Establishing CSAs as Master Commitments

1- Click **COST MANAGEMENT** (buttons on the left)
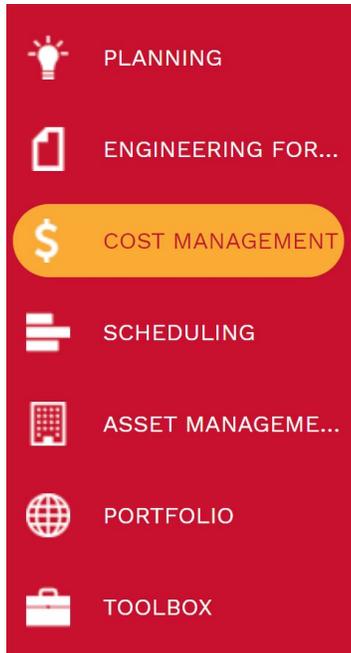
2- Under **Contracts**, Click **Master Commitments.**

3- Click on **+** in the top bar to add a new Master Commitment.

4- **Contract No.** field –Enter contract number.

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

6- **Description** field - Enter a brief descriptive explanation of the contract scope.

7- **Type** field - Select appropriate type from drop down menu.

8- **Category** field – Select from the Category drop down menu.

9- **Start Date** field – Enter contract start date.

10- **End Date** field – Enter date for expiration of the base contract (this date is to be updated as extensions are approved).

11- **Project Manager** field – Select Project Manager from drop down menu. Can start typing name.

12- **RFP-RFQ** field **–** Enter RFQ number.

13- **HB1295 - Approved** field – Enter approved date if applicable, otherwise leave blank.

14- **BOR Approved Date** field – Enter approved date if applicable, otherwise leave blank.

15- **BOR Approved Amount** field – Enter approved amount, if applicable, otherwise leave blank.

16- **NTE Amount** field – Enter the Not To Exceed amount for the contract.

17- **K Number** field – Enter the contract K number.

18- **Approved Base Cost** field – leave blank. Sums all Project Agreements approved to date.

19- **Approved Reimbursable** field – leave blank. Sums all Reimbursables approved to date.

20- **DSE Multiplier** field – Enter the negotiated DSE Multiplier

21- Click the ⊟ icon in the top header.

Contract No.*	W237500	**4**
Company	WALTER P MOORE & ASSOCIATES INC	**5**
Description	IDIQ for Civil Engineering Support	**6**
Type	Planning CSA	**7**
Category	Civil Engineering	**8**
Status / Revision	Draft	0
Start Date	04-06-2023	**9**
End Date	04-05-2026	**10**

MASTER COMMITMENT RECAP

	COSTS	DAYS
Original Value	$0.00	0
Original Commitments	$0.00	0
Approved Changes	$0.00	0
Revised Value	$0.00	0
Invoiced	$0.00	
Balance	$0.00	
Retained	$0.00	
Pending Changes	$0.00	0
Projected Value	$0.00	0
Master Balance	$0.00	0

USER DEFINED FIELDS

Project Manager	**11**	Jim Taylor (University of Houston)
RFP-RFQ	**12**	
HB1295 - Approved	**13**	
BOR Approved Date	**14**	02-24-2022
BOR Approved Amount	**15**	4,000,000.00
NTE Amount	**16**	$1,250,000.00
K Number	**17**	K-23-00850
Approved Base Cost		$0.00
Approved Reimbursable		$0.00
DSE Multiplier	**20**	2.5

22- Under the **UH FIELDS** tab at the top, select the **Dates** tab on the left and enter dates in the **DATA** column.

23- Select the **Contacts** tab on the left and enter contact information in the **DATA** column.

22

MAIN	UH FIELDS	NOTES	ATTACHMENTS (1)	WORKFLOW

Dates		
	UH FIELD	**DATA**
Contacts	Primary Contact	
	Phone	
	Email	

23

24- Under the **ATTACHMENTS** tab, add the contract and other documents by dragging to the 'Drop files here or click the Add button' section.

Drop files here or click the Add button

25- Under the **WORKFLOW** tab at the bottom, click on the **Submit** button.
26- Click on the **Save** after the page **refreshes**.

| MAIN | UH FIELDS | NOTES | ATTACHMENTS | WORKFLOW |

ACTIONS

➤ SUBMIT   →   **25**

— BUSINESS PROCESS

— WORKFLOW LOG

27- To send a copy of the executed Continuing Service Agreement to the Service Provider, select the **NOTIFICATIONS** tab and then **+Add**.

| MAIN | UH FIELDS | COMMITMENT CHANGES | COMMITMENT INVOICES | PAYMENTS | NOTES | ATTACHMENTS (4) | WORKFLOW | NOTIFICATIONS (2) |

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

Edit + Add 🗑 Delete ⟳ Refresh ▦ Layouts

ID	SUBJECT	SENT DATE	SENT TIME	SENT BY	TO COMPANY	TO CONTACT	STATUS

28- To field – Click on the ⋯icon then select Service Provider contacts. To narrow the list, type the company name in the company field and click on the three lines.

29- CC field – Click on the ⋯icon to add PM Web Users as CCs.

30- Manual CC field – Enter any e-mail address for persons not in PM Web. Include

"poctract@central.uh.edu" as a manual CC.

31- **Notification type** field – Select 'Fully Executed Contract Document' from the drop down list.

32- **Subject** field – Enter the following: "WXXXXXX [*vendor name*] CSA ([*CSA Category*]) Fully Executed Project Agreement *[Record #]*." For example, "W247007 Contractors CSA (Materials Testing) Fully Executed Project Agreement 07"

33- **Include Link** check box – Ensure this box is <u>NOT</u> checked.

34- Remaining fields can be blank/unchecked.

35- Under the 'SELECT TO ATTACH TO EMAIL' list, select the <u>Fully Executed SP Copy</u> attachment.

36- Click on the **Send** icon

						SELECT TO ATTACH TO EMAIL		
From	Nick Merry			☐System		■	TYPE	DESCRIPTION
To	**28**					☐	Report	Commitments
CC	**29**					☐	Report	Commitments SC Summary Log 2016
BCC						☐	Report	UH-Job Order
Manual CC	**30**					☐	Report	UH-Project Agreement
Subject	**32** Project Name- Commitments - 01					☐	Report	UH-Service Order
Status		▼	Due Date			☐	Attachment	PTB_Organ Recital Hall Water Intrusion Rep
Notification type	**31** Fully Executed Contract Document	▼	Reminder	☐		☐	Attachment	P92237371.UH Fine Arts Bldg. POC
Reference			Completed	☐		☐	Attachment	W237507-01 Fully Executed_FPC Copy
Include Link	☐		Completed Date			☑	Attachment	W237507-01_Fully Executed SP Copy

37- Under the '**WORKFLOW**' tab on the top bar, select Final Approve, and click the **SAVE** button.

38- Upon Final Approval, Master Commitments become available for UH users to generate commitments.