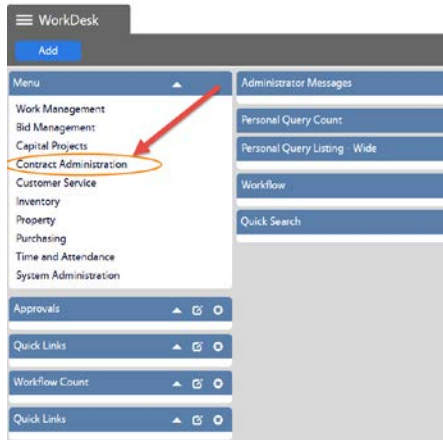


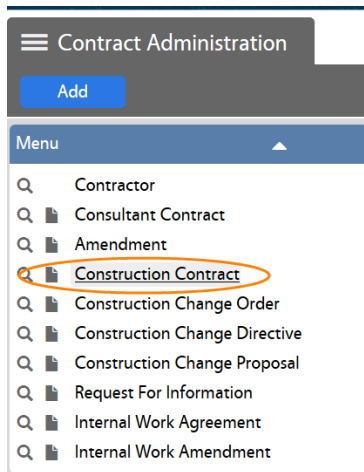
The **UPL / COORDINATOR** will initiate new agreements.

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 **Construction Contract** menu option from the Contract Administration screen.



3. Create a New Construction Contract

1. Select New Construction Contract



OR





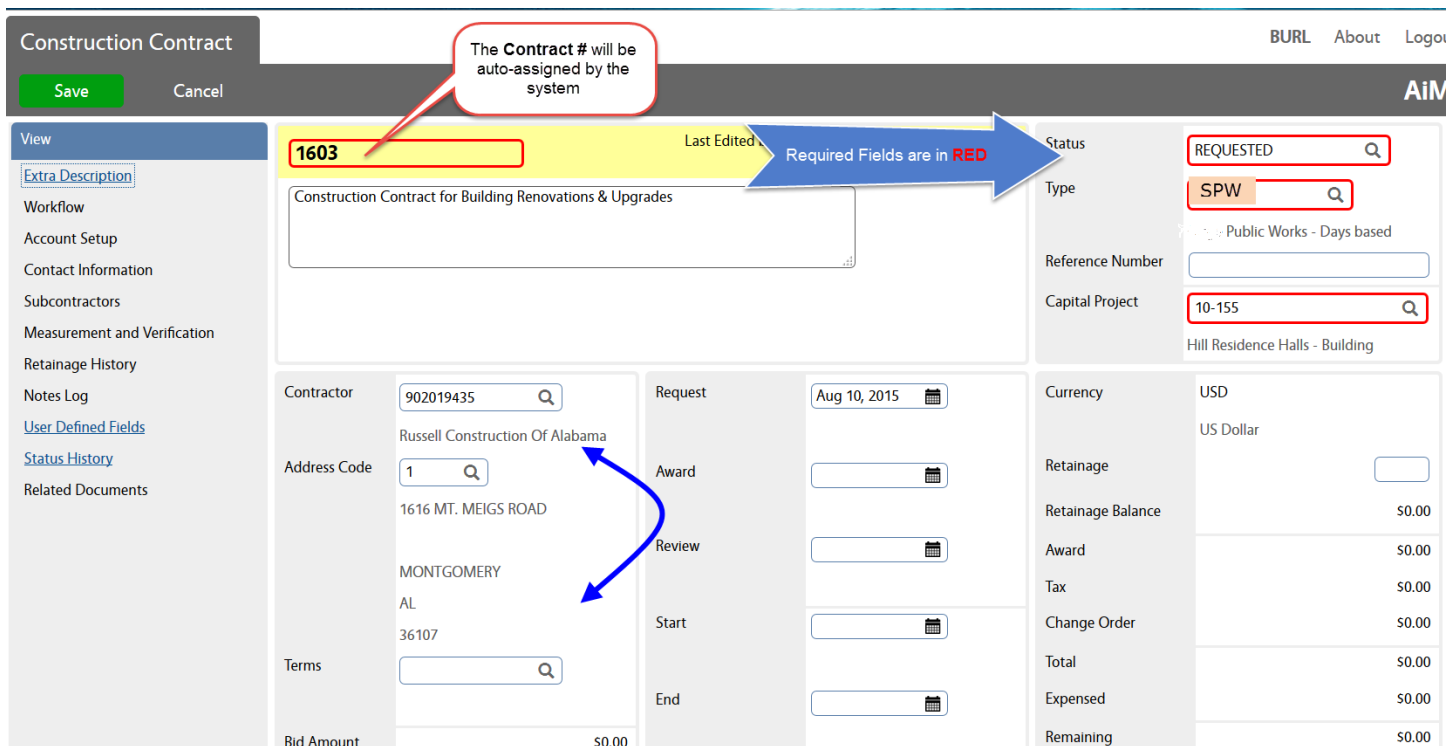
The initial status will show as REQUESTED

2. Enter the following information:


- a) Description – Enter contract name and brief description. (This field contains 255 characters only.)
- b) Scope - The Scope of the project should be entered into the “**Extra Description**” view.

**NOTE:** The **Contract Number** will be generated automatically by the system.



- c) Request Date (Date Contract is entered into AiM)
- d) Type: **SPW** – 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 SPW.



The screenshot shows the AiM Construction Contract form. The contract number '1603' is highlighted in a red box with a callout stating 'The Contract # will be auto-assigned by the system'. The 'Type' field is set to 'SPW' and is highlighted in red, with a blue arrow pointing to it from the text 'Required Fields are in RED'. The 'Capital Project' field is set to '10-155' and is also highlighted in red. The form includes fields for Contractor (Russell Construction Of Alabama), Address Code (1), Request Date (Aug 10, 2015), and Bid Amount (50.00). The Status is set to 'REQUESTED' and the Currency is 'USD'. The Retainage section shows a balance of \$0.00. The form also includes a 'Save' button and a 'Cancel' button.

- e) 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
<a href="#">06-176</a>	Pebble Hill - Building Renovations and New Addition
<a href="#">09-059</a>	M.W. Smith Hall - Roof Replacement
<a href="#">09-130</a>	Hoerlein Hall (Small Animal Clinic) - Roof Replacement
<a href="#">09-183</a>	Band Rehearsal Hall Facility - Phase II, Main Building
<a href="#">10-042</a>	Haley Center - Building Wide, Fire Alarm & Mass Notification System Upgrades

- f) 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 .

If there is a single Contractor’s Address, it will be automatically populated by the system. If the Contractor has multiple addresses, select the appropriate address code/address.

- g) Enter User Defined Fields (UDFs) - Complete the fields under the “**SPW Section**”:

**User Defined Fields**

[← Back](#)

---

\*\*\* LPW Section \*\*\*

Contract Documents are dated:

Addenda

Architect Name

Architect Address

Liquidated Damage Amount

Contract Time (Calendar Days)

Contractor's License No.

Contractor's Bid Limit

Contractor's Classification

SURETY - Name

SURETY - Principal Address

SURETY - Phone No.

**\*\*\* SPW Section \*\*\***

Request for Bids dated:

Addenda, if any:

Bid Date:

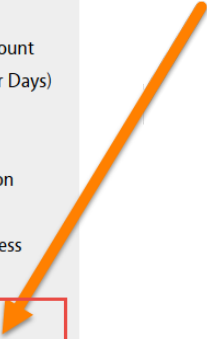
Accepted Alternates, if any:

General Provisions dated:

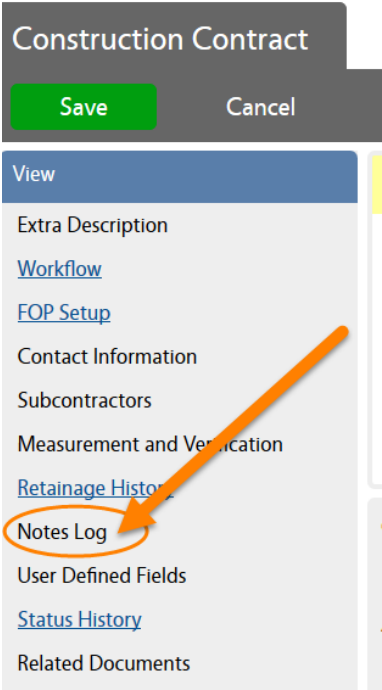
Calendar Days - Perform. Time

Requisition Number

Requisition Date

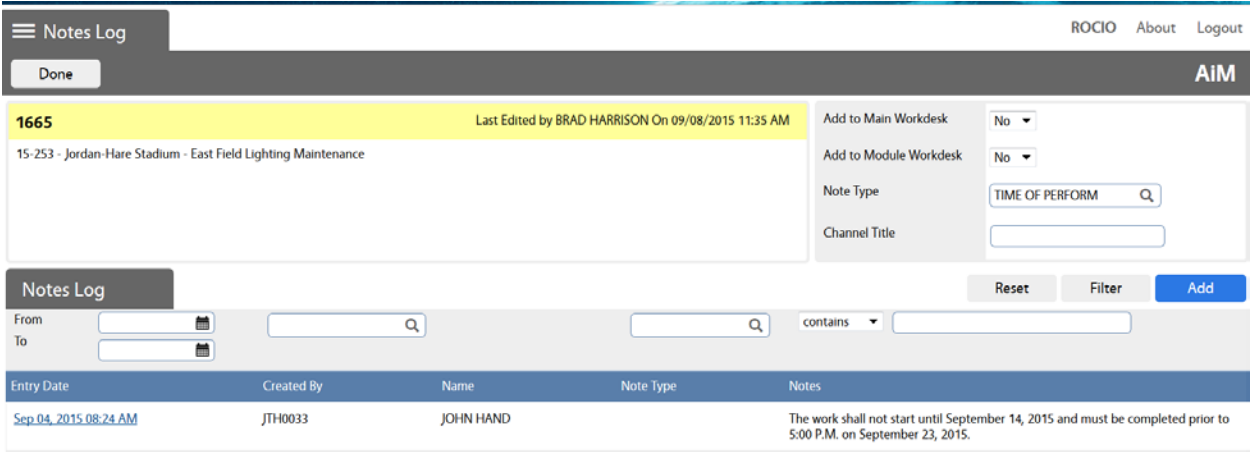


h) Notes Log – TIME OF PERFORMANCE: If in addition to the number of calendar days, indicated in the UDF field “Calendar Days – Perform. Time”, you need the contract to print specific dates or a period, or any other additional information, regarding the time of performance (Article 3 - section 3 of the contract), then you will have to use the Notes Log...



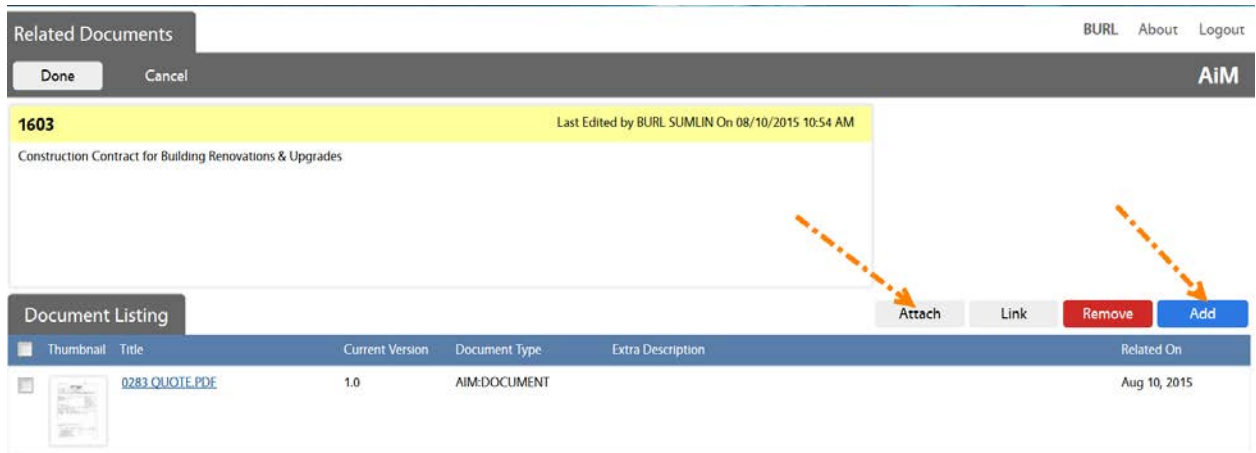
NOTE: The contract has to be on Edit mode.

- Click on Notes Log
- Click on the Add blue button
- enter the information and Select the note type “**TIME OF PERFORM**”
- Click on SAVE
- finally click on Done

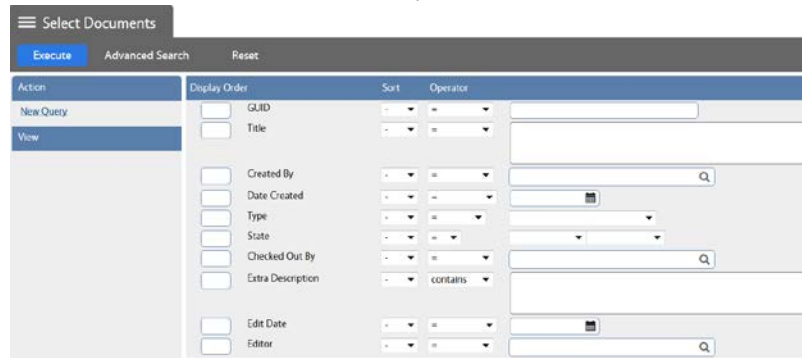


i) Attach Quote/Proposal as a related document

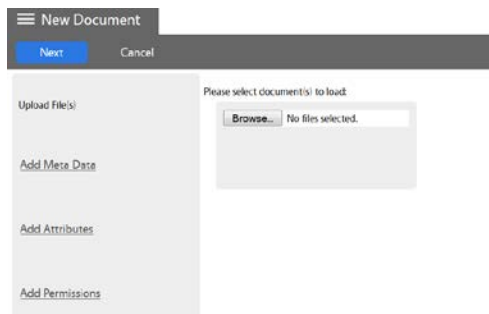
You may “attach” an existing document in AiM or “add” a new document from the network/ computer.



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



➤ To Add – Browse to the file and select it:



1) Click on **Next** three times to bypass the sections for Meta Data, Attributes, and Permissions. The information for these options is not required.

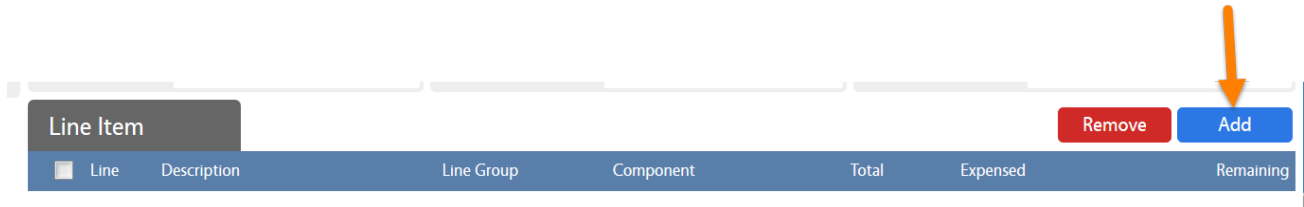
2) Click on **Save** on the Related Documents screen.

j) Enter Scope of Work into the Extra Description Field

### 3. Line Item(s)

Go to the **Line Items** 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:

4. Component Group and Component
5. 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.
  - The Consultant Contract Line Item Screen has an Extra Description, Notes Log, and Related Documents views to capture additional information.
6. Line Group - This field displays the line group code. The line group code is a reporting element for grouping contract line items.
7. Award Amount – Enter amount without a comma.
8. Tax and Tax Rebate, if applicable.
9. Click on **Done**, or **Add** if another line item needs to be entered.

The screenshot shows the full 'Line Item' form. At the top, there are 'Done', 'Add', and 'Cancel' buttons. The form is divided into several sections:

- Line Number:** 001 (highlighted in yellow)
- Description:** SITE - SITE WORK
- Component Group:** CONSTRUCTION
- Component:** SITE - SITE WORK
- Budget Summary:**

Total Budget	50.00
Remaining	50.00
Percent Complete	
Retainage	0.00%
Retainage Balance	50.00
- Contract Information:**
  - Contract: 1605
  - Line Group: CONVERT
  - Retainage Setting: No Retain/Release All
- Totals:**

Award	25000
Tax 1	
Tax 2	
Tax Rebate	
Change Order	\$0.00
Line Total	\$25,000.00
Expensed	\$0.00
Remaining	\$25,000.00

Construction Contract BURL About Logout

[Edit](#) [New](#) [Search](#) [Browse](#) AiM

[Extra Description](#)

[Workflow](#)

[Account Setup](#)

[Contact Information](#)

[Subcontractors](#)

[Measurement and Verification](#)

[Retainage History](#)

[Sent Email](#)

[Notes Log](#)

[User Defined Fields](#)

[Status History](#)

[Related Documents](#)

Contractor	902019435	Request	Aug 10, 2015	Capital Project	10-155
Address Code	1	Award		Currency	USD
Terms		Review		Retainage	
Bid Amount	\$0.00	Start		Retainage Balance	\$0.00
		End Date		Award	\$53,000.00
				Tax	\$0.00
				Change Order	\$0.00
				Total	\$53,000.00
				Expensed	\$0.00
				Remaining	\$53,000.00

Hill Residence Halls - Building

US Dollar

**Line Items** [Remove](#) [Add](#)

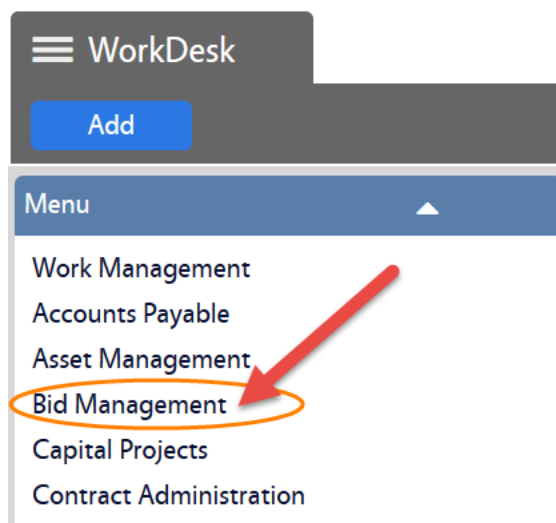
Line	Description	Line Group	Component	Total	Expensed	Remaining
001	SITE - SITE WORK - Test RE		SITE - SITE WORK	\$53,000.00	\$0.00	\$53,000.00

4. Click on **Save**

5. Before you print the agreement, you will have to activate the bidding components:

Activate Bidding:

- i. Go to the main AiM WorkDesk screen
- ii. Select the “**Bid Management**” option from the main menu:

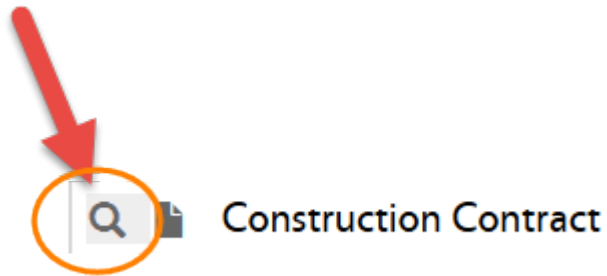


- iii. Select the **Bid Proposal** option
- iv. (TBD)

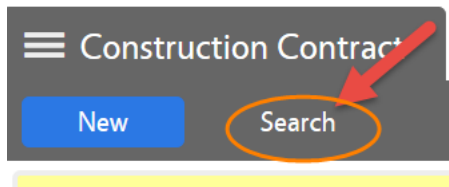
6. Click on **Save**

7. Go back to the main AiM WorkDesk screen → Contract Administration → Construction Contract, and search for the SPW agreement that needs to be printed

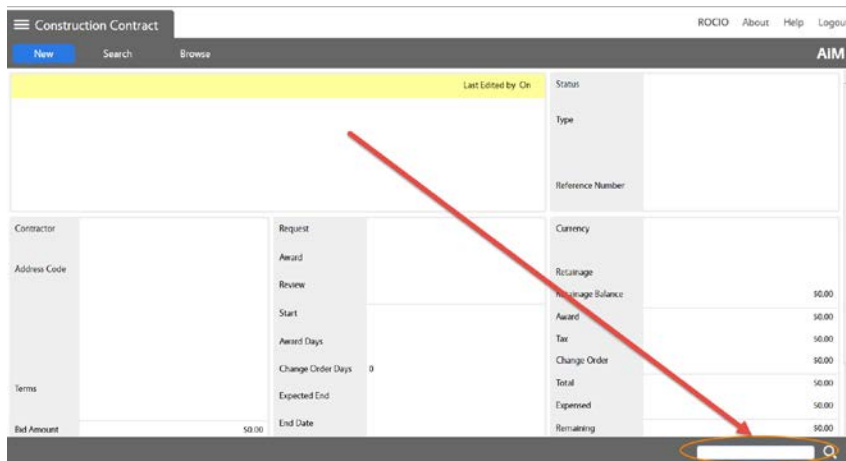
Remember that you can search from here:



OR



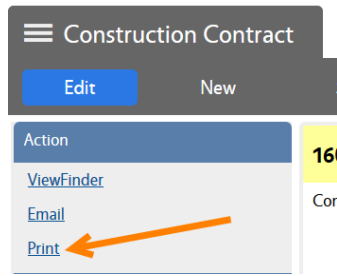
OR



8. Once you open the agreement, print the “AU Construction Contract SPW”

- a) Click on **Print**





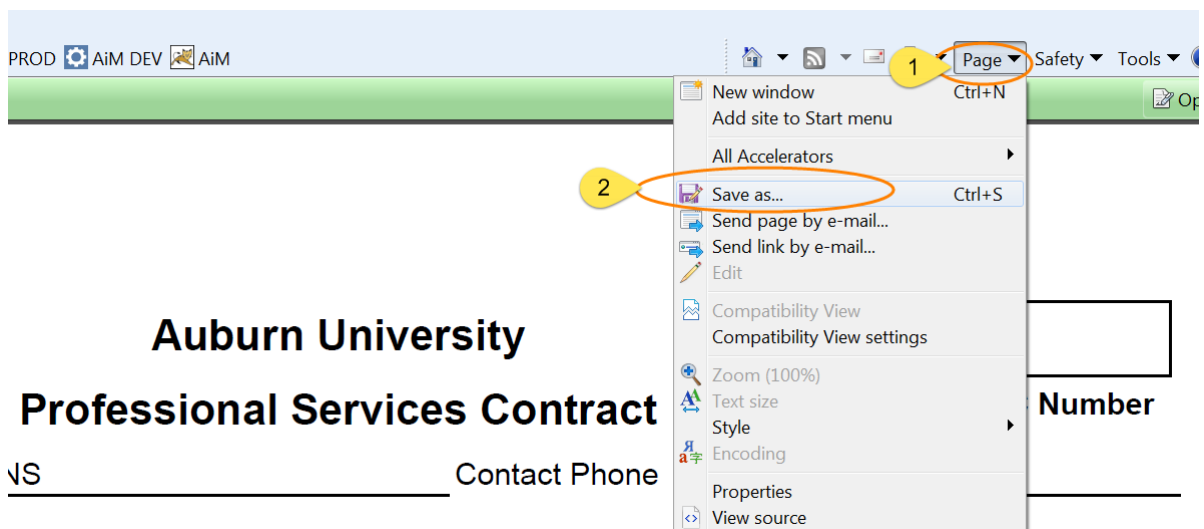
b) Select the contract named “AU Constr Contract SPW”



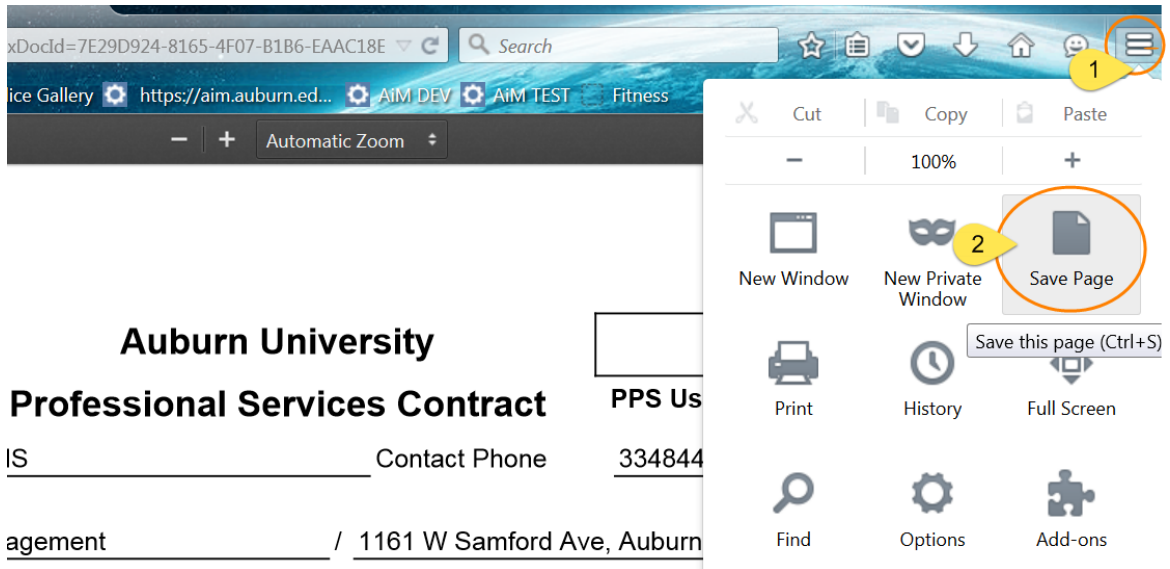
9. Save the agreement as a PDF file in the network folder with the related project documentation.

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

### Explorer:



### Mozilla Firefox:



10. Go back to the contract

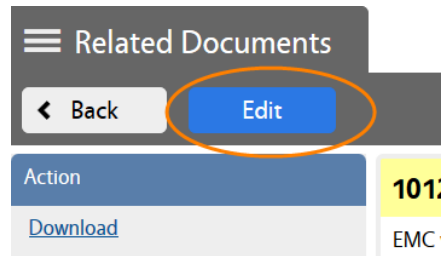


11. Attach the Agreement PDF file as a "Related Document" to the AiM Contract.

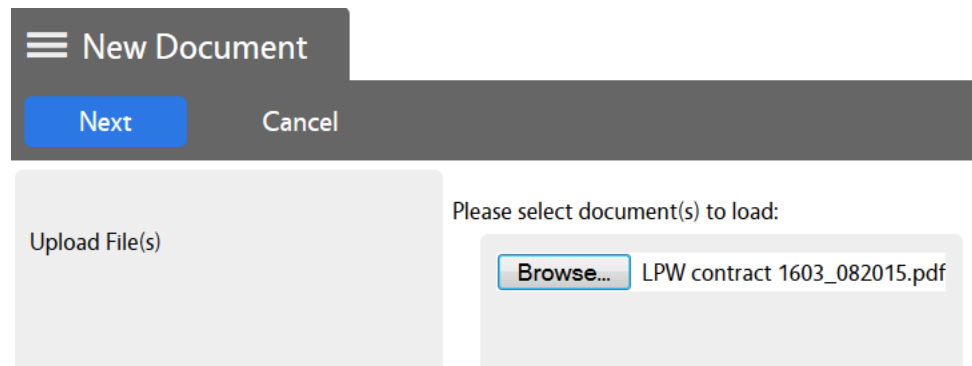
1. From the main Consultant Contract screen, go to the "Related Documents" view:



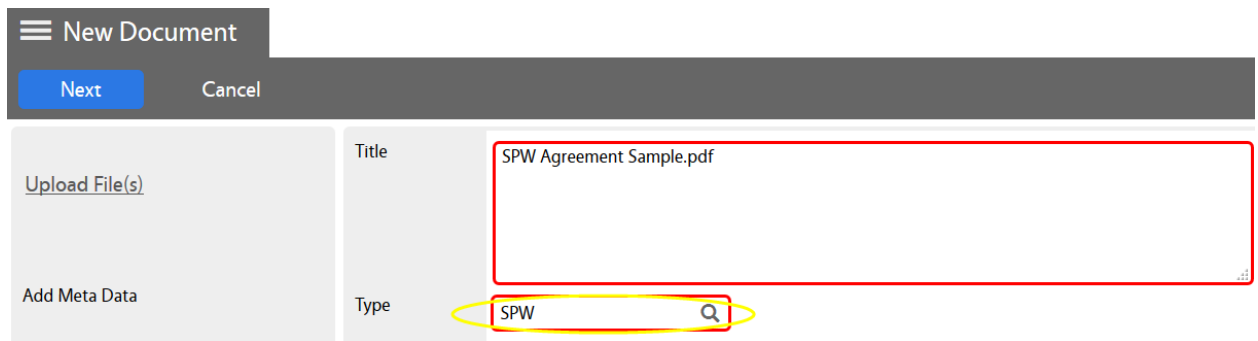
2. On the Related Documents view, click on **Edit**



3. Click on **Add**
4. Browse for the SPW agreement PDF file and click on **Next**



5. Enter the Document Type. In this case "SPW":



6. Click on **Next** three times to bypass meta data and permissions options.
7. Click on **Save** on the Related Documents screen.


Related Documents ROCIO About Help Logou

**Save** Cancel AIM

**1605** Last Edited by ROCIO EVANS On 08/11/2015 09:23 AM

Haley Center - Building Wide, Fire Systems, etc. - TEST

Document Listing Attach Link **Remove** Add

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
	<a href="#">SPW Agreement Sample.pdf</a>	1.0	SPW		Aug 11, 2015

8. Click on **Back** (or on Edit if you need to revise anything).

☰ Related Documents

**← Back** **Edit**

Action

[Download](#)

4. Change the Status as follows in order to send the agreement to the AD for Review.

1. Click on **Edit**

- If Contract is initiated by design, change status to **AD DES REVIEW**
- If Contract is initiated by construction, change status to **AD CONSTR REVIEW**