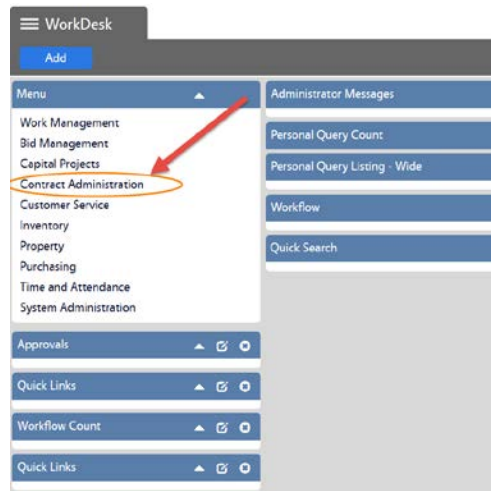


CONSULTANT CONTRACT: OA AGREEMENT

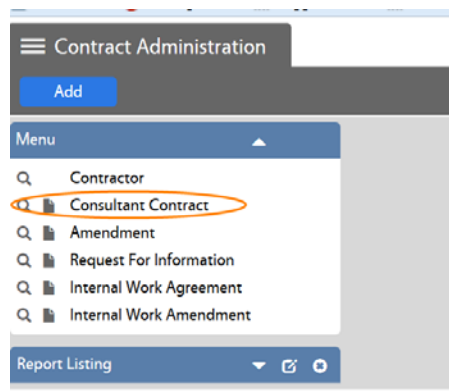
The **UPL / COORDINATOR** will initiate new agreements.

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

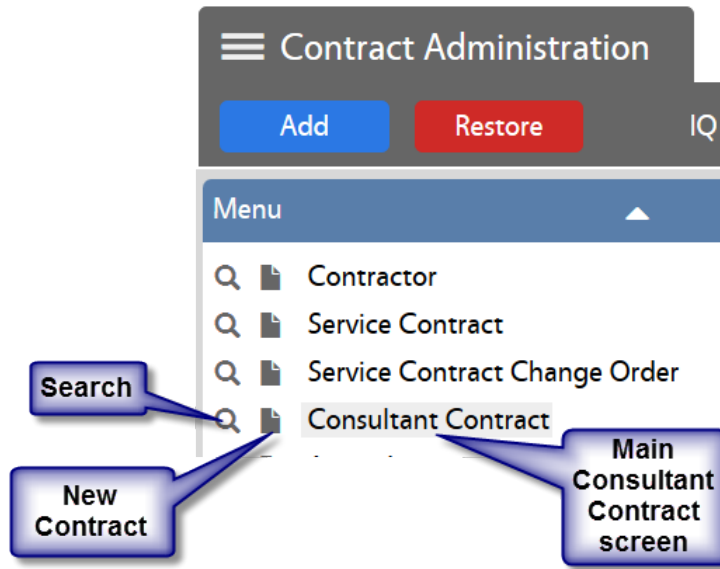
1. Log into the AiM system, and go to the **Contract Administration** screen from the main Menu.



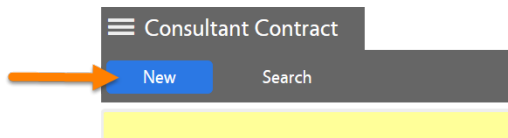
2. Select the **Consultant Contract** menu option.



NOTE: From this screen you can Search, create a New Contract, or open the Contract main screen:



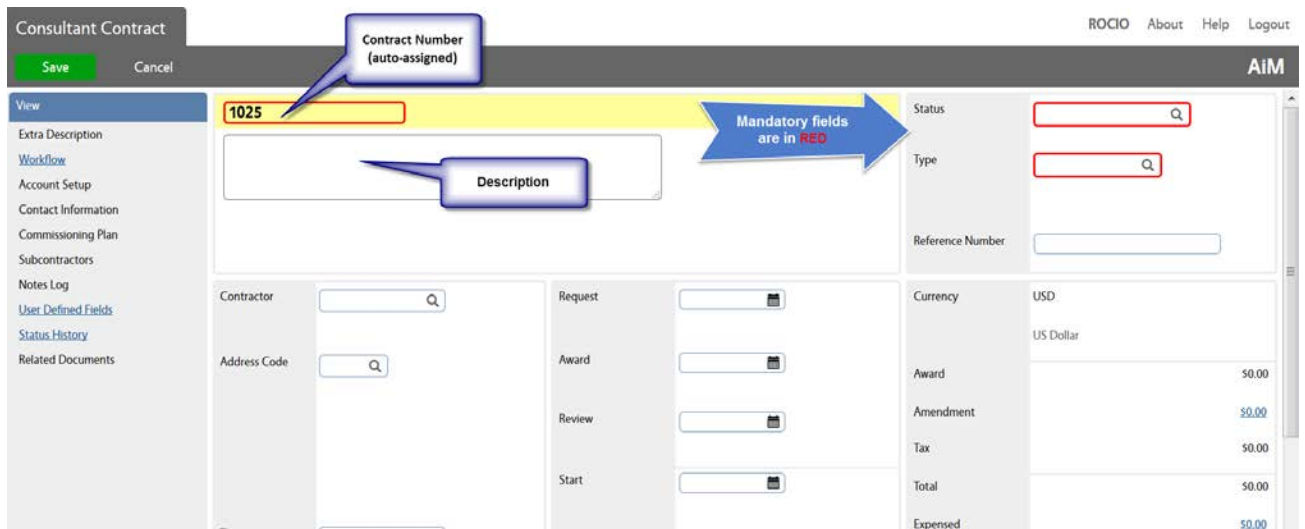
3. Create a New Consultant Contract





REQUESTED Workflow Status

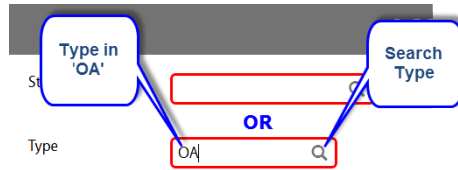
4. Enter the following information:


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.





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

3. Request Date (Date Contract is entered into AiM)
4. Type = OA - 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 OA.



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	
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 Logout

Save Cancel AiM

View

- Extra Description
- [Workflow](#)
- Account Setup
- Contact Information
- Commissioning Plan
- Subcontractors
- Notes Log
- [User Defined Fields](#)
- [Status History](#)
- Related Documents

1022

Last Edited by On

New OA Contract

Contractor

Associated Mechanical

Address Code

248 S. LEWIS STREET

MONTGOMERY

AL

36107

Terms

Bid Amount 50.00

Request

Award

Review

Start

End

Status

Type

Reference Number

Capital Project

Hill Residence Halls - Building

Currency USD

US Dollar

Award	\$0.00
Amendment	50.00
Tax	\$0.00
Total	\$0.00
Expensed	50.00
Remaining	\$0.00

7. Enter UDFs - Complete the fields under the OA Agreement section.

User Defined Fields Done Cancel

New OA Contract

OA Agreement

Architect or Engineer?

Tentative or Fixed?

Budgeted Cost of Work

Basic Fee Amount

Basic Fee Percentage

Project Classification

Basic Fee Determination

Major Renovation Percentage

Max Delay Months ex. SIX (6)

Program Verification (in days)

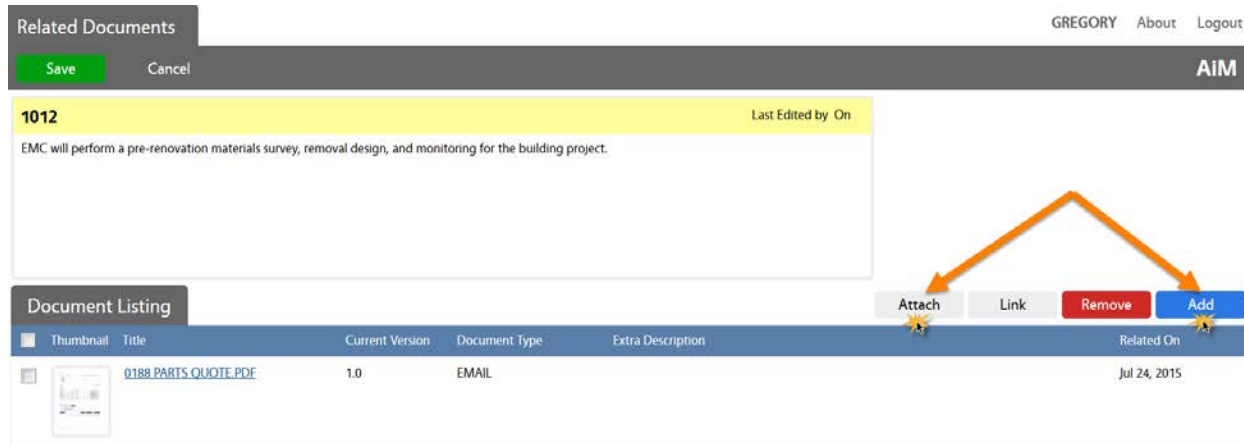
Schematic Drawings (in Days)

Preliminary Drawings (in Days)

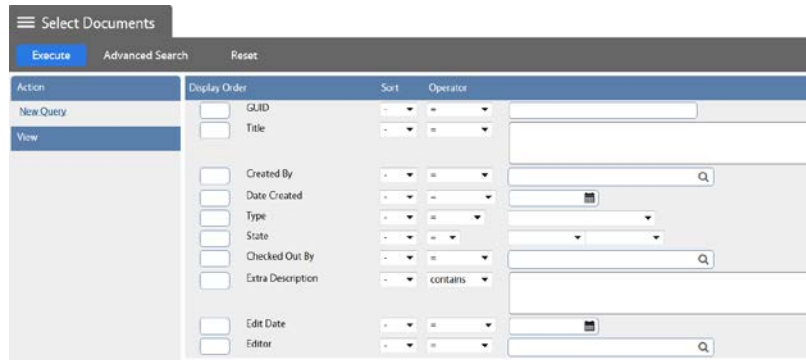
Final Drawings (in Days)

8. Attach Quote/Proposal as a related document

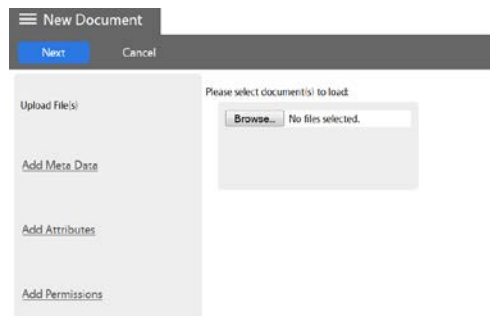
You may “attach” an existing document in AiM or “add” a new document from the network or your computer.



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



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



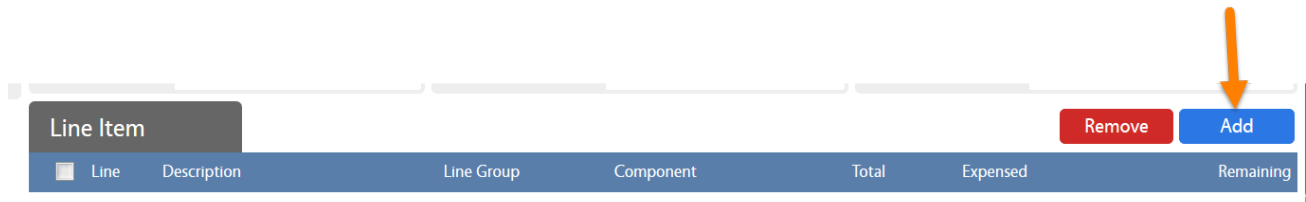
- a. Click on **Next** three times to bypass the sections for Meta Data, Attributes, and Permissions. The information for these options is not required.
- b. Click on **Save** on the Related Documents screen.

9. Enter Scope of Work into the Extra Description Field.

10. Line Item(s)

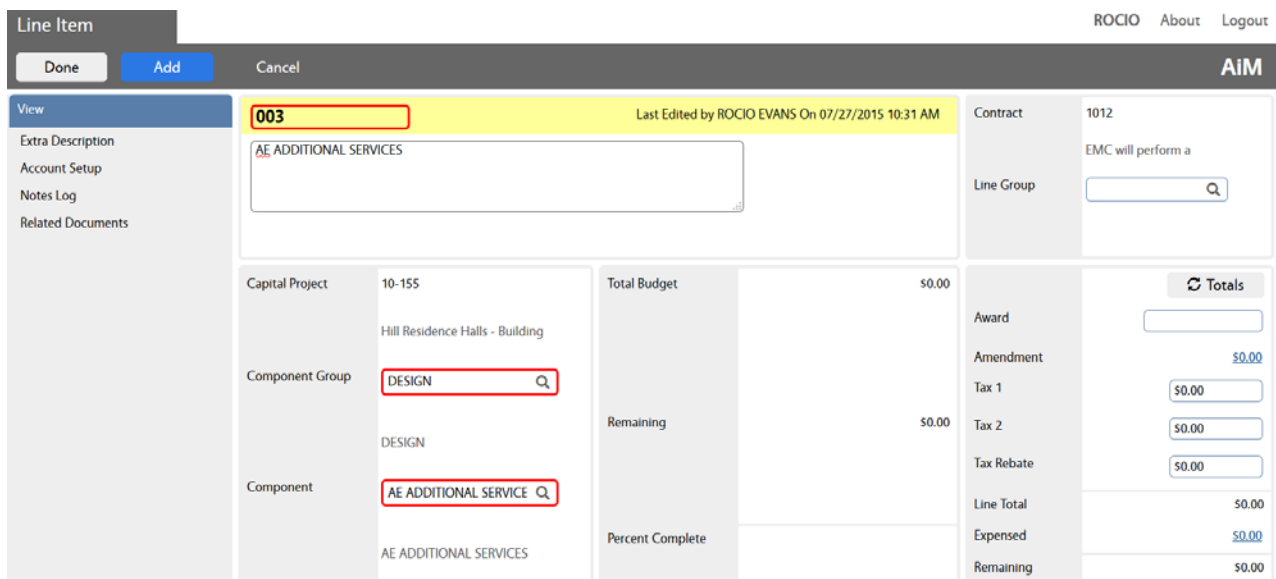
Go to the Line Item section and click on “**Add**”. (There is also a Remove icon to delete contract line items for edit purposes). Contract

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.
 - i. 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. Award Amount – Enter amount without a comma.
- e. Tax and Tax Rebate, if applicable.
- f. Click on **Done**, or **Add** if another line item needs to be entered.



Consultant Contract ROCIO About Logos

Save Cancel **AIM**

User Defined Fields
Status History
Related Documents

Contractor: ENVIR MATERIAL
ENVIRONMENTAL- 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 Consultant Contract OA"

a. Click on **Print**

Consultant Contract

Edit New Search

Action

[ViewFinder](#)

[Email](#)

Print

View

[Extra Description](#)

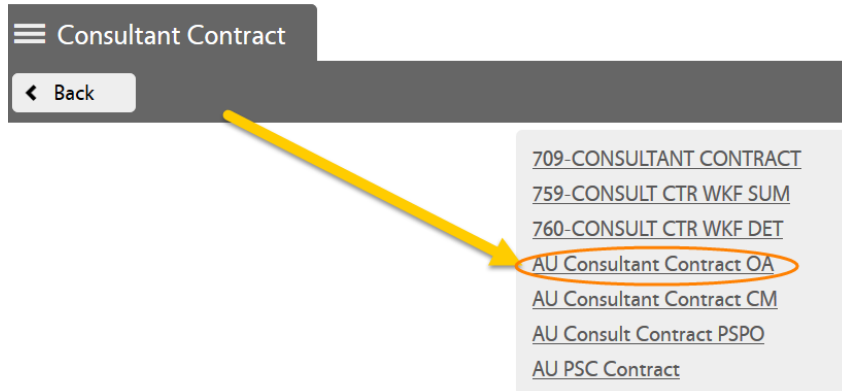
[Workflow](#)

Account Setup

1012
EMC will perform

Contractor

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



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

ABC Form B-2
August 2001
Revised by AU January 1, 2012

(1) B.C. Project No. 10-155 *To be completed using ABC Form B-3, "Checklist for Preparation of Agreement Between Owner and Architect"*

AGREEMENT BETWEEN OWNER AND ARCHITECT

Supplemented by ABC Form B-2A (August 2001), Standard Articles of the Agreement between Owner and Architect

(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** **ENGINEER** (substitute "Engineer" for "Architect" hereinafter)
 Associated Mechanical Contractors Inc
 Attn: 1
 248 S. LEWIS STREET

 MONTGOMERY, AL 36107
FEIN:

(5) **The PROJECT:** *(Insert full description of Project, Location, Address, and Scope)*
 Project Name: Testing OA Agreement for Project #10-155
 AU Project No. 10-155
 Scope:
 Auburn University, AL 36849-5514

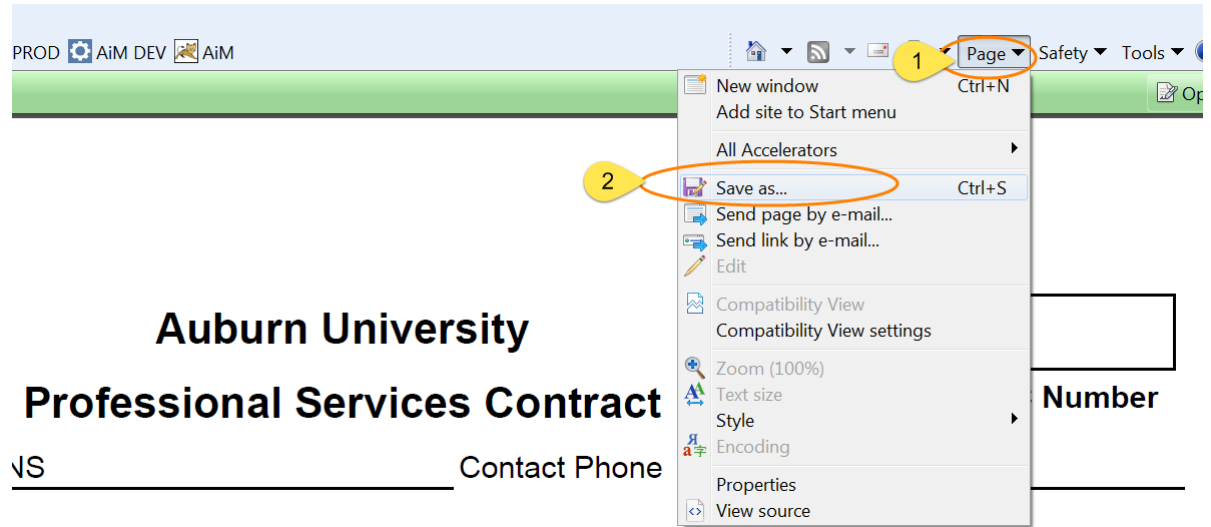
(6) **BUDGET** The Tentative Fixed amount budgeted by the Owner for the Cost of the Work is 0.

BASIC SERVICES: Unless otherwise provided in Special Provisions, the Architect shall render Basic Services A, B, C, D, and E for the above described Project in accordance with the "Standard Articles of the Agreement Between Owner and Architect".

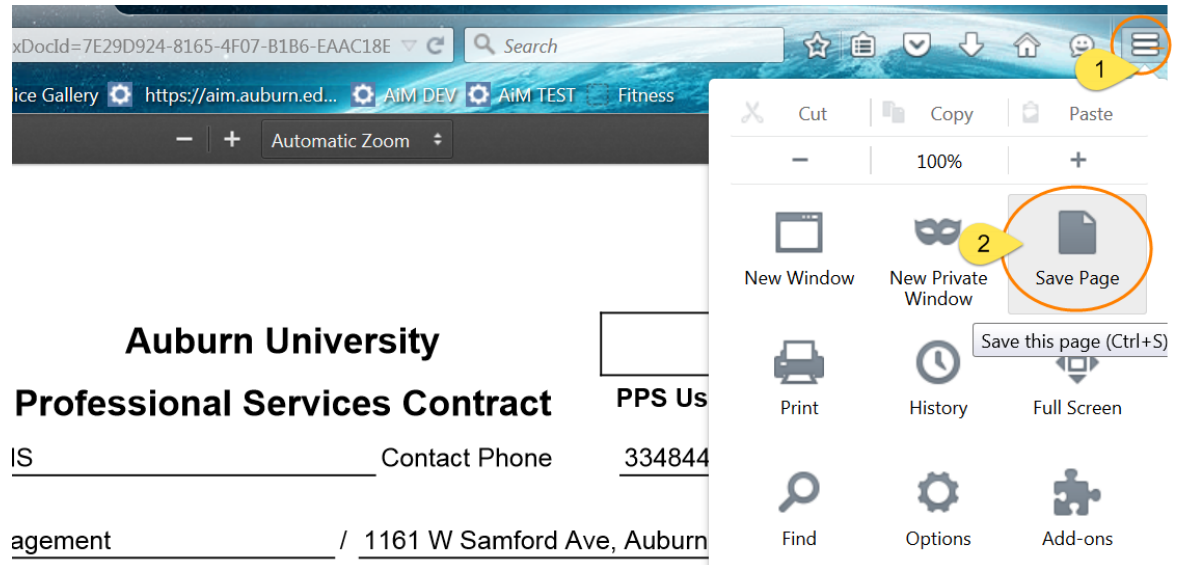
(7) **BASIC FEE** The Basic Fee to be paid the Architect shall be:

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:

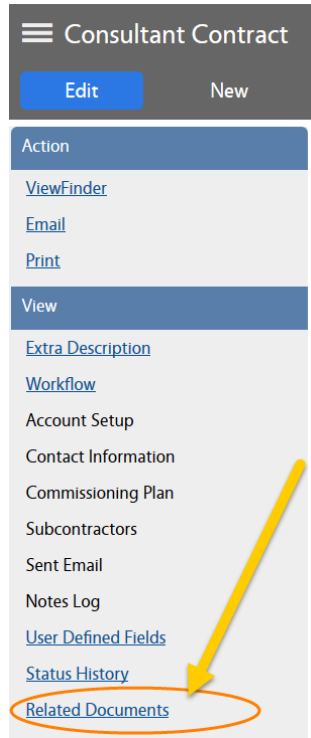


Mozilla Firefox:

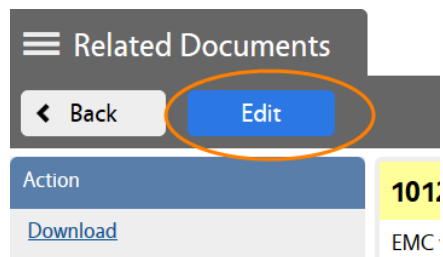


14. Attach the Agreement PDF file as a “Related Document” to the AiM Contract.

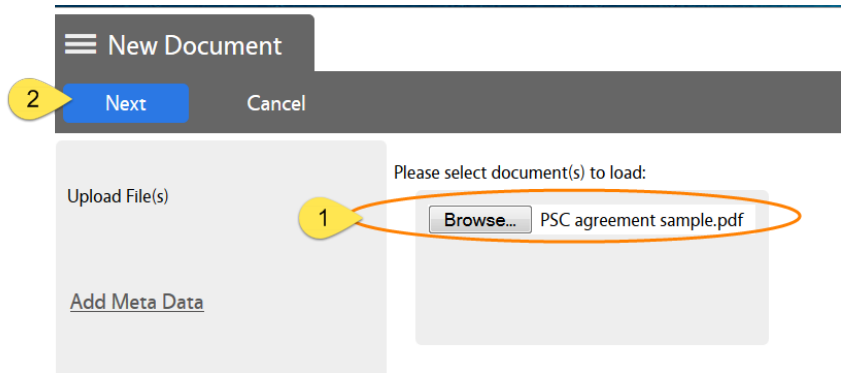
- a. From the main Consultant Contract screen, go to the “**Related Documents**” view:



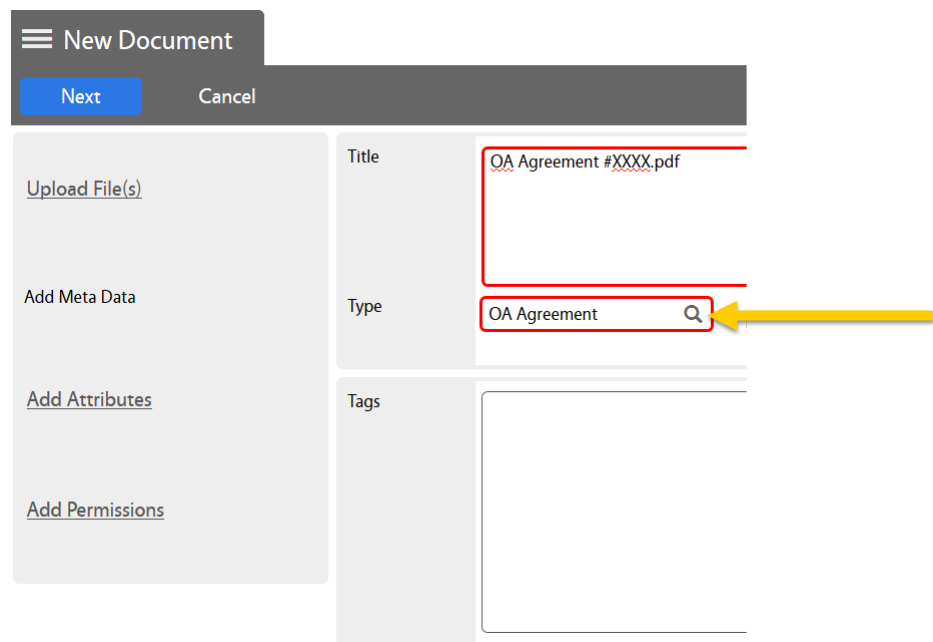
- b. On the Related Documents view, click on **Edit**



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



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



- f. Click on **Next** three times to bypass meta data and permissions options.
- g. Click on **Save** on the Related Documents screen.

Related Documents ROCIO About Logout

Save Cancel AIM

1012 Last Edited by ROCIO EVANS On 08/03/2015 09:12 AM

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

Document Listing Attach Link Remove Add

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
	PSC_agreement_sample.pdf	1.0	PSC Agreement		Aug 03, 2015
	0189_EST.PDF	1.0	AIM-DOCUMENT		Jul 24, 2015

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

☰ Related Documents

< Back Edit

Action

[Download](#)

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

a. Click on **Edit**

☰ Consultant Contract

Edit New Search

Action **1012**

Consultant Contract Status	
Status	Description
REQUESTED	Requested
PRJ SUPPORT REVIEW	Project Support Review
AD REVIEW	Assistant Director Review
DIR DESIGN REVIEW	Director Design Review
CONSULTANT REVIEW	Consultant Review
CONSULTANT REV BOT	Consultant Review for BOT Project Type
EXEC DIR REVIEW	Executive Director Review
UNIV ARCH REVIEW	University Architect Review
CONTR SIGNATURES	Awaiting Contract Signatures
PREP REQUISITION	Prepare Requisition

AiM

Status	<input style="width: 80%;" type="text" value="PRJ SUPPORT REVIEW"/> <input style="width: 15px;" type="button" value="Q"/>
Type	OA
Reference Number	<input style="width: 100%;" type="text"/>
Capital Project	<input style="width: 80%;" type="text" value="10-155"/> <input style="width: 15px;" type="button" value="Q"/>
Hill Residence Halls - Building	

16. Click on **Save**

CONTRACT STARTS ROUTING IN THE SYSTEM