

AIM 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.

AiM Contract Account Setup Navigation:

Menu Navigation:

Main Menu > Contract Administration Module > Consultant/Construction Contract > Choose Contract > View/Select Dropdown > Account Setup

Workdesk Navigation:

Quick Search Content Channel > *Consultant/Construction Contract* > *Choose Contract* > *View/Select Dropdown* > *Account Setup*

The Quick Steps required to add an Account to the Contract Screen in AiM:

- 1. Navigate to the Contract Screen through the Navigation methods shown above (demonstration below is through the Quick Search Channel for a Consultant Contract. The process is the same for Construction Contracts).
- 2. Search for/open the Contract to be edited (if you know the Contract #, you can type it into the field next to the search icon)
- 3. Once the record is open, place the project in "Edit Mode," and navigate to the Account Setup Screen through the View/Select Dropdown Menu.
- 4. All accounts that are attached to the respective project will show on this screen. If you wish to add accounts, click the "Load Accounts," hyperlink. If not, simply enter the following fields:
 - a. Sub code
 - b. Contract Encumbered Amount
- 5. After all Account information has been entered, click the "Green Done Flag" in the top right-hand corner.
- 6. Once back to the Capital Project Screen, click the "Save" button to save your progress.



AIM CONTRACT ACCOUNT SETUP SCREEN SHOTS:

7. Navigate to the Contract Screen through the Navigation methods shown above (demonstration below is through the Quick Search Channel for a Consultant Contract. The process is the same for Construction Contracts).

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8. Search for/open the Contract to be edited (if you know the Contract #, you can type it into the field next to the search icon)

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Contract	Editor Edit Date	Status
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		Reference Number
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Contractor	Request	Currency
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	Review	Amendment \$0.00
		Tax \$0.00
	Start	Total \$0.00
Terms	End	Expensed \$0.00
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	1017	ARCHITECT/DESIGN SERVICES FOR KSQ ON NEW RESLIFE BUILDING	LRFP	COMPLETED	CP15-0037	KSQ ARCHITECTS	MAIN
Ø	<u>1018</u>	DESIGN SERVICES FOR COLVIN CENTER RENOVATION	ON-CALL FMCS	COMPLETED	CP15-0043	1363	001
	1019	TEST NO-GO STATUSES AND CANCELLED CONTRACT FOR FMCS	ON-CALL FMCS	CANCELED	CP15-0043	1363	001
0	1020	LIBRARY LAWN SEWER DESIGN	ON-CALL UTIL	COMPLETED	CP15-0039	1363	001
0	1023	GREEK WALK \$80K ALABACK DESIGN, ALABACK NOT IN CONTRACT SO USED COBB	ON-CALL LANDSCP	COMPLETED	CP15-0051	1363	001
Ø	1024	COLVIN REC. CENTER RENOVATION 2.	ON-CALL FMCS	AWARDED	CP15-0054	1363	001
Ø	1025	TEST COLVIN CONTRACT TO BE CANCELLED.	ON-CALL FMCS	CANCELED	CP15-0054	1032	TUL
Ø	1035	WELCOME PLAZA DESIGN FOR ALABACK	ON-CALL LANDSCP	COMPLETED	CP15-0060	1363	001
Ø	1037	DESIGN FOR MORRILL AVE UTILITIES \$50,000	ON-CALL UTIL	COMPLETED	CP15-0062	1363	001
Ø	1038	OWNER-ARCHITECT CONTRACT - KSQ - NEW RESIDENCE HALL 2	LRFP	AWARDED	CP15-0057	KSQ ARCHITECTS	MAIN
à	1040	DESIGN FOR NEW PLANT FOR 6000	UTILITIES	COMPLETED	CP15-0086	1363	001
	1041	TEST CONTRACT	LRFP	REQUESTED	CP15-0030	1039	OKC

9. Once the record is open, place the project in "Edit Mode," and navigate to the Account Setup Screen through the View/Select Dropdown Menu.

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🔳 Cons	ultant Contract		View:	Select 🔹 😼	<>> ≥ 0 1 2 3 5
Contract	1041	Editor Edit Date	MKEELIN Mar 10, 2015 02:57 PM	Status Type	REQUESTED LRFP
Description	TEST CONTRACT			Reference Number Capital Project	LRFP CP15-0030
Contractor Contractor	1039	Dates Request		Totals Currency	NEW CENTRAL PLANT
Address Code	ADI OKC 3801 MOULTON DRIVE	Award		Award	US FOLLAR
	ACCT 52575 OKLAHOMA CITY	Review		Amendment Tax	<u>\$0.00</u> \$0.00
Ferms	73179	End		Total Expensed	\$0.00
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			Line Total	\$0.00	\$0.00	\$0.00



- 10. All accounts that are attached to the respective project will show on this screen. If you wish to add accounts, click the "Load Accounts," hyperlink. If not, simply enter the following fields:
 - a. Sub code
 - b. Contract Encumbered Amount

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			Line Total	\$0.00	\$0.00		\$0.00

11. After all Account information has been entered, click the "Green Done Flag" in the top right-hand corner.

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Contract	1041	Editor	MKEELIN	Line Encumbe	red	\$0.00
		Edit Date	Mar 10, 2015 02:57 PM	Contract Encu	umbered	\$0.00
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12. Once back to the Capital Project Screen, click the "Save" button to save your progress.

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ontractor	(1039 P	Request		Currency	USD US DOLLAR
ddress Code	OKC /	Award		Award	\$0.00
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