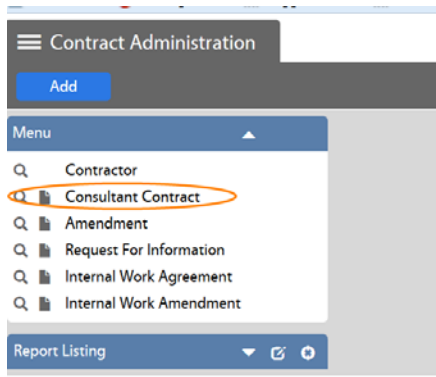


CONSULTANT CONTRACT – CM AGREEMENT

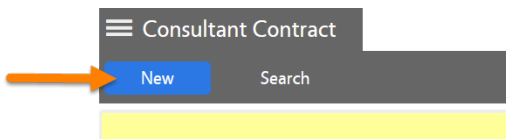
The **UPL / COORDINATOR** will initiate new agreements.

In order to create a new agreement, please follow these steps:

1. Select the **Consultant Contract** menu option.

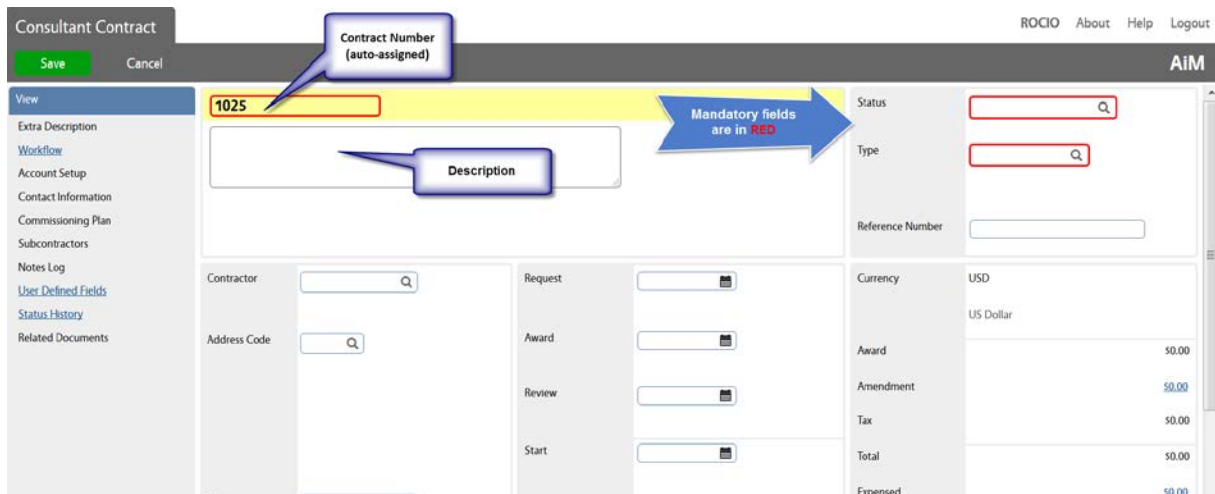


2. Create a New Consultant Contract





3. REQUESTED Workflow Status

1. Enter the following information:
 1. Description – Enter contract name and brief description. (This field contains 255 characters only.)
 2. The scope of the project should be entered into the “Extra Description” view.

A screenshot of the 'Consultant Contract' form in a software application. The form has a dark header with 'Contract Administration' and 'AIM' logos. Below the header are 'Save' and 'Cancel' buttons. The form is divided into several sections. On the left, there is a 'View' sidebar with options like 'Extra Description', 'Workflow', 'Account Setup', etc. The main form area contains fields for 'Contract Number' (with a callout 'Contract Number (auto-assigned)' pointing to the value '1025'), 'Description' (with a callout 'Description'), 'Status', 'Type', 'Reference Number', 'Currency' (set to 'USD'), 'Award' (\$0.00), 'Amendment' (\$0.00), 'Tax' (\$0.00), 'Total' (\$0.00), and 'Expensed' (\$0.00). A blue arrow points to the 'Status' and 'Type' fields with the text 'Mandatory fields are in RED'. The 'Contract Number' field is highlighted in yellow.


NOTE: The **Contract Number** will be auto-assigned by the system.

3. Request Date (Date Contract is entered into AiM)
4. Type = CM - Enter the contract type directly in the field and click on the  icon to validate the selection. Or click on the  icon for a list of contract types, and select "CM Agreement".

Consultant Contract Type

Done Search Cancel



Type ↓	Description
CM AGREEMENT	CM Agreement
QA	QA
PSC	Professional Services Contract
PSPO	PSPO

5. Capital Project – Enter the pertinent Project # or click on the  icon for a list of projects from which you can select the appropriate one by clicking on the project number in blue.

Capital Project

Done Search Reset Cancel

Capital Project	Description
06-176	Pebble Hill - Building Renovations and New Addition
09-059	M.W. Smith Hall - Roof Replacement
09-130	Hoerlein Hall (Small Animal Clinic) - Roof Replacement
09-183	Band Rehearsal Hall Facility - Phase II, Main Building
10-042	Haley Center - Building Wide, Fire Alarm & Mass Notification System Upgrades

6. Contractor and Address Code – Type in the Contractor's # or name and click on the  icon to confirm the selection. You can also retrieve a comprehensive list of Contractors by clicking on the  icon.

The Contractor's Address will be automatically populated by the system, based on the selected Contractor. However, if the Contractor has multiple addresses in the system, please select the appropriate address code/address.

Consultant Contract ROCIO About Logc

Save Cancel AiM

1024 Last Edited by On

Provide pre-construction management services

Status:

Type:
CM Agreement

Reference Number:

Capital Project:
Lem Morrison Dr - Multi-Use Pathway

Currency: USD
US Dollar

Award: \$0.00

Amendment: [\\$0.00](#)

Tax: \$0.00

Total: \$0.00

Expensed: [\\$0.00](#)

Remaining: \$0.00

Contractor:
Bailey-Harris Construction

Address Code:
1552 BAILEY HARRIS DRIVE

AUBURN
AL
36830

Terms:

Bid Amount: \$0.00

Request:

Award:

Review:

Start:

End:

7. Enter UDFs - Complete the fields under the OA Agreement section. Review any defaulted information in the fields. Click on the icon to revise the selection.

CM Agreement

Architect or Construction Mgr?

Total Comp: Fixed Amt or Rate?

Total Compensation-Fixed Amt

Total Compensation-Rate %

Project Classification

8. Attach Quote/Proposal as a related document.
You may “attach” an existing document in AiM or “add” a new document from the network or your computer.

Related Documents GREGORY About Logout

Save Cancel AIM

1012 Last Edited by On

EMC will perform a pre-renovation materials survey, removal design, and monitoring for the building project.

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
	0188 PARTS QUOTE.PDF	1.0	EMAIL		Jul 24, 2015

Attach

➔ To Attach - Search the file that you want to attach:

➔ To Add – Browse to the desired file and select it:

- a. Click on **Next** three times to bypass the sections for Meta Data, Attributes, and Permissions. The information for these options is not required.
- b. Click on **Save** on the Related Documents screen.

9. Enter Scope of Work into the Extra Description Field

10. Line Item(s)

Go to the Line Item section and click on “Add”. (There is also a Remove Icon to delete contract line items for edit purposes). Contract line items link to project components and contain the award amount to be applied as a committed cost to the component. The award amount will also roll up to the overall contract award amount.

Enter:

- a. Component Group and Component

- b. Description – The description field can accommodate up to 255 characters. This field is automatically populated with the Component’s description. But, you may change it.
 - o The Consultant Contract Line Item Screen has an Extra Description, Notes Log, and Related Documents views to capture additional information.
- c. Line Group - This field displays the line group code. The line group code is a reporting element for grouping contract line items.
- d. Click on Done, or on Add when another line item needs to be entered.
- e. Award Amount – Enter amount without a comma.
- f. Tax and Tax Rebate if applicable.
- g. Click on **Done**, or **Add** if another line item needs to be entered.

The screenshot displays the 'Line Item' screen in the AiM system. At the top, there are navigation buttons: 'Done', 'Add', and 'Cancel'. The user is logged in as 'ROCIO'.

The main form area shows the following details for line item 003:

- Contract:** 1012
- Line Group:** ADDTL SVCS
- Description:** AE ADDITIONAL SERVICES
- Capital Project:** 10-155 Hill Residence Halls - Building
- Component Group:** DESIGN
- Component:** AE ADDITIONAL SERVICE
- Total Budget:** \$0.00
- Remaining:** \$0.00
- Award:** 5000
- Amendment:** \$0.00
- Tax 1:** \$0.00
- Tax 2:** \$0.00
- Tax Rebate:** \$0.00
- Line Total:** \$0.00
- Expensed:** \$0.00
- Remaining:** \$0.00

A sidebar on the left provides navigation options: View, Extra Description, Account Setup, Notes Log, and Related Documents.

Consultant Contract ROCIO About Logos

Save Cancel AIM

[User Defined Fields](#)

[Status History](#)

[Related Documents](#)

Contractor: ENVIR MATERIAL

Address Code: 001

20247 CHESTNUT STREET

MONTGOMERY

AL

36106

Terms:

Bid Amount: \$0.00

Request: Jul 24, 2015

Award:

Review:

Start:

End:

Currency: USD

US Dollar

Award	\$9,001.00
Amendment	\$0.00
Tax	\$0.00
Total	\$9,001.00
Expensed	\$0.00
Remaining	\$9,001.00

Line	Description	Line Group	Component	Total	Expensed	Remaining
001	AE DESIGN DEVELOPMENT	BASIC SVCS	AE DESIGN DEVELOPMENT	\$1,001.00	\$0.00	\$1,001.00
002	AE BASIC FEE SUMMARY	BASIC SVCS	AE BASIC FEE SUMMARY	\$3,000.00	\$0.00	\$3,000.00
003	AE ADDITIONAL SERVICES	ADDTL SVCS	AE ADDITIONAL SERVICES	\$5,000.00	\$0.00	\$5,000.00

11. Click on **Save**.

12. Print the AU CM Contract

a. Click on **Print**

Consultant Contract

Edit New Search

Action

ViewFinder: 1012

Email

Print

View

Extra Description

Workflow

Account Setup

Contractor

b. Select the "AU PSC Contract" from the list of available reports.

☰ Consultant Contract

← Back

- [709-CONSULTANT CONTRACT](#)
- [759-CONSULT CTR WKF SUM](#)
- [760-CONSULT CTR WKF DET](#)
- [AU Consultant Contract OA](#)
- [AU Consultant Contract CM](#)
- [AU Consult Contract PSPO](#)
- [AU PSC Contract](#)

The system will generate your report (normally on a new tab, depending on your web browser settings).

August 2001
Revised by AU on April 13, 2011
AU Modified for CM

(1) **B.C. Project No. 10-155**

**AGREEMENT BETWEEN OWNER AND
CONSTRUCTION MANAGER (CM)**

* Supplemented by AU/CM (July 2005, Revised by AU on December 7, 2009), Standard Articles of the
Agreement between Owner and Construction Manager *

(2) **DATE of this AGREEMENT:**

(3) **The OWNER(s):**
 Auburn University
 c/o Facilities Management
 West Samford Avenue
 Auburn University, AL 36849-5514
 Phone: 334/844-9450
 Fax: 334/844-9452

(4) **The ARCHITECT CONSTRUCTION MANAGER**
 Bailey-Harris Construction Company Inc.
 Attn: 1
 1552 Bailey Harris Drive

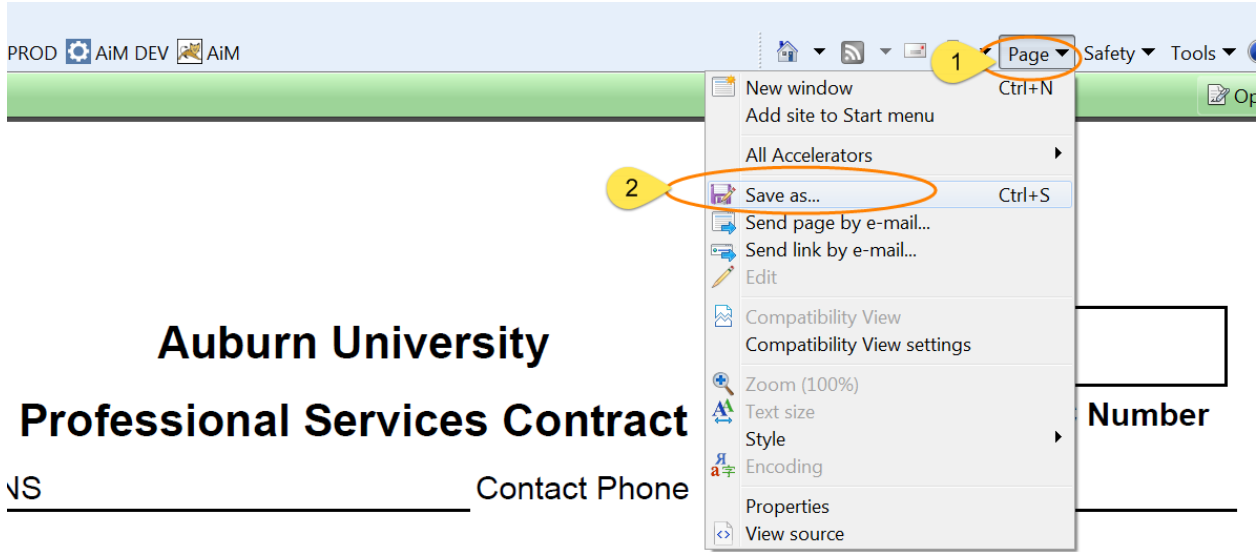
 Auburn, AL 36830
FEIN:

(5) **The PROJECT:** *(Insert full description of Project, Location, Address, and Scope)*
 Project Name: Provide pre-construction management services
 AU Project No. 10-155

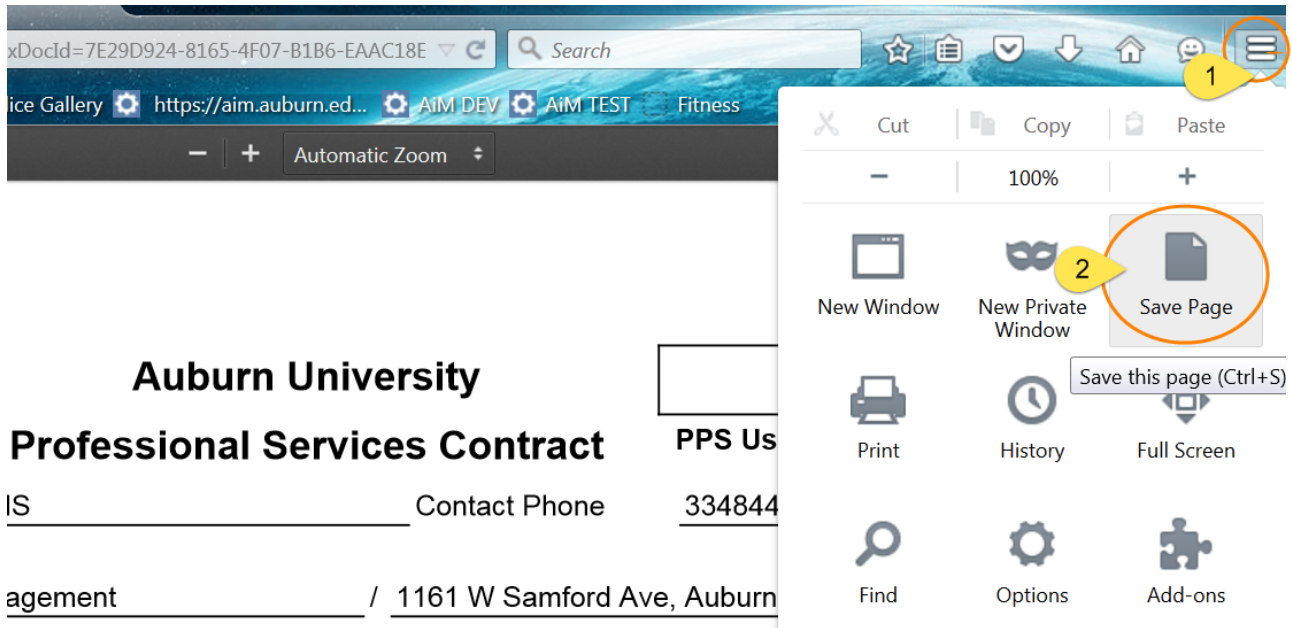
13. Save the agreement as a PDF file in the network folder with the related project documentation.

The steps to save the file may vary depending on your web browser. Here are two examples:

Explorer:

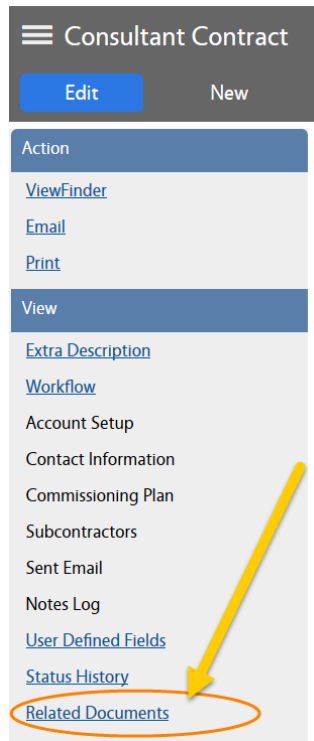


Mozilla Firefox:

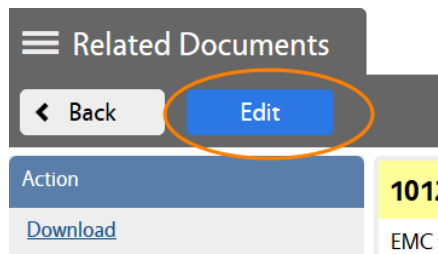


14. Attach the Agreement PDF file as a “Related Document” to the AiM Contract.

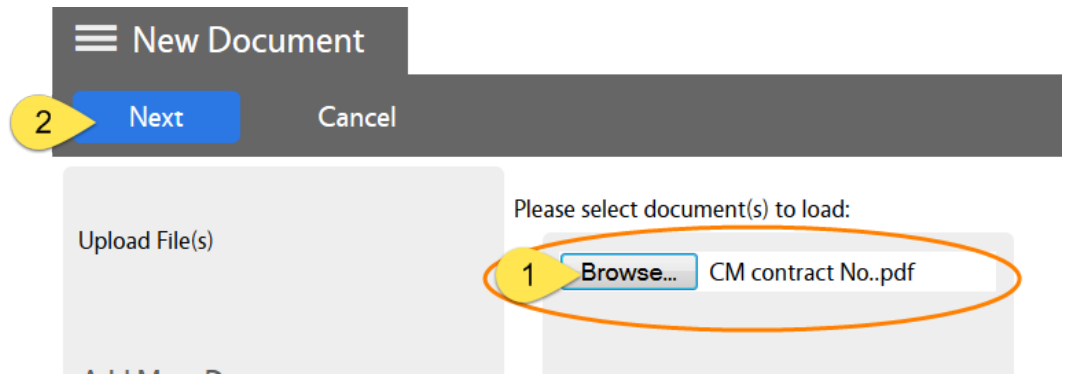
- a. From the main Consultant Contract screen, go to the “**Related Documents**” view:



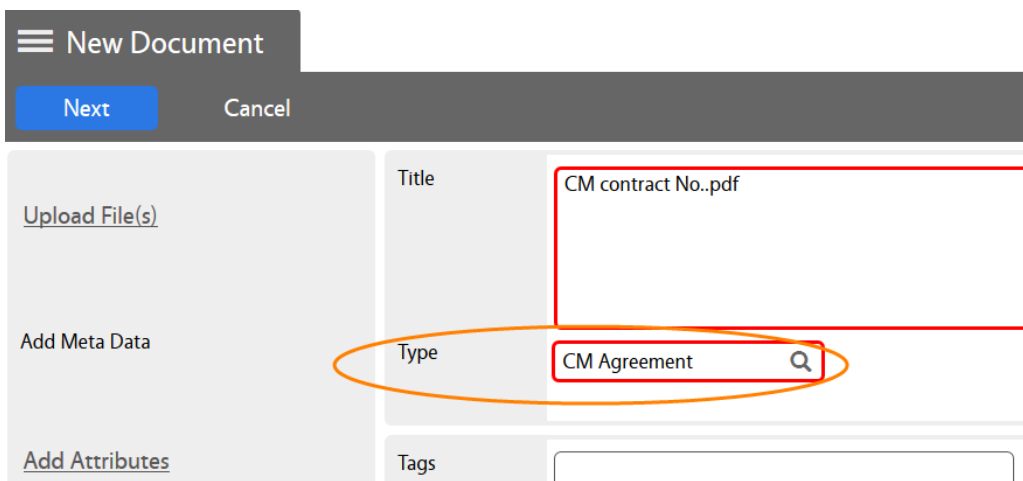
- b. On the Related Documents view, click on **Edit**



- c. Click on **Add**
d. Browse the agreement PDF file and click on **Next**

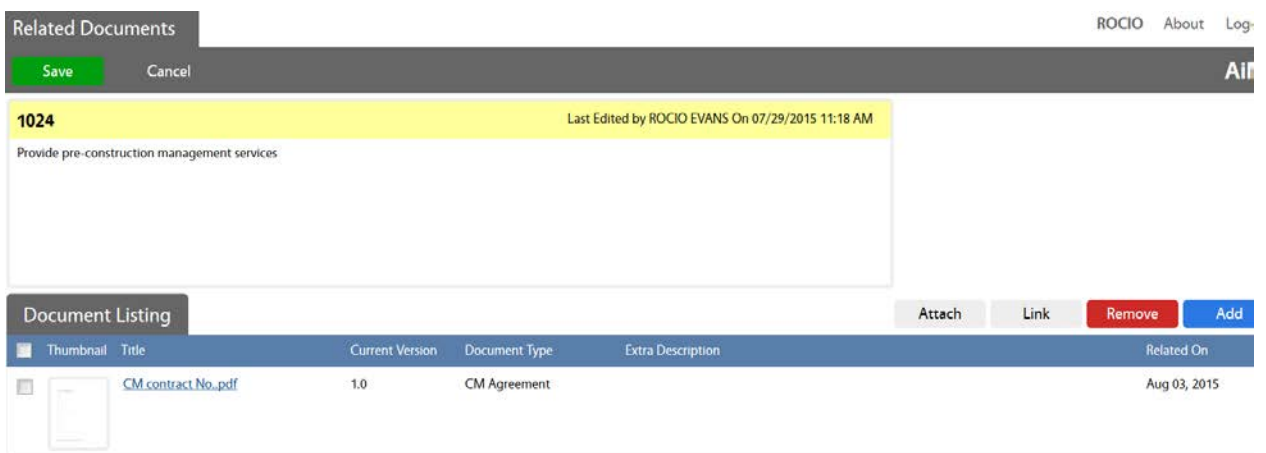


e. Enter the Document Type. In this case "CM Agreement":

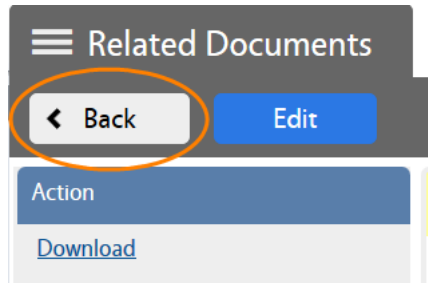


f. Click on **Next** three times to bypass meta data and permissions options.

g. Click on **Save** on the Related Documents screen.

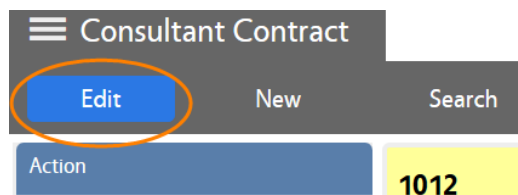


h. Click on **Back** (or on Edit if you want to revise anything).



15. Change the Status to “**PRJ SUPPORT REVIEW**” in order to send the agreement to the Contract Specialist for Review.

a. Click on **Edit**



16. Once all the necessary information has been entered, change the Status to **PRJ SUPPORT REVIEW**.

17. Click on **Save**.

CONTRACT STARTS ROUTING IN THE SYSTEM