



AIM™ CONTRACT ACCOUNT SETUP

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:

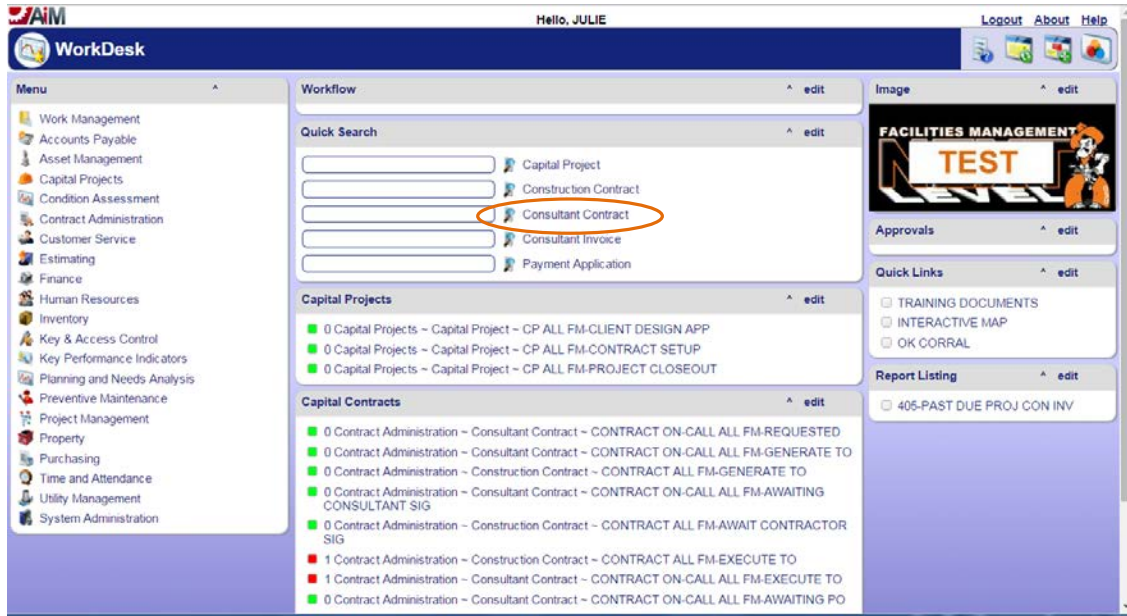
1. Navigate to the Contract Screen through the Navigation methods shown above (demonstration below is through the Quick Search Channel for a Consultant Contract. The process is the same for Construction Contracts).
2. Search for/open the Contract to be edited (if you know the Contract #, you can type 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.



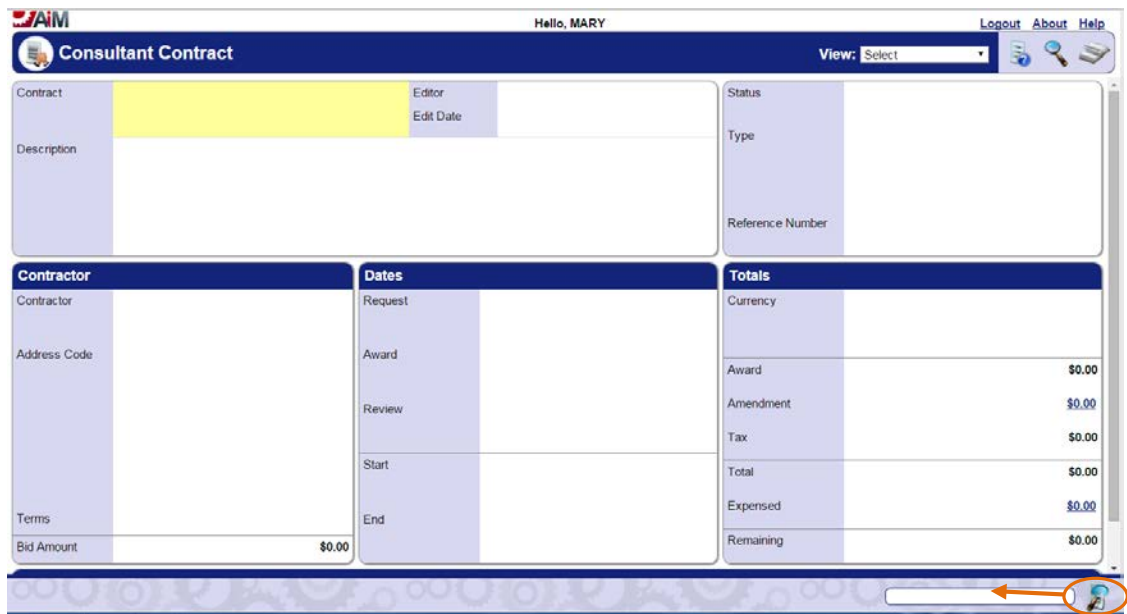
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AIM CONTRACT ACCOUNT SETUP SCREEN SHOTS:

- 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).



- 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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Consultant Contract

Contract ID	Description	Type	Status	Capital Project	Location	Office
1016	AE DESIGN FOR HALL OF FAME RE-PAVE	LRFP	AWARDED	CP15-0036	1363	001
1017	ARCHITECT/DESIGN SERVICES FOR KSQ ON NEW RESLIFE BUILDING	LRFP	COMPLETED	CP15-0037	KSQ ARCHITECTS	MAIN
1018	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
1020	LIBRARY LAWN SEWER DESIGN	ON-CALL UTIL	COMPLETED	CP15-0039	1363	001
1023	GREEK WALK \$80K ALABACK DESIGN, ALABACK NOT IN CONTRACT SO USED COBB	ON-CALL LANDSCP	COMPLETED	CP15-0051	1363	001
1024	COLVIN REC. CENTER RENOVATION 2.	ON-CALL FMCS	AWARDED	CP15-0054	1363	001
1025	TEST COLVIN CONTRACT TO BE CANCELLED.	ON-CALL FMCS	CANCELED	CP15-0054	1032	TUL
1035	WELCOME PLAZA DESIGN FOR ALABACK	ON-CALL LANDSCP	COMPLETED	CP15-0060	1363	001
1037	DESIGN FOR MORRILL AVE UTILITIES \$50,000	ON-CALL UTIL	COMPLETED	CP15-0062	1363	001
1038	OWNER-ARCHITECT CONTRACT - KSQ - NEW RESIDENCE HALL 2	LRFP	AWARDED	CP15-0057	KSQ ARCHITECTS	MAIN
1040	DESIGN FOR NEW PLANT FOR 6000	UTILITIES	COMPLETED	CP15-0086	1363	001
1041	TEST CONTRACT	LRFP	REQUESTED	CP15-0030	1039	OKC

Page 1 of 1 Display: 25 Records Found = 17

- 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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Consultant Contract View: Select

Contract	1041	Editor	MKEELIN	Status	REQUESTED
		Edit Date	Mar 10, 2015 02:57 PM	Type	LRFP
Description	TEST CONTRACT			Reference Number	LRFP
				Capital Project	CP15-0030
					NEW CENTRAL PLANT

Contractor		Dates		Totals	
Contractor	1039	Request		Currency	USD
ADI		Award			US DOLLAR
Address Code	OKC	Review		Award	\$0.00
	3801 MOULTON DRIVE	Start		Amendment	\$0.00
	ACCT 52575	End		Tax	\$0.00
	OKLAHOMA CITY			Total	\$0.00
	OK			Expensed	\$0.00
	73179			Remaining	\$0.00
Terms					
Bid Amount	\$0.00				

Record 17 of 17



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Consultant Contract View: Select

Contract	1041	Editor	MKEELIN	Status	REQUESTED
		Edit Date	Mar 10, 2015 02:57 PM	Type	LRFP
Description	TEST CONTRACT			Reference Number	LRFP
				Capital Project	CP15-0030 NEW CENTRAL PLANT

Contractor	Dates	Totals
Contractor: 1039 ADI Address Code: OKC 3801 MOULTON DRIVE ACCT 52575 OKLAHOMA CITY OK 73179 Terms: Bid Amount: \$0.00	Request: Award: Review: Start: End:	Currency: USD US DOLLAR Award: \$0.00 Amendment: \$0.00 Tax: \$0.00 Total: \$0.00 Expensed: \$0.00 Remaining: \$0.00

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Account Setup View: Select

Contract	1041	Editor	MKEELIN	Line Encumbered	\$0.00
		Edit Date	Mar 10, 2015 02:57 PM	Contract Encumbered	\$0.00
Description	TEST CONTRACT			Total Encumbered	\$0.00
				Contract Remaining	\$0.00
				Difference	\$0.00

Accounts Refresh Totals Load Accounts				
<input type="checkbox"/> Account	Subcode	Line Encumbered	Contract Encumbered	Total Encumbered
<input type="checkbox"/> STEAM PRODUCTION STEAM PRODUCTION		\$0.00	\$0.00	\$0.00
Line Total		\$0.00	\$0.00	\$0.00

Funding Source Refresh Totals				
Funding Source	Funding Group	Line Encumbered	Contract Encumbered	Total Encumbered
ML 2015X		\$0.00	\$0.00	\$0.00
Line Total		\$0.00	\$0.00	\$0.00



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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:
- Sub code
 - Contract Encumbered Amount

The screenshot shows the AIM Account Setup interface. At the top, it says "Hello, JULIE" and has "Logout About Help" links. The main header is "Account Setup" with a "View: Select" dropdown. Below this, there are three main sections: Contract, Accounts, and Funding Source.

Contract Section:

Contract	1041	Editor	MKEELIN	Line Encumbered	\$0.00
		Edit Date	Mar 10, 2015 02:57 PM	Contract Encumbered	\$0.00
Description	TEST CONTRACT			Total Encumbered	\$0.00
				Contract Remaining	\$0.00
				Difference	\$0.00

Accounts Section:

Account	Subcode	Line Encumbered	Contract Encumbered	Total Encumbered
<input type="checkbox"/> STEAM PRODUCTION STEAM PRODUCTION	<input type="text"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00
Line Total		\$0.00	\$0.00	\$0.00

Funding Source Section:

Funding Source	Funding Group	Line Encumbered	Contract Encumbered	Total Encumbered
ML 2015X		\$0.00	<input type="text" value="\$0.00"/>	\$0.00
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.

This screenshot is identical to the previous one, but the "Green Done Flag" icon in the top right corner of the "Account Setup" header is circled in red, indicating where the user should click to save the changes.



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- Once back to the Capital Project Screen, click the “Save” button to save your progress.

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Consultant Contract View: Select

Contract	1041	Editor	MKEELIN	Status	REQUESTED
		Edit Date	Mar 10, 2015 02:57 PM	Type	LRFP
Description	TEST CONTRACT			Reference Number	LRFP
				Capital Project	CP15-0030
					NEW CENTRAL PLANT

Contractor		Dates		Totals	
Contractor	1039	Request		Currency	USD
ADI		Award			US DOLLAR
Address Code	OKC	Review		Award	\$0.00
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	ACCT 52575	End		Tax	\$0.00
	OKLAHOMA CITY			Total	\$0.00
	OK			Expensed	\$0.00
	73179			Remaining	\$0.00
Terms					
Bid Amount	\$0.00				

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