

Contracts Quick Reference Guide

This topic provides a reference for the **Contracts** activity center.

Purpose

The **Contracts** activity center is where you create contract records, contract documents, track contract workflow, and see a summarized view of the full Contract financial status for quick analysis.

Audience

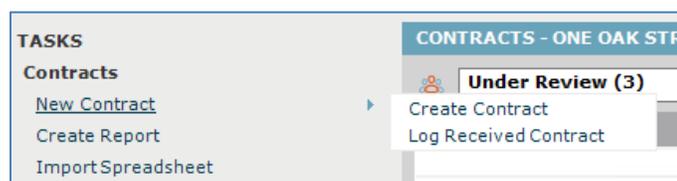
Internal project managers or administrators with Financial Manager license permissions in Newforma Project Center.

Key Features

- Create and track contract records and provide cost code-level of detail for contract commitments.
- Create contract documents ready for signature using customizable Word templates.
- Track the complete contract workflow process including forwarding contracts for review or signature, recording reviewer responses, and sending and closing (finalizing) contracts.
- View summarized information of the contract's financial status, including all change orders and potential change orders, and quickly drill-down into the related documents that compose the financial forecast.

To create a contract

1. To create a new contract record, go to the **Contracts** activity center and click **New Contract > Create Contract** in the **Tasks** panel to create a new contract originating with your company.



2. In the **Create Contract** dialog, fill in any required fields such as **Subject**, **ID**, **To Company**, and **From Company**. Select the correct form template and fill in any other details as desired.

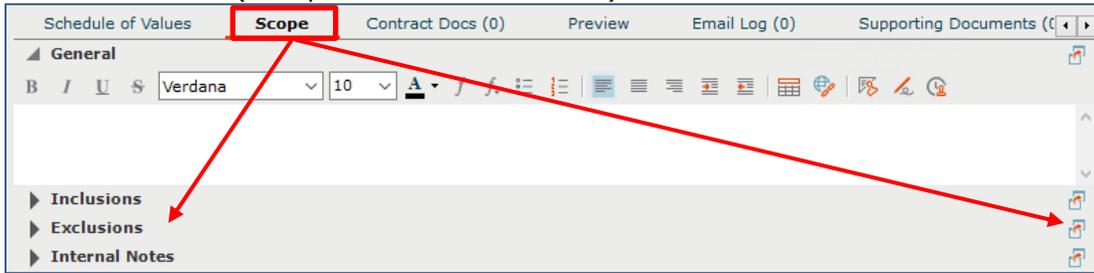
Three default form templates are provided. Each can be customized and/or you can create your own templates.

3. Select the **Schedule of Values** tab to add commitment items to the contract that you want to track. Select **Add New** to add a new row, fill in the information as needed, and repeat the process for each line you want to add. **Cost Code** is a required field. Use the **Cost Codes** activity center to add or import cost codes from an Excel spreadsheet.

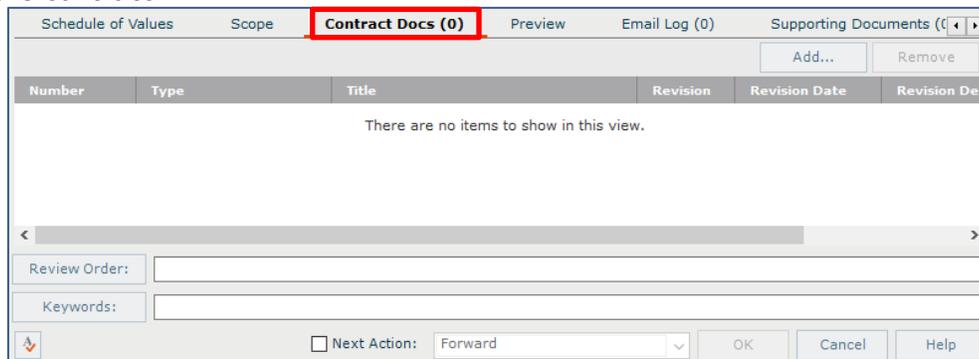
Item Number	Cost Code	Cost Code Name	Item Description	Commitment Amount (USD)
Auto Number	001	...	Professional Services	

If you are creating a contract record simply to track a log of contract values, this is the only tab needed. The remaining steps in this section are only used if you are generating the contract documents for signature.

4. Select the **Scope** tab to describe the work included in the contract, as well as other general information. Select  to the far right of each section to enlarge the field. This information merges into the contract document (except for **Internal Notes**).



5. Select the **Contract Docs** tab to add specific revisions of record documents from the **Document Control** activity center. These are the drawings, specifications, and contract exhibits that form the legal basis of the contract.



6. Select the **Preview** tab to see a preview of the final contract document.



7. Select **OK** to save the contract.

To merge the contract document

Once you have created the contract record, you can optionally create the contract document to be sent for signature using one of the default form templates, or using a form template you have customized or created.

1. Before you can create the contract document, the correct form template must be selected in the **Form Template** field on the contract record.

2. Select the contract from the log view and select **View Form** from the **Tasks** panel.

3. The resulting merged contract document appears. You can **Print** or use **Save As** to save the file. If you are ready to take the next step, select the **Next Action** checkbox and select **Forward** (for review or signature). This creates a PDF of the contract and attaches it to the Forward Contract workflow step.

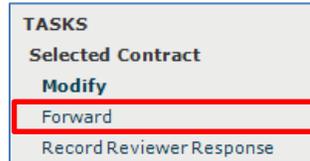
Subcontract Agreement JEFFERSON MILL ASSOCIATES			
PROJECT:	One Oak Street 12 2018001.12	SUBCONTRACT:	2018001.01
		DATE:	3/13/2018
SUBCONTRACTOR:	CONTRACTOR:	PROJECT NAME/LOCATION:	
Jefferson Mill Associates 01 55 Mill Way Manchester, NH 03103	Initech Design Group, Inc. 1750 Elm Street Manchester, NH 03104	One Oak Street 12 1 Oak Street Manchester, NH 03101	
SUBCONTRACTOR CONTACT:	CONTRACTOR CONTACT:	OWNER:	
Adam Klose 01	Mary Green 01	Guy & Company	
SUBCONTRACTOR PHONE:	CONTRACTOR PHONE:	JOBSITE PHONE:	
408-482-8817	137-719-1548		

Select **Send** to choose how to send a .PDF file of the contract and whether to record a transmittal for it.

To forward a contract for review or signature

Once the contract document is created, saved in your project files, and linked to the contract record, you can use the **Forward** task to send for review or send for signature.

1. Select the contract in the log and select **Forward** in the **Tasks** panel.



2. The **Forward Contract dialog box** opens. Edit any information as needed. Add any files to the **Files to Send** tab as needed and select the forwarding method from the **Send Via** drop-down list. Select **Forward** to forward the contract.

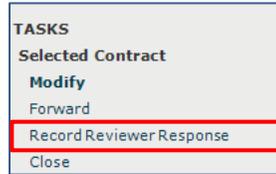
A screenshot of the 'Forward Contract' dialog box. The dialog has a title bar with a close button. It contains several fields: 'To:' (Required), 'Transmittal ID:' (Auto Number), 'Contract ID:' (2018001.01), 'CC:', 'From:' (Required), 'Subject:' (Professional Services - LEED Consultant), 'Purpose:' (For Signature), 'Date:' (Friday, April 17, 2020), 'Due back:' (No Due Date), and 'Send Via:' (Info Exchange). There are also checkboxes for 'Hide recipient list' and 'Remind' (2 days before due). Below these fields is a 'Remarks' section with a rich text editor toolbar and a large text area. At the bottom, there is a 'Keywords:' field and buttons for 'Print or save form after filing', 'Forward', 'Cancel', and 'Help'.

3. If Info Exchange was chosen as the forward method, fill out the Info Exchange options and select **OK** to complete the transfer.

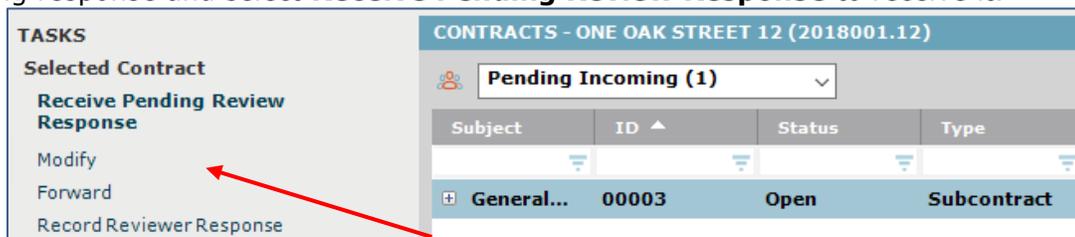
To record a reviewer response

When the reviewer response is received you can record it as a workflow action for the contract. Review responses can originate from Info Exchange, Email, mail, internal staff, etc.

1. If internal staff is recording their review, select the contract, select **Record Reviewer Response** in the **Tasks** panel, then go to step 3 below.



2. If the response is coming from Info Exchange, it will be in the **Pending Incoming** category. Select the incoming response and select **Receive Pending Review Response** to receive it.



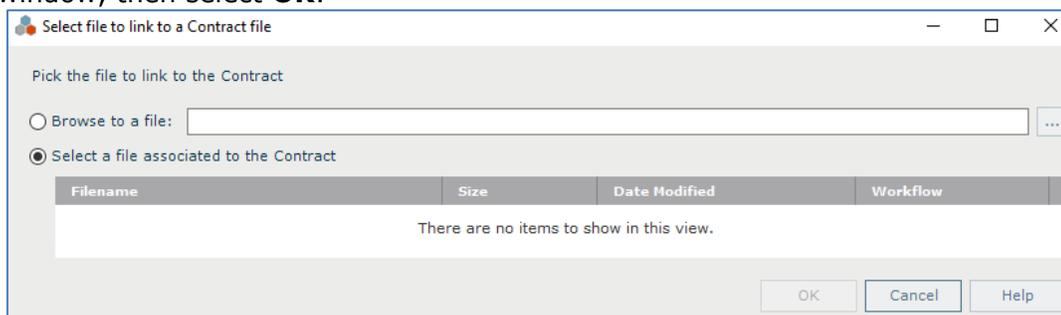
3. The **Record Reviewer Response for Contract dialog box** opens. Review the information, then select **Record Response**.

To link the executed contract file to the contract

1. Once the contract is finalized and signed you can link the signed, scanned file to the contract record. Select the contract in the log and select **Link the Executed Contract File** in the **Tasks** panel.



2. In the **Select File to Link to a Contract File dialog box**, browse to find the file or select it from the files in the window, then select **OK**.



3. The file appears on the contract record in the **Executed Contract** field and appears on the **Preview** tab for quick reference.

Status: Open Form Template: Subcontract Agreement

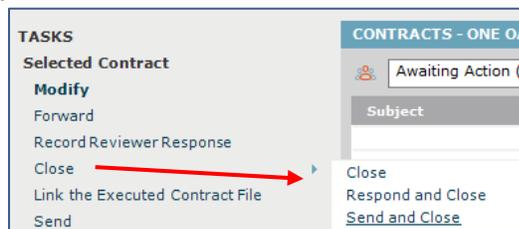
Executed Contract: \\JMA-DEMO-NPCS01\projects\2018001.12\12 CAD\05 As-Builts\Alpengrove - A101.pdf ...

Optionally, instead of using the task to do this, you can select the button to the right of this field and browse to find the file.

To close (finalize) the contract

After the contract is reviewed and contract documents have been signed and saved, you can take the next workflow action to close (finalize) the contract to indicate that the contracted work can begin.

- Select one of the following options for closing depending on whether you originated the contact or if you received it and need to send it back to the originator:
 - Close** – Use this option if you just want to finalize the contract and there is no need to send it to anyone.
 - Respond and Close** – Use this option if you received the contract from someone else and you want to respond back to who you received it from and mark it finalized.
 - Send and Close** – Use this option if you want to send the contract to someone other than the originator and mark it finalized.



- The **Select Files to Send dialog box** opens. Select the contract document(s) and/or other files to send, select the method (Info Exchange or Email), then select **OK**.

- The **Send and Close Contract dialog box** opens. Fill out the **To** field. If desired, use the button in the **Remarks** section below to copy the review remarks into the **Remarks** field and/or edit as needed. Fill in any other information and select **Create and Transfer**.

Send and Close Contract

To: Transmittal ID:
Contract ID: 2018001.01

CC:

From:

Subject:

Purpose:

Date:

Send Via:

Remarks Contract Summary Description of Contents (0) Files to Send (0) Email Log (0) Related Items (0) Change Log

Summary: **Internal Notes**

Received from: Mary Green 01 (Initech Design Group, Inc.)
General:

Exclusions:

Remarks:

Keywords:

Print or save form after filing Create Related:

- If Info Exchange was chosen as the send method, fill out the Info Exchange options and select **OK** to complete the transfer.