CA-02

Contract Account Setup Definition

This training document is for specifically adding an account to the Consultant/Construction Contract Screen.

Responsibility: ADMIN ASSOC LRFP

The Admin Assoc LRFP will perform the following procedures in AiM for adding an Account to the Consultant/Construction Contract Screen.

Contract Account Setup:

- From Quick Search, click: Consultant Contract (Contract Administration Module > Consultant/Construction Contract)
- 2. Click: ^Q Search to open the Contract to be edit



3. Select Contract number hyperlink, click: Edit

AIM Consultant Contract						JAMES	About	Logout		
Search	New									
Action			<u>Contract</u>	Description	<u>Type</u>	<u>Status</u> fl	Capital Project	Contractor	Address Cod	<u>le</u>
Export		Ø	<u>1029</u>	REQUEST PROPOSAL FOR ON-CALL CONSULTANT FOR CIVIL DESIGN	ON-CALL UTIL	EXECUTE TO	CP16-0328	V0002083270	1	
View CONTRACT ON-CALL UTILITIES- REQUEST PROPOSAL		Ø	<u>1044</u>	NEW RESLIFE ARCH Contract Test 8.1.1	LRFP	COMPLETED	CP16-0431	V0002011080	TUL	
		Ø	1046	Test 8.1.1 Consultant contract for design of morril avenue utilities project.	ON-CALL UTIL	COMPLETED	CP16-0430	V0002083270	1	_

- 4. Click: Account Setup (left side bar)
- 5. All accounts attached to the respective project will show on this screen. If you wish to add accounts, click: Load hyperlink. If not, simply enter the following fields:

AiM Consultant Contract						
Save Cancel						
View	1029					
Extra Description Workflow Account Setup	REQUEST PROPOSAL FOR ON-CALL CONSULTANT FOR CIVIL DESIGN					
Contact Information						

- a. Sub code
- b. Contract Encumbered Amount

AiM Account Setup				JAMES About Logout	
Done Cancel					
View	1029	Last Edited by RUBY LADD On 10/09/2015 04:58 PM	Line Encumbered	\$0.00	
Offset Account Setup	REQUEST PROPOSAL FOR ON-CALL CONSULTANT FOR CIVIL DESIGN		Contract Encumbered	\$0.00	
			Total Encumbered	\$0.00	
			Contract Remaining	\$7,533.00	
			Difference	\$7,533.00	
	Accounts		2 0	Totals Remove Load	
	Account	Subcode Lin	e Encumbered Contrac	t Encumbered Total Encumbered	
	AA281030 ELEC POWER DISTR EXP	8240 PROFESSIONAL	\$0.00	\$0.00	
		Line Total	\$0.00	\$0.00 \$0.00	
	Funding Source			${f C}$ Totals	
	Funding Source	Funding Group Lin	e Encumbered Contrac	t Encumbered Total Encumbered	
	ALLOCATION FUNDS FY16	ALLOCATION FUNDS	\$0.00 \$0.00	\$0.00	

CA-02-ADD ACCOUNT TO CONTRACT

- 6. Click: Offset Account (left side bar)
 - a. Click: ^Q Zoom to search for Account Field and select the Offset Account.
- 7. Click: **Done** to return to the account setup screen.

AiM Offse	t Account					
1029		Last Edited by RUBY LADD On 10/09/2015 04:58 PM				
REQUEST PROPOS	AL FOR ON-CALL CONSULTANT FOR CIVIL DESIGN					
Offset Account		٩				
Offset Subcode	Q					

- 8. After all Account information has been entered, Click: **Done** to return to the Contract Screen.
- 9. From the Consultant Contract Screen, review for accuracy and click: Save

AiM Consultant Contract JAMES About Logout							
Save Cancel							
View	1029		Last Edited	d by RUBY LADD On 10/09/2015 04:58 PM	Status		
Extra Description Workflow Account Setup Contact Information Commissioning Plan Subcontractors	REQUEST PROPO	SAL FOR ON-CALL CONSULTANT FOR CIVIL D	ESIGN		Type Reference Number Capital Project	ON-CALL UTIL ON-CALL UTILITIES CP16-0328 LIGHT POLE BASES	
Notes Log User Defined Fields <u>Status History</u>	Contractor	V0002083270 Q CEC CORP	Request	(Aug 17, 2015 🛗	Currency	USD US Dollar	
Related Documents	Address Code	4555 W MEMORIAL RD	Award		Award	\$7,533.00	
		OKLAHOMA CITY	Review		Amendment Tax	<u>\$0.00</u> \$0.00	
		731422013	Start		Total	\$7,533.00	
	ierms	<u></u>	End		Expensed	<u>\$0.00</u>	
	Bid Amount	\$0.00			Remaining	\$7,533.00	