Contract Approval

What are Contracts?

In ePM, use a contract to record the terms, conditions and amounts of project commitments. A contract that represents money leaving the project is known as an expense contract. Use contracts to track planned and actual obligations as well as manage the execution of work under those obligations. Actual contracts will be assembled, negotiated and issued using other GSA tools and applications. Before approving a contract in ePM, enter the detailed schedule of values and attach a scanned copy of the executed contract to the ePM record. The schedule of values enables breakdown of the contract for effective management of the contracted work. Each line on the schedule of values must be assigned to a cost account. In addition, the line can be coded to a Building ID, CSI Code and Shell / TI space.

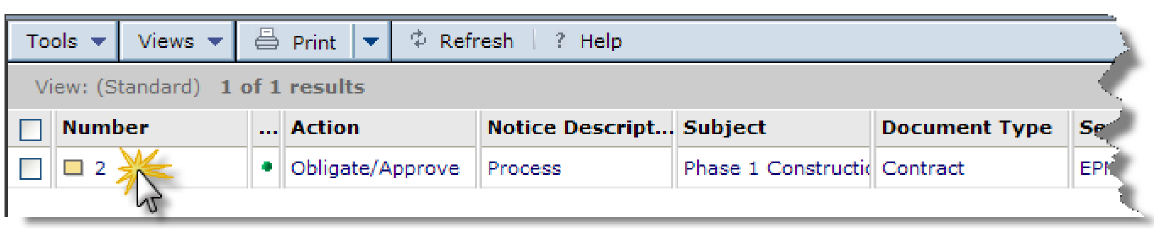
Who Will Use This?

√ Construction Manager
√ Project Manager

Steps to Approve a Contract

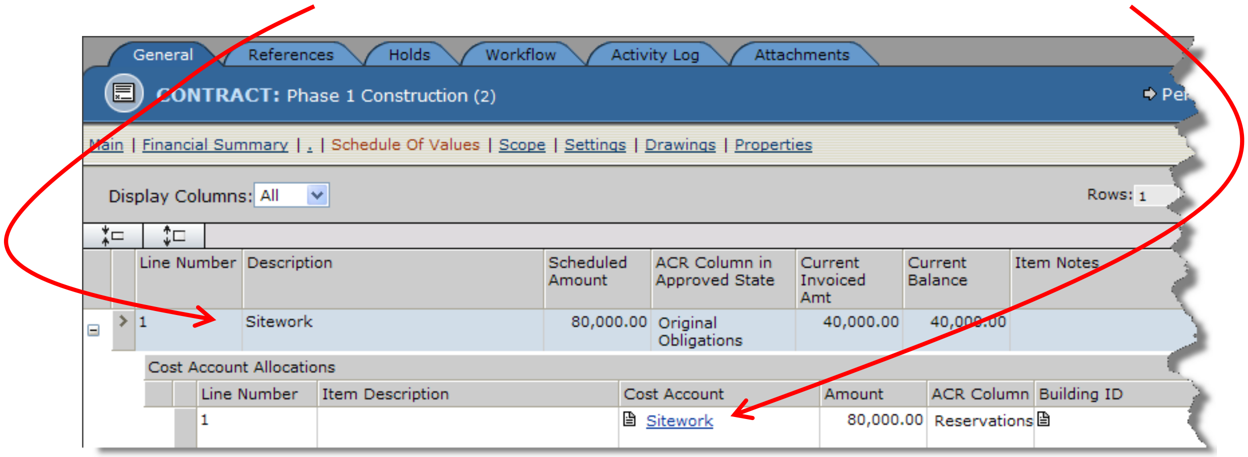
1. Log into ePM as a user with the Contract Approver security role, then navigate to the appropriate project.

2. Navigate to the Notices register by clicking on the Notices section, then My Notices, and Received. The Notices register displays, showing the Contract document that requires action.

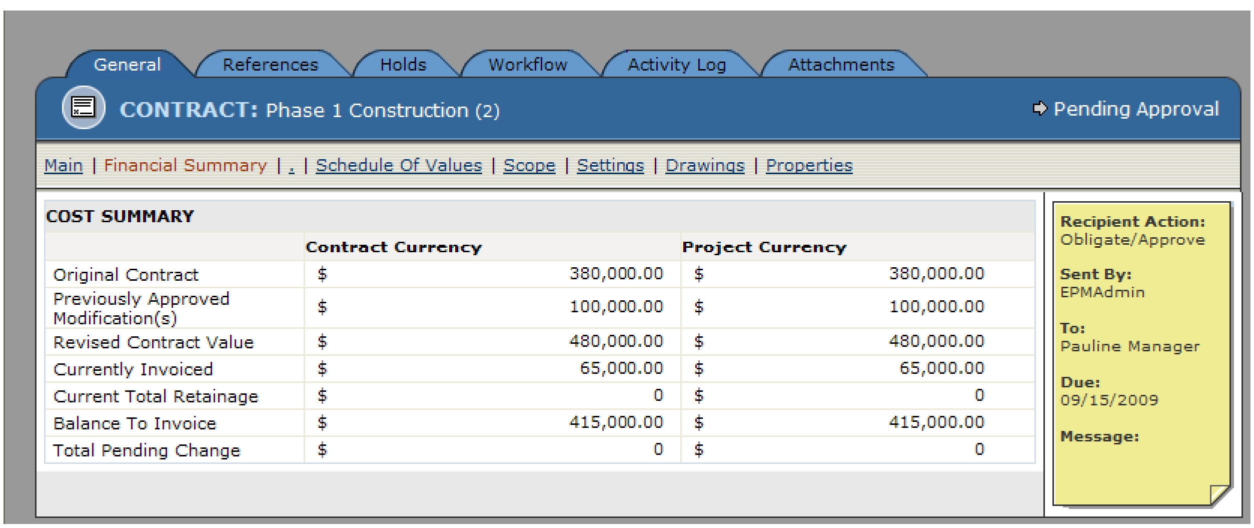


3. Click on any of the hyperlinks for the document to open it. To access the document another way, on the Navigation Pane on the left side of the screen, click PM Tools > Contract Management > Contracts. The Contract document register appears on the right side of the screen. Click the Document Number or Title to open it.

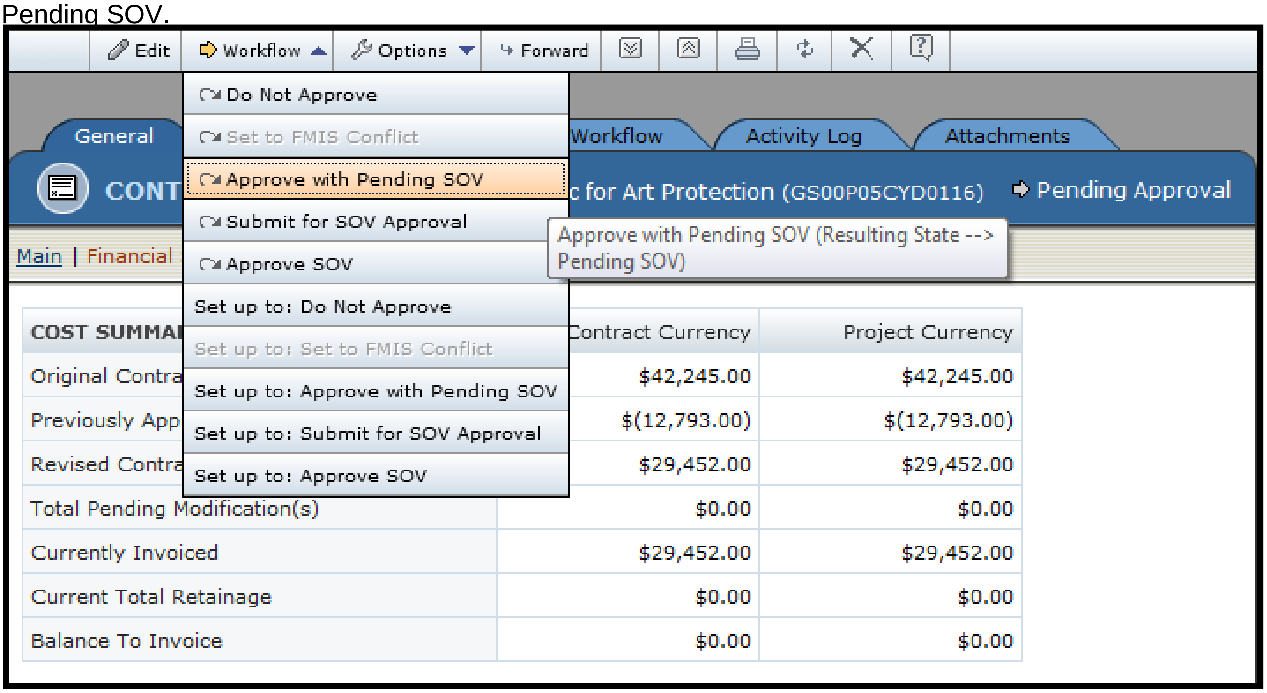
4. The Contract document opens showing the Main page. Click on the Schedule of Values page to see individual line items of the contract, along with their respective cost account allocations.



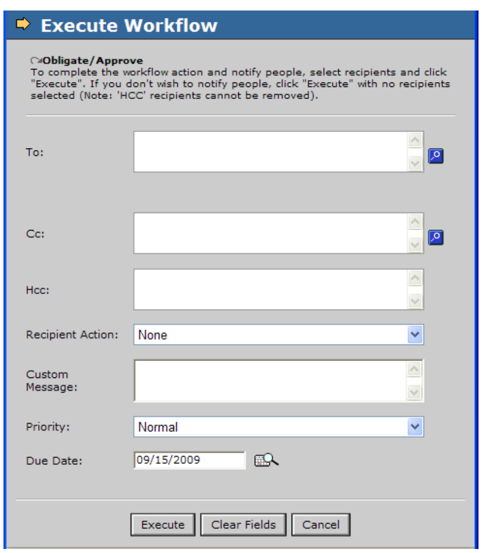
5. Click on the Financial Summary page to view all contract line items as a single sum.



6. If the financial data is correct and the schedule of value is complete select the Approved SOV If the financial data is correct and the schedule of values is incomplete select Approve with Pending SOV.



7. The Execute Workflow dialog box appears. Click the ‘Execute’ button to complete the workflow and approve the Contract document. A confirmation dialog appears after successful execution of workflow.



Tips

√ Required fields are marked with an asterisk.

√ Use the ‘Forward’ button if collaboration is required from other users.

√ Values on the Financial Summary and Settings pages are read only.

√ Click on the Activity Log tab to view the audit trail of the document.

√ Click on the Attachments tab to attach the scanned copy of the executed contract

√ Clicking the online help button provides generic help related to contracts, NOT for the specific uses of GSA’s Contract documents.

√ Click on the Financial Summary page throughout the workflow process to view the assignment of Contract dollars to various ACR columns.

√ To explode or collapse sections in a document, click on the double headed arrow buttons:

√ Notices with yellow icons require action; blue means a document was forwarded; white means user was cc’d.

√ For additional help and support, contact the local ePM Regional Point of Contact