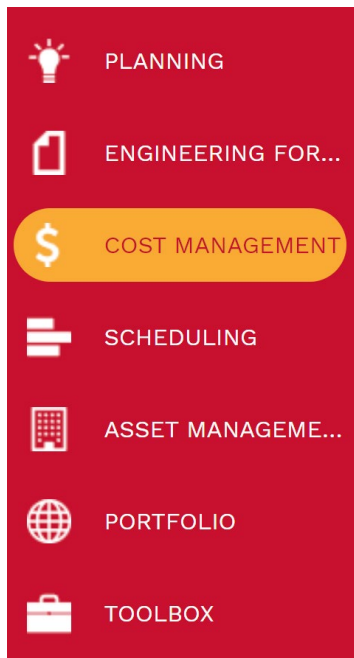


## **Establishing Master Commitments**

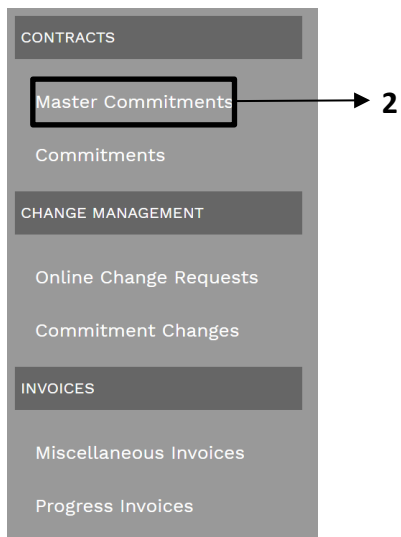
**Overview:** This process is for entering a Continuing Service Agreement (CSA) into PM Web. The Master Commitment record is used to manage the CSA and the Commitment record is used to write Project Agreements against the CSA.

**Reference:** n/a

1- Click **COST MANAGEMENT** (buttons on the left)



2- **Contracts**, Click **Master Commitments**.



- 3- Click on + in the top bar to add a new Master Commitment.
- 4- **Contract No.** field –Enter contract number.
- 5- **Company** field - Select from the Company drop down menu.
- 6- **Description** field - Enter a brief descriptive explanation of the contract scope.
- 7- **Type** field - Select appropriate type from drop down menu.
- 8- **Category** field – Select from the Category drop down menu.
- 9- **Start Date** field – Enter contract start date.
- 10- **End Date** field – Enter date for expiration of the base contract (this date is to be updated as extensions are approved).
- 11- **Project Manager** field – Select Project Manager from drop down menu. Can start typing name.
- 12- **RFP-RFQ** field – Enter RFQ number.
- 13- **HB1295 - Approved** field – Enter approved date if applicable, otherwise leave blank.
- 14- **BOR Approved Date** field – Enter approved date if applicable, otherwise leave blank.
- 15- **BOR Approved Amount** field – Enter approved amount, if applicable, otherwise leave blank.
- 16- **NTE Amount** field – Enter the Not To Exceed amount for the contract.
- 17- **K Number** field – Enter the contract K number.
- 18- **Approved Base Cost** field – leave blank. Sums all Project Agreements approved to date.
- 19- **Approved Reimbursable** field – leave blank. Sums all Reimbursables approved to date.
- 20- **DSE Multiplier** field – Enter the negotiated DSE Multiplier
- 21- Click the icon in the top header.

Contract No.*	<input type="text" value="W237500"/>	<b>4</b>	MASTER COMMITMENT RECAP	
Company	<input type="text" value="WALTER P MOORE &amp; ASSOCIATES INC"/>	<b>5</b>		
Description	<input type="text" value="IDIQ for Civil Engineering Support"/>	<b>6</b>	Original Value	<input type="text" value="\$0.00"/>
Type	<input type="text" value="Planning CSA"/>	<b>7</b>	Original Commitments	<input type="text" value="\$0.00"/>
Category	<input type="text" value="Civil Engineering"/>	<b>8</b>	Approved Changes	<input type="text" value="\$0.00"/>
Status / Revision	<input type="text" value="Draft"/> 0	<b>9</b>	Revised Value	<input type="text" value="\$0.00"/>
Start Date	<input type="text" value="04-06-2023"/>	<b>10</b>	Invoiced	<input type="text" value="\$0.00"/>
End Date	<input type="text" value="04-05-2026"/>		Balance	<input type="text" value="\$0.00"/>
			Retained	<input type="text" value="\$0.00"/>
			Pending Changes	<input type="text" value="\$0.00"/>
			Projected Value	<input type="text" value="\$0.00"/>
			Master Balance	<input type="text" value="\$0.00"/>

USER DEFINED FIELDS	
Project Manager	<b>11</b> <input type="text" value="Jim Taylor (University of Houston)"/>
RFP-RFQ	<b>12</b> <input type="text"/>
HB1295 - Approved	<b>13</b> <input type="text"/>
BOR Approved Date	<b>14</b> <input type="text" value="02-24-2022"/>
BOR Approved Amount	<b>15</b> <input type="text" value="4,000,000.00"/>
NTE Amount	<b>16</b> <input type="text" value="\$1,250,000.00"/>
K Number	<b>17</b> <input type="text" value="K-23-00850"/>
Approved Base Cost	<input type="text" value="\$0.00"/>
Approved Reimbursable	<input type="text" value="\$0.00"/>
DSE Multiplier	<b>20</b> <input type="text" value="2.5"/>

- 22- Under the **UH FIELDS** tab at the top, select the **Dates** tab on the left and enter dates in the **DATA** column.
- 23- Select the **Contacts** tab on the left and enter contact information in the **DATA** column.

MAIN	UH FIELDS	NOTES	ATTACHMENTS (1)	WORKFLOW
<b>Dates</b>	UH FIELD			DATA
<b>Contacts</b>	Primary Contact			
	Phone			
	Email			

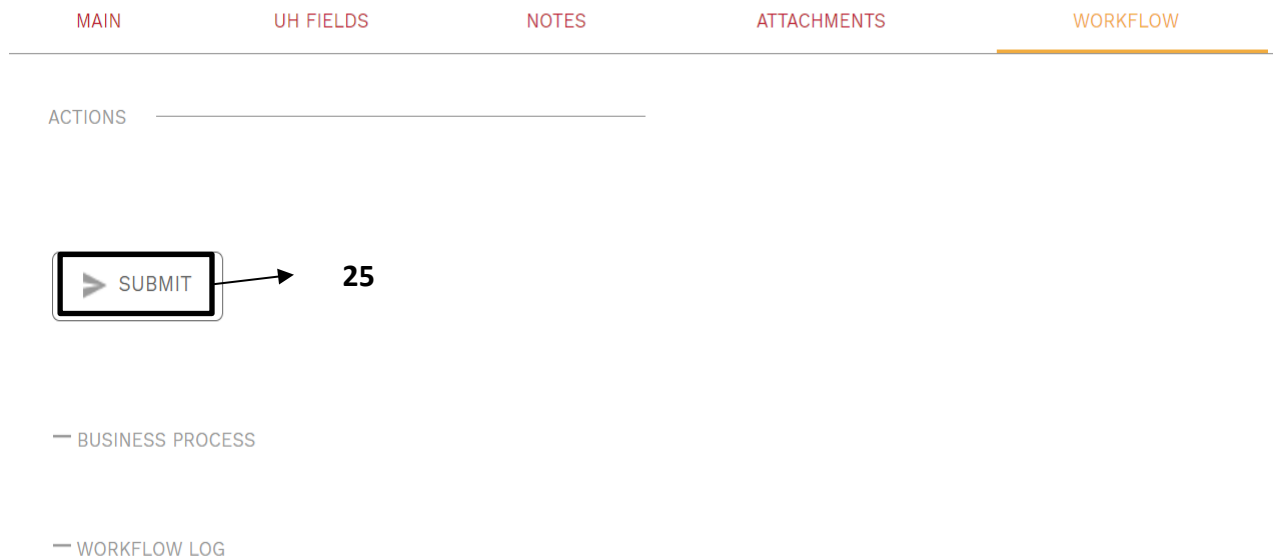
**24-** Under the **ATTACHMENTS** tab, add the contract and other documents by dragging to the 'Drop files here or click the Add button' section.



Drop files here or click the Add button

**25-** Under the **WORKFLOW** tab at the bottom, click on the **Submit** button.

**26-** Click on the **Save** after the page **refreshes**.



**27-** Upon Final Approval, Master Commitments become available for UH users to generate commitments.