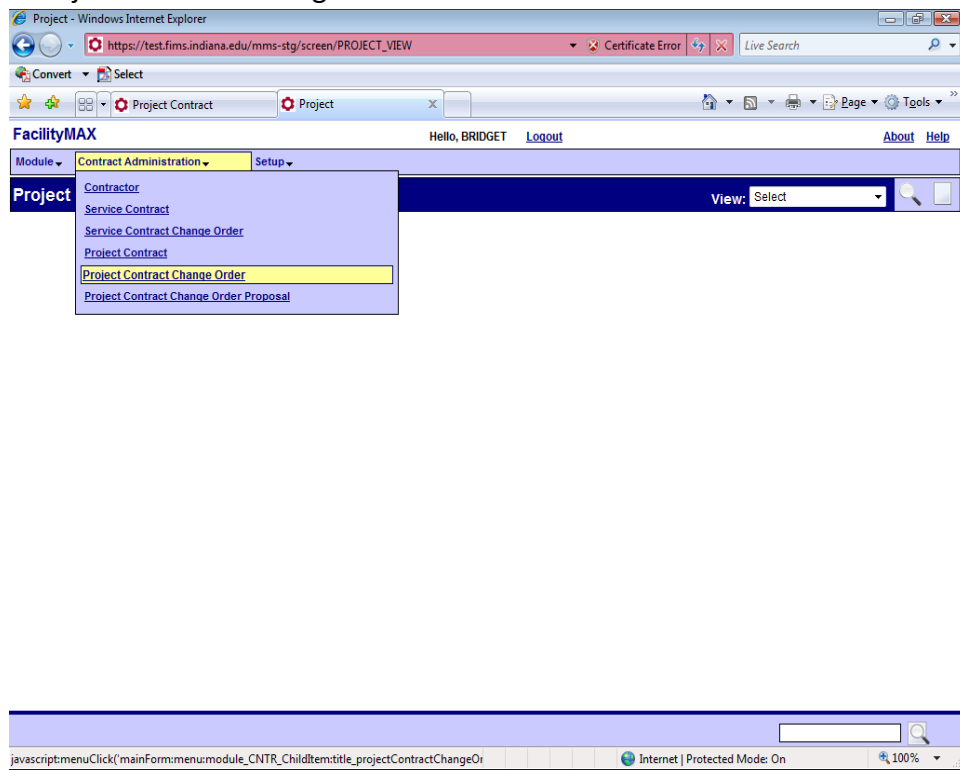
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Change Order



To enter a Change Order, choose Contract Administration from the module menu. Then from the Contract Administration menu choose Project Contract Change Order



Project Contract Change Order - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_VIEW

Convert Select

Project Contract Project Contract Chang...

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Project Contract Change Order View: Select

Change Order		Editor		Status	
Description		Edit Date		Change Order Date	
				Total	\$0.00

Contractor	
Contractor	
Address Code	
Contract	

Sequence	Description	Contract Line	Line Group	Amendment	Reason	Line Total
----------	-------------	---------------	------------	-----------	--------	------------

Done Internet | Protected Mode: On 100%

Above you will see a blank change order screen. Click on the new ICON. Rename your change order with the contract number – change order number. Enter your description. Choose the contract. You can either load a change order proposal or Click on the green plus sign to add line item.

Project Contract Change Order - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_EDIT

Convert Select

Project Contract Chang... Project Contract Change ...

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Project Contract Change Order View: Select

Change Order	999-001	Editor	BLGENTRY	Status	10-ENTERED
Description	description of change order goes here.	Edit Date	Jul 22, 2009 06:41 PM	Change Order Date	22 Jul 2009
				Total	\$0.00

Contractor	
Contractor	35160810000P
Address Code	VPS ARCHITECTURE
Contract	01
	CONTRACT999
	WELLS LIBRARY 044 RENOVATE FOR

Sequence	Description	Contract Line	Line Group	Amendment	Reason	Line Total
----------	-------------	---------------	------------	-----------	--------	------------

Load Proposals

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Project Contract Change Order - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_EDIT

FacilityMAX

Module: Contract Administration Setup

Project Contract Change Order

View: Select

Change Order	999-002	Editor	BLGENTRY	Status	10-ENTERED
Description		Edit Date	Jul 22, 2009 07:50 PM	Change Order Date	22 Jul 2009
				Total	\$0.00

Contractor	35160810000P
Contractor	VPS ARCHITECTURE
Address Code	01
Contract	CONTRACT999
WELLS LIBRARY 044 RENOVATE FOR	

Line Items

Load Proposals

Sequence	Description	Contract Line	Line Group	Amendment	Reason	Line Total

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Done

Internet | Protected Mode: On

Let's try loading a proposal. Click on the load proposals icon beside the green plus.

You will see the change order proposal that we created earlier. Check the box and click on the green done flag. If there are several proposals, you will only need to check the box of the proposal you want to roll into a change order. Click the green done flag.

Project Contract Change Order Proposal - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/ZOOM_PROPOSALS_MULTI_SELECT

FacilityMAX

Module: Contract Administration Setup

Project Contract Change Order Proposal

Amendment	Description
<input checked="" type="checkbox"/> 1001	CHANGE ORDER DESCRIPTION GOES HERE.

Project Contract Change Order - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_EDIT

Convert Select

Project Contract Change...

Project Contract Change...

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Project Contract Change Order View: Select

Change Order: 999-002 Editor: BLGENTRY Edit Date: Jul 22, 2009 07:50 PM Status: 10-ENTERED

Description: Change order description goes here.

Change Order Date: 22 Jul 2009

Total: \$0.00

Contractor

Contractor: 35160810000P VPS ARCHITECTURE

Address Code: 01

Contract: CONTRACT999 WELLS LIBRARY 044 RENOVATE FOR

Line Items Load Proposals

Sequence	Description	Contract Line	Line Group	Amendment	Reason	Line Total
1	CHANGE ORDER DESCRIPTION GOES HERE.	1		1001	XXXX	\$8,652.00

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Done Internet | Protected Mode: On 100%

The change order proposal has rolled into the change order as line item one. If you have any user defined fields for the change order, you will still need to enter those by going to the User defined fields screen on the drop down menu at the top of the screen.

Project Contract Change Order - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_EDIT

Convert Select

Project Contract Change...

Project Contract Change...

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Project Contract Change Order View: Select

Change Order: 999-002 Editor: BLGENTRY Edit Date: Jul 22, 2009 08:01 PM Status: 10-ENTERED

Description: CHANGE ORDER DESCRIPTION GOES HERE.

Change Order Date: 22 Jul 2009

Total: \$8,652.00

Contractor

Contractor: 35160810000P VPS ARCHITECTURE

Address Code: 01

Contract: [CONTRACT999](#) WELLS LIBRARY 044 RENOVATE FOR

Line Items Load Proposals

Sequence	Description	Contract Line	Line Group	Amendment	Reason	Line Total
1	CHANGE ORDER DESCRIPTION GOES HERE.	1		1001	XXXX	\$8,652.00

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User Defined Fields - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_UDE... Certificate Error Live Search

Convert Select

User Defined Fields Project Contract Change ...

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Module Contract Administration Setup

User Defined Fields

Change Order	999-002	Editor	BLGENTRY
Description	CHANGE ORDER DESCRIPTION GOES HERE.		
Outside CD number	<input type="text"/>		
CD Date	<input type="text"/>		
Contr approval date	<input type="text"/>		
A/E Approval date	<input type="text"/>		
Prj.Mgr approval date	<input type="text"/>		
Team Ldr approval date	<input type="text"/>		
VPAD recd date	<input type="text"/>		
VPAD approval date	<input type="text"/>		
Executed Mailed date	<input type="text"/>		
Alternate Account	N		

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Fill in any user defined fields that you need to and click on the green done flag. Once you are back to the Change order screen click on the save icon.

Project Contract Change Order - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_VIEW... Certificate Error Live Search

Convert Select

Project Contract Change... Project Contract Change...

FacilityMAX Hello, BRIDGET Logout About Help

Module Contract Administration Setup

Project Contract Change Order

View: Select

Change Order	999-002	Editor	BLGENTRY	Status	10-ENTERED
Description	CHANGE ORDER DESCRIPTION GOES HERE.			Change Order Date	Jul 22, 2009
				Total	\$8,652.00

Contractor	
Contractor	35160810000P
	VPS ARCHITECTURE
Address Code	01
Contract	CONTRACT999
	WELLS LIBRARY 044 RENOVATE FOR

Line Items						
Sequence	Description	Contract Line	Line Group	Amendment	Reason	Line Total
1	CHANGE ORDER DESCRIPTION GOES HERE.	1		1001	XXXX	\$8,652.00

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Project Contract Change Order - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_EDIT

Convert Select

Project Contract Chang... Project Contract Change ...

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Module Contract Administration Setup

Project Contract Change Order View: Select

Change Order	999-002	Editor	BLGENTRY	Status	10-ENTERED
		Edit Date	Jul 22, 2009 07:50 PM		
Description	Change order description goes here.			Change Order Date	22 Jul 2009
				Total	\$0.00

Contractor	35160810000P
Contractor	VPS ARCHITECTURE
Address Code	01
Contract	CONTRACT999
	WELLS LIBRARY 044 RENOVATE FOR

Line Items Load Proposals

Sequence	Description	Contract Line	Line Group	Amendment	Reason	Line Total
1	CHANGE ORDER DESCRIPTION GOES HERE.	1		1001	XXXX	\$8,652.00

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Let's look at creating a Change Order with out a contract proposal. Click on the green plus.

Click on Adjust contract line. (We only do one contract line for each contract so we do not want to add, only adjust.) Click the green flag.

Project Contract Change Order - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/CHANGE_ORDER_TYPE_EDIT

Convert Select

Project Contract Chang... Project Contract Change ...

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Module Contract Administration Setup

Project Contract Change Order

Project Contract Change Order Type

Please Select:

☐ Add New Contract Line

☒ Adjust Contract Line

Project Contract Change Order Line Item - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_LINE

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Module Contract Administration Setup

Project Contract Change Order Line Item View: Select

Sequence 1 Editor FF Edit Date Jun 29, 2009 08:18 PM

Description

Current End Date Aug 14, 2009

New End Date

Change Order 975-001

UTILITY TUNNEL PROJ-RAN NEW

Contract Line Item		Amendment		Totals	
Contract Line	1	Amendment Number		Change Amount	\$4,895.33
Line Group		Reason		Tax 1	
Project	20074423			Tax 2	
Work Order	983102			Tax Rebate	
Phase	003	Proposed Total	\$0.00	Line Total	\$4,186.00
	GENERAL CONSTRUCTION				

Enter 1 for the contract line and validate by clicking the zoom icon. Enter the change order amount. Lets look at the reason code now.

Project Contract Change Order Line Item - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_LINE

FacilityMAX

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Module Contract Administration Setup

Project Contract Change Order Line Item View: Select

Sequence 1 Editor FF Edit Date Jun 29, 2009 08:18 PM

Description

Current End Date Aug 14, 2009

New End Date

Change Order 975-001

UTILITY TUNNEL PROJ-RAN NEW

Contract Line Item		Amendment		Totals	
Contract Line	1	Amendment Number		Change Amount	\$4,895.33
Line Group		Reason		Tax 1	
Project	20074423			Tax 2	
Work Order	983102			Tax Rebate	
Phase	003	Proposed Total	\$0.00	Line Total	\$4,186.00
	GENERAL CONSTRUCTION				

Change Order Reason - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/ZOOM_REASON

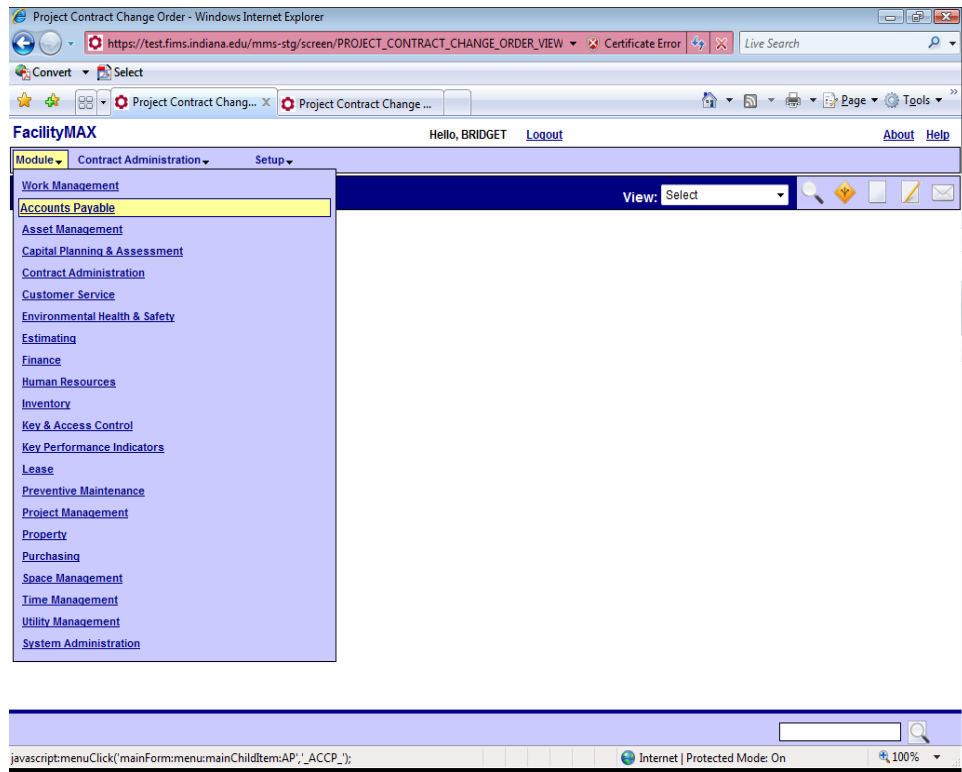
Reason	Description
SEHO	SCOPE, ERROR, HIDDEN, OMISSION
SEHX	SCOPE, ERROR & HIDDEN
SEXO	SCOPE, ERROR AND OMISSION
SEXX	SCOPE & ERROR
SVHO	SCOPE, HIDDEN AND OMISSION
SVHX	SCOPE AND HIDDEN
SVOO	SCOPE AND OMISSION
SVOX	SCOPE
XEHO	ERROR, HIDDEN AND OMISSION
XEHX	ERROR AND HIDDEN

Page 1 of 2 Records Found = 16

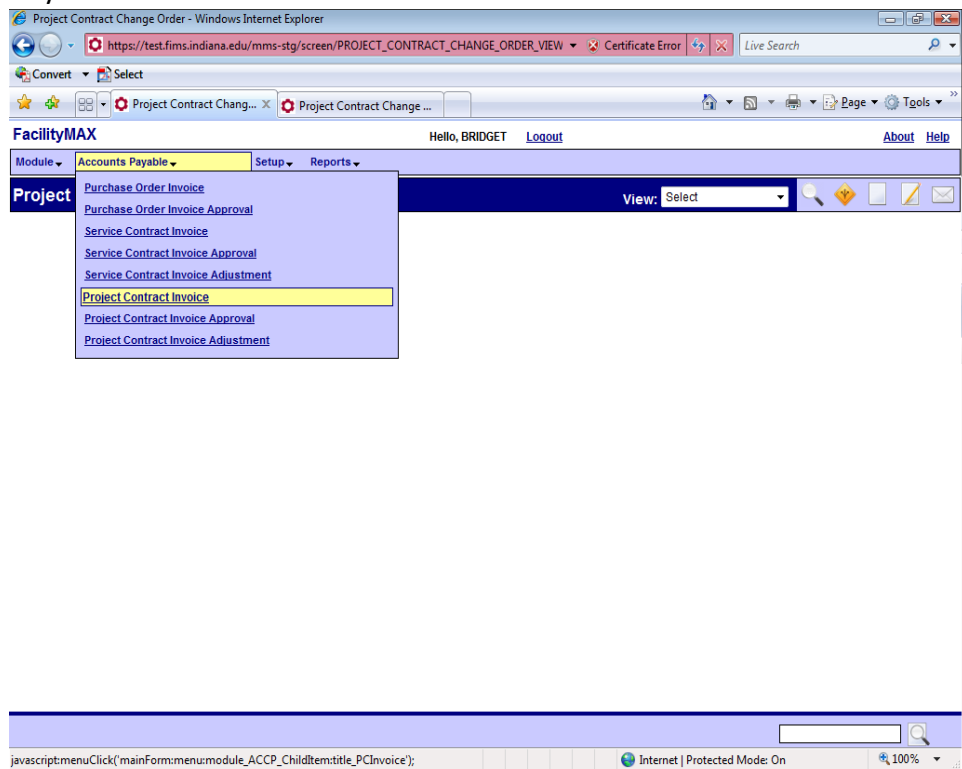
Internet Protected Mode: On 100%

In the picture above, I have clicked on the Reason code zoom icon. This shows the choices for reason code. Choose your reason code. You can now click on the done flag. You should now be at the change order screen and can click on save.

Project Contract Invoice



To do a Project Contract Invoice, choose Accounts Payable from the module menu and choose Project Contract Invoice from the Accounts Payable menu.



Project Contract Invoice - Windows Internet Explorer
 https://test.fims.indiana.edu/mms-stg/screen/PROJECT_CONTRACT_CHANGE_ORDER_VIEW Certificate Error Live Search

Convert Select
 Project Contract Invoice Project Contract Change ...

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Module Accounts Payable Setup Reports

Project Contract Invoice View: Select

Transaction		Editor		Status	
Description		Edit Date			

Contractor	Invoice Information	Totals
Contractor	Invoice Number	Currency
Address Code	Invoice Date	Sub Total \$0.00
Contract		Retainage 0.00% \$0.00
Terms		Tax \$0.00
		Markup \$0.00
		Total \$0.00

Line Items

Sequence	Description	Contract Line	Line Group	Sub Total	Retained	Retainage Paid	Tax	Line Total
----------	-------------	---------------	------------	-----------	----------	----------------	-----	------------

Done Internet | Protected Mode: On 100%

Above is a new project contract invoice. Click on the new icon.
 Enter the contract number and click on the zoom icon at the contractor field. The contractor and address code will populate. Enter the invoice number and invoice date. Now click on the load contract line items icon.

Project Contract Invoice - Windows Internet Explorer
 https://test.fims.indiana.edu/mms-stg/screen/PC_INVOICE_EDIT Certificate Error Live Search

Convert Select
 Project Contract Invoice Project Contract Invoice

FacilityMAX Hello, BRIDGET Logout About Help

Module Accounts Payable Setup Reports

Project Contract Invoice View: Select

Transaction	5004	Editor	BLGENTRY	Status	10-ENTERED
Description	description goes here.	Edit Date	Jul 22, 2009 08:30 PM		

Contractor	Invoice Information	Totals
Contractor	Invoice Number	Currency
VPS ARCHITECTURE	5478546inv	USD
Address Code	Invoice Date	Sub Total \$0.00
01	15 Jul 2009	Retainage \$0.00
Contract		Tax \$0.00
CONTRACT999		Markup \$0.00
Terms		Total \$0.00

Line Items Load Contract Line Items

Sequence	Description	Contract Line	Line Group	Sub Total	Retained	Retainage Paid	Tax	Line Total
----------	-------------	---------------	------------	-----------	----------	----------------	-----	------------

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Project Contract Transactions - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PC_LOAD_TRANSACTIONS

Project Contract Transactions

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Module Accounts Payable Setup Reports

Project Contract Transactions

<input type="checkbox"/>	Contract Number	Contract Line	Description	Line Group	Work Order	Phase	Original Amount	Change Order
<input checked="" type="checkbox"/>	CONTRACT999	1			833883	002	\$58,302.00	\$0.00

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Click on the contract line box and click the green done flag.
Notice the contract line is now filled in.

Project Contract Invoice - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PC_INVOICE_EDIT

Project Contract Invoice

FacilityMAX Hello, BRIDGET Logout About Help

Module Accounts Payable Setup Reports

Project Contract Invoice View: Select

Transaction	5004	Editor	BLGENTRY	Status	10-ENTERED
Description	DESCRIPTION GOES HERE.				
Contractor	35160810000P		Invoice Information	Totals	
Contractor	VPS ARCHITECTURE		Invoice Number	Currency USD	
Address Code	01		Invoice Date	Sub Total \$58,302.00	
Contract	CONTRACT999			Retainage \$0.00	
Terms				Tax \$0.00	
				Markup \$0.00	
				Total \$58,302.00	

Line Items Load Contract Line Items

<input type="checkbox"/>	Sequence	Description	Contract Line	Line Group	Sub Total	Retained	Retainage Paid	Tax	Line Total
<input checked="" type="checkbox"/>	1		1		\$58,302.00	\$0.00		\$0.00	\$58,302.00

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Project Contract Invoice - Windows Internet Explorer
 https://test.fims.indiana.edu/mms-stg/screen/PC_INVOICE_EDIT
 Certificate Error Live Search

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Module Accounts Payable Setup Reports

Project Contract Invoice View: Select

Transaction: 5004 Editor: BLGENTRY Edit Date: Jul 22, 2009 08:30 PM Status: 65
 Description: DESCRIPTION GOES HERE.

Contractor: 35160810000P VPS ARCHITECTURE Address Code: 01 Contract: CONTRACT999 Terms:

Invoice Information: Invoice Number: 5478546INV Invoice Date: 16 Jul 2009

Totals: Currency: USD Sub Total: \$58,302.00 Retainage: \$0.00 Tax: \$0.00 Markup: \$0.00 Total: \$58,302.00

Line Items Load Contract Line Items

Sequence	Description	Contract Line	Line Group	Sub Total	Retained	Retainage Paid	Tax	Line Total
1		1		\$58,302.00	\$0.00	\$0.00	\$0.00	\$58,302.00

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Now you need to fill in the user defined fields. From the drop down menu at the top of the page, choose User defined fields. The red boxes are the required fields. Fill in the information that you have and click on the green done flag.

User Defined Fields - Windows Internet Explorer
 https://test.fims.indiana.edu/mms-stg/screen/PC_INVOICE_UDF_EDIT
 Certificate Error Live Search

FacilityMAX Hello, BRIDGET Logout About Help

Module Accounts Payable Setup Reports

User Defined Fields

Transaction: 5004 Editor: BLGENTRY Edit Date: Jul 22, 2009 08:30 PM Description: DESCRIPTION GOES HERE.

Payment Number: 1 Amount to contractor: 29151.00 Retainage to bank: 29151.00 Retainage released: 0.0 Final Pay App?: N

Contractor Approver: Contractor date apprvd: Arch/Engr approver: A/E date approved: Project Manager approver: Prj.Mgr. date approved: Team Leader approver:

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Project Contract Invoice - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PC_INVOICE_EDIT

Project Contract Invoice

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Module Accounts Payable Setup Reports

Project Contract Invoice View: Select

Transaction	5004	Editor	BLGENTRY	Status	10-ENTERED
Description	DESCRIPTION GOES HERE.			Edit Date	Jul 22, 2009 08:30 PM

Contractor	Invoice Information	Totals
Contractor	Invoice Number	Currency
35160810000P	5478546INV	USD
VPS ARCHITECTURE	Invoice Date	Sub Total
Address Code	15 Jul 2009	\$58,302.00
01		Retainage
Contract		\$0.00
CONTRACT999		Tax
Terms		\$0.00
		Markup
		\$0.00
		Total
		\$58,302.00

Line Items Load Contract Line Items

Sequence	Description	Contract Line	Line Group	Sub Total	Retained	Retainage Paid	Tax	Line Total
1		1		\$58,302.00	\$0.00		\$0.00	\$58,302.00

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Done Internet | Protected Mode: On 100%

If you need to make any adjustments to the line click on the line sequence 1. Make changes and refresh totals. Then click on the green done flag.

Line Item - Windows Internet Explorer

https://test.fims.indiana.edu/mms-stg/screen/PC_INVOICE_LINE_ITEM_EDIT?lineSeq=1&tran

Project Contract Invoice

FacilityMAX Hello, BRIDGET Logout About Help

Module Accounts Payable Setup Reports

Line Item View: Select

Line	1	Editor	BLGENTRY	Transaction	5004
Description	DESCRIPTION GOES HERE.			Retainage Release	No
				Verify Punch List	No
				Retainage Balance	\$0.00

Contract Line Item	Invoiced	Accepted
Contract Line	Amount	Amount
1	\$58,302.00	\$58,302.00
Line Group	Retained Amount	Retained Amount
	0.00% \$0.00	0.00% \$0.00
Project	Retainage Paid	Retainage Paid
20063544	\$0.00	\$0.00
LIBRARY 044 - BLACK FILM	Tax 1	Tax 1
	\$0.00	\$0.00
Work Order	Tax 2	Tax 2
833883	\$0.00	\$0.00
CST-LIBRARY 044 - BLACK FILM	Tax Rebate	Tax Rebate
	\$0.00	(\$0.00)
Phase	Markup	Markup
002	0.00% \$0.00	0.00% \$0.00
CONSTRUCTION - VPS	Invoiced Total	Line Total
	\$58,302.00	\$58,302.00

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Internet | Protected Mode: On 100%

Project Contract Invoice - Windows Internet Explorer
 https://test.fims.indiana.edu/mms-stg/screen/PC_INVOICE_EDIT

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Module Accounts Payable Setup Reports

Project Contract Invoice View: Select

Transaction	5004	Editor	BLGENTRY	Status	40-APP REQ
Description	DESCRIPTION GOES HERE.		Edit Date	Jul 22, 2009 09:03 PM	

Contractor	Invoice Information	Totals
Contractor	Invoice Number	Currency
35160810000P	5478546INV	USD
VPS ARCHITECTURE	Invoice Date	Sub Total
Address Code	16 Jul 2009	\$58,302.00
01		Retainage
Contract		\$0.00
CONTRACT999		Tax
Terms		\$0.00
		Markup
		\$0.00
		Total
		\$58,302.00

Line Items Load Contract Line Items

Sequence	Description	Contract Line	Line Group	Sub Total	Retained	Retainage Paid	Tax	Line Total
1		1		\$58,302.00	\$0.00	\$0.00	\$0.00	\$58,302.00

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That will take you to the project contract invoice, change your status and save.

Project Contract Invoice - Windows Internet Explorer
 https://test.fims.indiana.edu/mms-stg/screen/PC_INVOICE_VIEW/txnNo=5004

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Module Accounts Payable Setup Reports

Project Contract Invoice View: Select

Transaction	5004	Editor	BLGENTRY	Status	40-APP REQ
Description	DESCRIPTION GOES HERE.		Edit Date	Jul 22, 2009 09:03 PM	

Contractor	Invoice Information	Totals
Contractor	Invoice Number	Currency
35160810000P	5478546INV	USD
VPS ARCHITECTURE	Invoice Date	Sub Total
Address Code	Jul 16, 2009	\$58,302.00
01		Retainage
Contract		\$0.00
CONTRACT999		Tax
Terms		\$0.00
		Markup
		\$0.00
		Total
		\$58,302.00

Line Items

Sequence	Description	Contract Line	Line Group	Sub Total	Retained	Retainage Paid	Tax	Line Total
1		1		\$58,302.00	\$0.00	\$0.00	\$0.00	\$58,302.00

Record 2916 of 2918
 Done Internet | Protected Mode: On 100%