



Software for Government

Staff User Manual

Chapter 3 – Contracts



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Chapter 3 – Contracts

The B2Gnow contract record contains the data collected between your organization and the prime contractor for construction, goods, or other types of services. In some situations we import contracts electronically into B2Gnow from an external system; in others the records are manually entered. The B2Gnow contract record manages common contract data, such as contract dollar value, prime contractor, and relevant dates. It also manages data specific to your contract compliance tracking and reporting needs. This data includes goal types, goal percentages, funding sources, subcontractor awards, and other relevant fields.

The B2Gnow contract record contains a large amount of data and is linked to other system records including prime contractors, subcontractors, buyers, and Contract Compliance Officers (CCO). The contract record and associated records are typically managed by the CCO.

Understanding the Contract Compliance Officer (CCO) Role

The CCO plays a critical role in the B2Gnow system by managing the contract record. The CCO is responsible for making sure that contract data has been imported or entered correctly into B2Gnow. Once the contract record is configured in B2Gnow, the CCO monitors contract audits and data to guarantee that accurate data is created and reported. This chapter contains the information needed by the CCO to properly create and manage their contract records.

Creating contracts

During the implementation process, B2Gnow configures your contract fields and settings based on your organization's preferences. You can create contracts directly in the system or your organization may have an interface that imports records from an external system (see the B2Gnow Data Import Process).

To create a contact

1. Open the **Create** menu, and then click **New Contract**.
2. Complete the form.

Contract: Compose

[Help & Tools](#)

On this page, you can compose your contract. There are two steps to this process: (1) Composing and (2) Reviewing your contract. When you're finished composing your contract on this page, click **Review** at the bottom of the page.

* required entry

Contract Information

You must enter a contract title and maximum value. The assigned department field is optional.

Title *	
Contract Number	
Contract Value (\$) *	
Contract Secondary Status	None selected ▼
Assigned Department *	None selected ▼
Council Motion Number	
Old Contract Number	
CIP #/WBS #	
Additional Reference 1	
Additional Reference 2	

Contract Dates

Enter a contract start date and end date. These are the dates that you want the auditing (if selected) to begin and end.

Start Date *	(mm/dd/yyyy)	End Date *	☐ Date: (mm/dd/yyyy) ☐ Duration: year(s)
The following dates are optional.			
Notice To Proceed Date	(mm/dd/yyyy)	Approval Date	(mm/dd/yyyy)
Initiation Date	(mm/dd/yyyy)	Work Order Date	(mm/dd/yyyy)

Prime Contractor Information

The contract must be assigned to a prime contractor. Enter the B2Gnow user number for the prime contractor, or click **Get Vendor** to search and select a user.

Prime Contractor *	Type name of prime contractor - use * before and after text for wildcard (e.g. *acme*) - not case sensitive, but punctuation and spaces are important - after selecting prime, the contact and address fields will auto-fill
	or Get Vendor from vendor database
Prime Compliance Contact *	None selected ▼ Contact not listed? QuickAdd a new compliance contact.
Prime Workforce/Prevailing Wage Contact *	None selected ▼ Contact not listed? QuickAdd a new workforce contact.
Prime Address *	None selected ▼ Address not listed? QuickAdd a new address.

NOTE: Some fields and options may be different based on your organization's configuration.

Organization Contacts

The contract must be assigned to a buyer/contract administrator; select a user from the list. Additional contacts can be designated.

Buyer/Project Manager (in-system user) * None selected

Additional Organization Contacts

	Name	Role	Department	Email	Phone & Fax (show extensions)
Contact #1:					P: - F: -
Contact #2:					P: - F: -
Contact #3:					P: - F: -

Contract Settings

Diversity Goal(s) * [» Help with goals](#)

Goal Type	Required Goal	Proposed/Committed Goal	Waiver (auto-calc)	Actual Goal
MBE:	%	%	%	%
WBE:	%	%	%	%
DBE:	%	%	%	%
SBE:	%	%	%	%

External Funding Sources [» Help with funding sources](#)

Funding source based on: -- select one --

Category	\$ Value	% Proportion
Federal:	\$	% « Calculate
State:	\$	%
Local:	\$	%

FHWA: %
FTA: %
FAA: %
FRA: %
HUD: %
Other: %

Contract Type * None selected

Contract Category None selected

Waiver * ☐ Yes » ☒ No
Attach Waiver File(s):
Waiver Details:

Exempt * ☐ Yes » ☒ No
Attach Exemption File(s):
Exemption Reason/Number:

Contract Process * ☒ Competitive ☐ Sole Source » ☐ Emergency ☐ Negotiated
Attach Sole Source File(s):
Sole Source Justification:

Funding Source None selected

Federal Funding Source None selected

Wage Schedule

Funding Code

Compliance Audit Settings	
Compliance Audit *	☒ Automatically [default] - create audits every month [default] starting from award/start date [default] and ending when contract is manually closed [default]. ☐ On Demand - create audits upon staff [default] request or financial system trigger for each month [default]. (Audit period interval cannot be changed once contract is created.)
Contract Compliance Officer	Houston Admin7
Payments to Prime Contractors *	☒ Entered by staff or from financial system [default] ☐ Self-reported online by prime contractor (until reported by staff or financial system)
Payments to Subcontractors *	☐ Entered only by staff ☒ Self-reported online by prime contractor [default] Payments to Lower Tier Subcontractors ☒ Only prime can report subcontractor payments at all tiers [default] ☐ Prime can report all tiers, lower level subcontractor can report its own subs
Confirmation by Subcontractors *	☒ Yes [default] - subcontractors will be contacted to confirm payment amounts. ☐ No
Subcontractor Zero Payment Auto-Confirmation *	☐ Yes - zero value payments will be auto-confirmed. ☒ No [default] - zero value payments must be confirmed by subcontractors.
Require Reporting of Sub Paid Date *	☒ Yes [default] - subcontractor paid date will be required. ☐ No
Collect Retainage Information *	☒ Yes [default] - subcontractors will be able to report retainage information. ☐ No
Allow Sub to Designate Final Payment *	☒ Yes [default] - subcontractor can designate their final payment. ☐ No

Workforce/Prevailing Wage Settings	
Select the appropriate settings for this contract. Some settings are optional, but by selecting them you will improve the quality and detail of your reports.	
Workforce/Prevailing Wage Audit *	☐ No workforce/prevailing wage audits of this contract. ☐ Automatically - create audits every quarter with per-employee summary starting (mm/dd/yyyy) and ending (mm/dd/yyyy). ☒ On Demand [default] - create audits upon staff [default] request each quarter with per-employee summary starting (mm/dd/yyyy) and ending (mm/dd/yyyy). (Audit period interval cannot be changed once contract is created.)
Workforce/Prevailing Wage Compliance Officer	Houston Admin7
Workforce/Prevailing Wage Data Reporting *	☐ Entered by staff ☒ Self-reported online by contractor [default] (or staff, if necessary)
Prime Can View Subcontractor Audits *	☐ Yes - prime will be able to view audits submitted by subcontractors. ☒ No [default]
Prime Approves Subcontractor Audits *	☐ Yes - prime will be required to approve subcontractor audits before submission. ☒ No [default]
Auto-Accept Workforce Audit Reports *	☒ None [default] - no workforce audit reports will be auto-accepted under any circumstance. ☐ No Work - only no-work workforce audit reports will be auto-accepted. ☐ All - all workforce audit reports will be auto-accepted.

The screenshot displays two main sections of the B2Gnow interface. The top section, titled "Contract Summary", features a left-hand sidebar with three tabs: "Commodity Codes", "Contract Summary", and "Special Notes". The "Commodity Codes" tab is active, showing a button labeled "Add Commodity Codes" and a message "No Codes Assigned". The "Contract Summary" tab is currently empty. The "Special Notes" tab is also empty. The bottom section, titled "Contract Files", contains a table with five rows, each representing a different type of contract document. Each row has an "Attach File" button next to it. Below the "Contract Files" section, there are three buttons: "Spell Check", "Review", and "Cancel".

Contract Summary	
Commodity Codes	Add Commodity Codes No Codes Assigned
Contract Summary	
Special Notes	

Contract Files	
Contract Document	Attach File
Master Agreement	Attach File
Pricing Agreement	Attach File
Terms & Conditions	Attach File
General Attached files	Attach File

Spell Check Review Cancel

3. To verify information, click **Review**.
4. Click **Save**.

Searching for and viewing contracts

You can complete a search for your contracts or quickly view your contract list. After locating the contract you want to work with, you can open it to view and update the contract details.

Searching for contracts

To complete a search, enter or select search parameters on the Search: Contracts page. You can complete a search as broad or narrow as you want. For example, you can search for all contracts assigned to your department or only search for contracts assigned to you.

To search for a contract

1. From the **Search** menu, click **Contracts**.
2. Enter or select search parameters. For search tips, see Chapter 1 – System Overview: Tips for performing searches.

[Users](#)
[Vendors](#)
[Contracts](#)
[Concessions](#)
[Outreach](#)

Search your organization's contract database. Enter information into any of the boxes below and click **Search**. Some parameters are required.

Search Parameters

Contract/Reference Number		(Contract number, financial system reference, project number)
Contract Title		
Containing Text		(Contract description, summary, notes, comments)
Contractor	☒ Prime ☐ Subcontractor ☐ Either	
Buyer/Project Manager		(Organization name, contact name)
Contract Compliance Officer	None selected	

Additional Search Parameters

Diversity Goal	From % to %	(enter values into either/both field(s))
Assigned Department	None selected	
Contract Type	None selected	
Contract Category	None selected	
Contract Status	All	
Contract Secondary Status	None selected	
Commodity Code	ACC CODES	
Contract Value Range	From \$ to \$	(enter values into either/both field(s))
Time Frame (mm/dd/yyyy)	Between and	(enter values into either/both field(s))
System Transaction Number	-	
Contract Process	Any	
Exempt	Either	

Advanced Search Parameters

Contract Payments	☐ Calculate and display payments to prime contractors ☐ Calculate and display payments to subcontractors
Contract Goal Status	☐ Calculate and display diversity goals and participation rates ☐ Display only contracts that are missing goal by at least 3% and have been open for at least 6 months and prime contractor has been paid at least 25% of contracted amount. ☒ Include prime contractor's share in calculation of participation rates

Additional Contract Fields

Funding Source	None selected
Federal Funding Source	None selected
Wage Schedule	
Funding Code	

Additional Subcontract Fields

Direct/Indirect Utilization	None Selected
Reference Identifier	
Subcontractor Work Description	
Contract Compliance Form	None selected
Certified Payroll	None selected
List of Subcontractors	None selected
Payroll Deduction Form	None selected
Tax Statement	None selected
Sub payment info	None selected

- Click **Search First 20 Matches**.

The matching results display. You can click a contract number or title to view more information about a specific contract.

To view contract record details from a search

- Search for and locate the contract you want to view.
- To access the contract main page, click the **Contract Number**, **Contract Title**, or **System Transaction #**.

To resort, click on column title.

Contract Number	Contract Title	Prime Contractor	Contract Amount & End Date	System Transaction #
	All ▾	All ▾	ALL ▾	All ▾
100010001	Service contract	B2Gnow Test Vendor 4	\$50,000.00 12/31/2012	00703034-001 Subs Audit

- To view the vendor profile, click the name of the **Prime Contractor**.
The Vendor Profile displays in a popup window.
- To access the **Contract Management: Subcontractor List** page, click the **Subs** hyperlink.
- To access the **Contract Audit: Audit Summary for Total Contract** page, click the **Audit** hyperlink.

Additionally, you can perform actions after completing a search, such as sending a contract letter or adding the prime contractors from the search results to an outreach campaign.

To perform actions after a contract search

- Search for the contracts for which you want to perform an action.
- To return to the Search: Contracts page, click **Search Again**.

To resort, click on column title.

Contract Number	Contract Title	Prime Contractor	Contract Amount & End Date	System Transaction #
	All ▾	All ▾	ALL ▾	All ▾
100010001	Service contract	B2Gnow Test Vendor 4	\$50,000.00 12/31/2012	00703034-001 Subs Audit

1 - 1 of 1 record displayed: Page 1 ▾

[Search Again](#)
[Send Contract Letters](#)
[Export](#)

[Message Contract Contacts](#)
[Add Primes & Subs to Outreach Campaign](#)

[Add Only Primes to Outreach Campaign](#)
[Add Only Subs to Outreach Campaign](#)

- To compose a letter or select a letter template to send, click **Send Contract Letters**, and then click **OK**.

NOTE: If you selected the contract goal status search parameter, the button is **Send Not Meeting Goal Letters**.

- To export the list, click **Export**, and then specify the details you want to export and click **Export Records**. If prompted, follow the browser instructions for saving the file.
- To send a message to all prime contractors listed in the search results, click **Message Contract Contacts** and complete the fields to send the message, as necessary.

6. To add prime and sub contractors listed in the search results to an existing outreach campaign, click **Add Primes & Subs to Outreach Campaign**, click **OK**, and then complete the fields, as necessary.
7. To add only the prime contractors listed in the search results to an existing outreach campaign, click **Add Only Primes to Outreach Campaign**, click **OK**, and then complete the fields, as necessary.
8. To add only the sub contractors listed in the search results to an existing outreach campaign, click **Add Only Subs to Outreach Campaign**, click **OK**, and then complete the fields, as necessary.

To search for your contracts

1. From the **Search** menu, click **Contracts**.
2. From the **Contract Compliance Officer** list, select your name.

Search Parameters	
Contract/Reference Number	(Contract number, financial system reference, project number)
Contract Title	
Containing Text	(Contract description, summary, notes, comments)
Contractor	☒ Prime ☐ Subcontractor ☐ Either
Buyer/Project Manager	(Organization name, contact name)
Contract Compliance Officer	None selected

3. Click **Search All Matches**.
A list of your contracts display. You can click a title to view more information about a specific contract.

Viewing your contract list

From the Data Dashboard, you can easily view information about your contracts, such as the number of active contracts and audits. You can also access the Diversity User Control Panel: Contracts page to view and sort through your contract list.

To view your contract list and contract details

1. From the **Data Dashboard**, click the **Contracts** hyperlink.

Data Dashboard view data dashboard		
Contracts and Concessions [Hide]	Contracts	Concessions
Total active	1	0
Audited	1	0

2. Use the lists to filter the number of contracts that display.

Diversity User Control Panel: Contracts Help & Tools									
Contracts	Contract Audits	Workforce Audits	Concessions	Conc Audits	Outreach	Cert Apps	Cert Change Requests	Applications	Support Messages
Displays all contracts. Click the transaction number to view.									
☒ Show ONLY contracts assigned to you									
1 - 1 of 1 records displayed: Previous Page < Page 1 > Next Page Records per page 20									
To resort, click on column title. Refresh Table									
Actions	Alert	Status	Secondary Status	Contract #	Description	Prime	End Date	Amount	
All		Open	All		All	All	All		
View	End within 6 mo.	Open			B2Gnow Test Vendor 4 Service contract		10/1/12 - 12/31/12	\$50,000.00	

3. To view contract details, click the **View** hyperlink.

Working with the Contract Management page

After opening the contract you want to view, you can use the tabs on the Contract Management window to navigate and perform actions for different sections of the contract. For example, you can navigate to the Subs tab to add or edit a subcontractor, complete actions for prime contractors, and communicate with contractors.

Contract Management Help & Tools									
Main	View	Settings	Subs	Docs	Change Orders & Task Orders	Alerts	Comments	Messages	Closeout
Compliance Audit List	Compliance Audit Summary	Compliance Audit FY	Reviews	Site Visits	Reports				
100010001: Service contract Prime: B2Gnow Test Vendor 4 10/1/2012 - 12/31/2012						Status: Open Current Award: \$50,000 Goal: 0.00% Total Paid: \$0 % Credit: 0.00% For Credit: \$0			

Viewing the Contract Management page

When you open the contract, the Contract Management page displays with the Main contract tab open. You can view basic contract information, alerts, and status history, and access hyperlinks for updating and changing your contract's alerts and status.

Contract Management [Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)
[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Goal: **0.00%** Total Paid: **\$0**
 % Credit: **0.00%** For Credit: **\$0**

[Refresh Page](#)

Contract Information ?

Contract Title	Service contract
Contract Number	100010001
Prime Contractor	B2Gnow Test Vendor 4
System Transaction Number	00703034-001
Award/Start Date	10/1/2012
End Date	12/31/2012
Maximum Value	\$50,000.00

Contract Alerts ?

Alert 1	Goal is ZERO (edit , deactivate alert).
Alert 2	No SUBCONTRACTORS assigned to contract (assign , deactivate alert).

Contract Status & Actions ?

	Status	Actions	Previous Transactions
Contract Status	Open	View Contract , Edit Contract , Close Out Change Secondary Status to: None selected	
Contract Compliance Officer	Assigned	Change Compliance COO to: Houston Admin7	Assigned to: Houston Admin7
Contract Compliance Monitoring	Automatically (Monthly)		
Subcontractors	No subs	Manage Subcontractors	
Task Orders		Create Task Order	
Contract Amendments		Amend Contract , Change Value	None
Contract Extensions/Shortenings		Extend/Shorten Contract	None
Other Functions		Delete Contract , Vendor Archive , Full Archive , Copy Contract	

Contract Status History ?

Date/Time	Status	SubStatus	User
9/26/2012 1:38:02 PM CDT		Contract Created	Houston Admin7
9/26/2012 1:38:02 PM CDT	Open		Houston Admin7

Listed items are for date and time of user action. Close action date may not match contract close date.

Viewing detailed contract information

On the **Contract: View** page, you can view contract details, including settings and file attachments. You cannot update information from this page.

Contract: View
[Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#) | [Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Total Paid: **\$0**
 For Credit: **\$0**
 Goal: **0.00%**
 % Credit: **0.00%**

This is a detailed listing of the Contract.

Contract Information

Contract Title	Service contract
Contract Number	100010001
System Transaction Number	00703034-001
Assigned Department	CS
Current Contract Value	\$50,000.00
Original Contract Value	\$50,000.00
Contract Value Change	\$0.00
Contract Secondary Status	
Council Motion Number	
Old Contract Number	
CIP #/WBS #	
Additional Reference 1	
Additional Reference 2	

Contract Dates

Award/Start Date	10/1/2012	End Date	12/31/2012
Notice To Proceed Date		Approval Date	
Initiation Date		Work Order Date	

Prime Contractor Information

Vendor Name	B2Gnow Test Vendor 4
System Vendor Number	20018259
Vendor Compliance Contact Person	Justin Talbot-Stern
Phone	602-325-9277
Fax	602-325-9277
Email	b2gnowtest4@b2gnow.com
Address	5025 N Central Ave., #494 Phoenix, AZ 85012

Prime Contractor Information - Original Data

Vendor Name	B2Gnow Test Vendor 4
Vendor Contact Person	Justin Talbot-Stern
Phone	602-325-9277
Fax	602-325-9277
Email	b2gnowtest4@b2gnow.com

Buyer/Project Manager Information

Organization/Department	CS
System User Number	10000005-001
Division	
Project Manager Contact Person	Contract Administrator
System User Number	
Phone	713-123-1232
Fax	713-123-1233
Email	department5@cityofhouston.net
Address	City Hall Building Concourse Level 901 Bagby Suite B-113 Houston, TX 77002

Additional Organization Contacts ?				
Contact Role				
Contact Name				
Department				
Email				
Phone				
Fax				

Contract Settings ?					
Diversity Goal(s)	Goal Type	Required Goal	Proposed/Committed Goal	Waiver	Actual Goal
	MBE:	30.000%	0.000%	0.000%	0.000%
	WBE:	0.000%	0.000%	0.000%	0.000%
	DBE:	0.000%	0.000%	0.000%	0.000%
	SBE:	0.000%	0.000%	0.000%	0.000%
	Total Goal:	30.000%	0.000%	0.000%	0.000%
External Funding Sources					
Contract Type					
Contract Category					
Waiver	No				
Exempt Status	No				
Contract Process	Competitive Bid				
Funding Source					
Federal Funding Source					
Wage Schedule					
Funding Code					

Compliance Audit Settings ?	
Compliance Tracking	Yes - Submission of contract compliance reports will be required.
Contract Compliance Audit	Automatically - create audits every month starting from award/start date and ending when contract is manually closed.
Payments to Prime Contractor	Entered by staff or from financial system
Payments to Subcontractors	Self-reported online by prime contractor; only prime can report subcontractor payments at all tiers
Confirmation by Subcontractors	Yes - subcontractors will be contacted to confirm payment amounts
Subcontractor Zero Payment Auto-Confirmation	No - zero value payments must be confirmed by subcontractors
Require Reporting of Sub Paid Date	Yes - subcontractor paid date will be required.
Collect Retainage Information	Yes - subcontractors will be able to report retainage information.
Allow Sub to Designate Final Payment	Yes - subcontractor can designate their final payment.

Workforce/Prevailing Wage Settings ?	
Workforce Tracking	No

Contract Summary ?	
Commodity Codes	
Contract Summary	
Special Notes	

Contract Files ?	
Contract File(s)	View Attachments

Managing contract settings

On the **Contract: Settings** page, you can view and update the information that governs the contract, compliance audit, and workforce/prevailing wage settings (if configured).

Contract: Settings

Help & Tools

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)
[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Goal: **0.00%** Total Paid: **\$0**
 % Credit: **0.00%** For Credit: **\$0**

* required entry

Contract Settings

Contract Secondary Status: None selected

Compliance Audit Settings

Compliance Audit *	☒ Automatically [default] - create audits every month [default] starting from award/start date [default] and ending when contract is manually closed [default]. ☐ On Demand - create audits upon staff [default] request or financial system trigger for each month [default]. (Audit period interval cannot be changed once contract is created.)
Payments to Prime Contractors *	☒ Entered by staff or from financial system [default] ☐ Self-reported online by prime contractor (until reported by staff or financial system)
Payments to Subcontractors *	☐ Entered only by staff ☒ Self-reported online by prime contractor [default] Payments to Lower Tier Subcontractors ☒ Only prime can report subcontractor payments at all tiers [default] ☐ Prime can report all tiers, lower level subcontractor can report its own subs
Confirmation by Subcontractors *	☒ Yes [default] - subcontractors will be contacted to confirm payment amounts. ☐ No
Subcontractor Zero Payment Auto-Confirmation *	☐ Yes - zero value payments will be auto-confirmed. ☒ No [default] - zero value payments must be confirmed by subcontractors.
Require Reporting of Sub Paid Date *	☒ Yes [default] - subcontractor paid date will be required. ☐ No
Collect Retainage Information *	☒ Yes [default] - subcontractors will be able to report retainage information. ☐ No
Allow Sub to Designate Final Payment *	☒ Yes [default] - subcontractor can designate their final payment. ☐ No

Workforce/Prevailing Wage Settings

Workforce/Prevailing Wage Audit *	☒ No workforce/prevailing wage audits of this contract. ☐ Automatically - create audits every quarter with per-employee summary starting [mm/dd/yyyy] and ending [mm/dd/yyyy]. ☐ On Demand [default] - create audits upon staff [default] request each quarter with per-employee summary starting [mm/dd/yyyy] and ending [mm/dd/yyyy]. (Audit period interval cannot be changed once contract is created.)
Workforce/Prevailing Wage Data Reporting *	☐ Entered by staff ☒ Self-reported online by contractor [default] (or staff, if necessary)
Prime Can View Subcontractor Audits *	☐ Yes - prime will be able to view audits submitted by subcontractors. ☒ No [default]
Prime Approves Subcontractor Audits *	☐ Yes - prime will be required to approve subcontractor audits before submission. ☒ No [default]
Auto-Accept Workforce Audit Reports *	☒ None [default] - no workforce audit reports will be auto-accepted under any circumstance. ☐ No Work - only no-work workforce audit reports will be auto-accepted. ☐ All - all workforce audit reports will be auto-accepted.

Managing subcontractors

On the **Contract Management: Subcontractor List** page, you can add and manage subcontractors for the contract.

Contract Management: Subcontractor List [Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#) | [Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Goal: **0.00%** Total Paid: **\$0**
 % Credit: **0.00%** For Credit: **\$0**

[Add Subcontractor](#) Listed are the prime and subcontractors for this contract. Click **Add Vendor** to assigned more vendors, or click one of the **action** links to view, modify, delete, or deactivate a vendor.

Prime Contractor

Vendor Name	Certified	Inc. in Goal	Diversity Audit	Final Pmnt	Actions
B2Gnow Test Vendor 4	No	No		No	Select Action

Subcontractor Award Totals

	Current Contract Goal	All Subs	Original Subs Towards Goal With Deductions	Current Subs Towards Goal With Deductions	Subs Towards Goal
Amounts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Percentages	0.000%	0.000%	0.000%	0.000%	0.000%

Subcontractors

No subcontractors assigned to this contract.

[Print All Sub Letters](#) | [Print All Letters](#) | [Message All Subs](#) | [Message All](#) | [Outreach All](#)

[View Printable Vendor Checklist](#)

[Create Cert Tracking Log Records For All Contractors](#)

Identifying the prime contractor and the subcontractor

The prime contractor and subcontractor are easy to identify. The prime contractor is listed at the top of most pages in the Contracts module. You can view the full details of every vendor associated with the contract on the Subcontractor List.

Prime Contractor

Vendor Name	Certified	Inc. in Goal	Diversity Audit	Final Pmnt	Actions
B2Gnow Test Vendor 4	No	No		No	Select Action

Subcontractor Award Totals

	Current Contract Goal	All Subs	Original Subs Towards Goal With Deductions	Current Subs Towards Goal With Deductions	Subs Towards Goal
Amounts	\$7,500.00	\$3,750.00	\$3,750.00	\$3,750.00	\$3,750.00
Percentages	30.000%	15.000%	15.000%	15.000%	15.000%

Subcontractors

Subcontractor Name	Sub Tier	Certified	Orig. Award	Current Award	Type	Inc. in Goal	Diversity Audit	Final Pmnt	Actions
Sub Flooring, LLC	1	No	15.000%	15.000%	Sub 100%			No	Select Action

Adding a subcontractor to a contract

You can add multiple subcontractors to contracts.

To add a subcontractor to a contract

1. From the **Contract Management** page, click the **Subs** tab.
2. Click the **Add Subcontractor** button.

Contract Management: Subcontractor List [Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | **[Subs](#)** | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)

[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 7/2/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$25,000**
 Total Paid: **\$25,000**
 For Credit: **\$13,000**
 Goal: **30.00%**
 % Credit: **52.00%**

[Add Subcontractor](#) Listed are the prime and subcontractors for this contract. Click **Add Vendor** to assigned more vendors, or click one of the **action** links to view, modify, delete, or deactivate a vendor.

Prime Contractor					
Vendor Name	Certified	Inc. in Goal	Diversity Audit	Final Pmnt	Actions
 B2Gnow Test Vendor 4	No	No		No	Select Action ▾

3. In the **Vendor** field, type the name of the vendor and select it from the list, or click **Get Vendor** and complete a search for the firm.
 - **Vendor:** Select a vendor to auto-populate vendor information.
 - **Vendor Compliance Contact:** Select a compliance contact.
 - **Vendor Address:** Select the vendor's address.

*** required entry**

Vendor Information [?](#)

The record must be assigned to a vendor. Click **Get Vendor** to search and select a vendor, then select the contact and address.

Vendor * Type name of vendor
 - use * before and after text for wildcard (e.g. *acme*)
 - not case sensitive, but punctuation and spaces are important
 - after selecting prime, the contact and address fields will auto-fill
 or [Get Vendor](#) from vendor database

Vendor Compliance Contact * None selected ▾
 Contact not listed? [QuickAdd](#) a new compliance contact.

Vendor Address * None selected ▾
 Address not listed? [QuickAdd](#) a new address.

4. Fill in the **Contract Information** box.

- **Subcontractor Tier:** Select the firm to which the vendor reports.
- **Reference Identifier:** Add information that displays on the subcontractor lists.
- **Contracted Percent & Amount:** Specify the percent or amount for the vendor.
- **Type of Participation:** Select the item that reflects the vendor's type of participation for the contract.
- **Starting Paid to Date:** Enter amount paid as of the date displayed.
- **Final Amount Adjustment/Paid Retainage:** Specify if the subcontractor was paid retainage by the prime contractor or if you made another adjustment at the end of the contract.

Contract Information	
Select the settings for this record. Indicate whether this vendor will be included in the goal.	
Subcontractor Tier *	Subcontracts to: [Prime] B2Gnow Test Vendor 4 ▼
Reference Identifier	
Contracted Percent & Amount *	☐ By Percent: % ☐ By Amount: \$ Enter the <u>full</u> amount/percent of the subcontract or the percent relative to the total contract value (\$25,000). Do not deduct amount/percent of subcontracts awarded <u>by</u> this subcontractor.
Type of Participation *	Subcontractor/Subconsultant ▼ Percent of payments to be counted: 100.00 % Amount not to be included in award verification: \$ 0.00
Starting Paid To Date Amount	\$ 0 as of 7/31/2012 Enter the <u>full</u> starting amount paid to this subcontractor. Do not deduct starting amounts paid to lower tier subcontractors.
Final Amount Adjustment/Paid Retainage	\$ 0 Note: Date Paid: (mm/dd/yyyy) Enter the <u>full</u> final amount paid to this subcontractor. Do not deduct final amounts paid to lower tier subcontractors.

5. Fill in the **Settings** box.

- **Include in Compliance Audits?:** Select Yes or No for tracking payments.
- **Count Towards Certified Goal:** If Yes, select the type.
- **Goal Type:** Select the certified goal type.
- **Add vendor to existing audits for this contract?:** If Yes, the firm is added to prior audits so that payments can be back entered.
- **Final Payment Made?:** Select whether the final payment was made for the contract.
- **Subcontract Award Date:** Specify the subcontractor's start date.
- **Work Start Date:** Specify the date on which the actual work began.
- **Work End Date:** Specify the date on which the actual work ended.
- **Work Description:** Enter the type of work performed.
- **Commodity Codes:** Add codes, as needed.

Settings	
Include in Compliance Audits? *	☒ Yes - subcontractor is active and should be included in the periodic compliance audits of the contract. ☐ No - subcontractor is inactive.
Count Towards Certified Goal *	This setting is used only to set the default status on future compliance audits and the starting/final amount fields below. To change the status of all or specific existing payments, access the payment history for the contractor. ☒ Yes - Payments to this contractor count towards the selected goal (field below). ☐ No
Goal Type *	None selected ▼
Add vendor to existing compliance audits for this contract? *	☐ Yes - add this subcontractor to all audits going back to the period of October 2012 ▼ ☒ No. Subcontractor's first compliance audit will be the next one.
Final Payment Made? *	☐ Yes ☒ No
Subcontract Award Date *	(mm/dd/yyyy)
Work Start Date *	(mm/dd/yyyy)
Work End Date *	(mm/dd/yyyy)
Work Description *	
Commodity Codes *	Add Commodity Codes No Codes Assigned

6. Click **Review** and verify the information.

7. Click **Save**.

Approving subcontractor requests

Your organization may permit prime contractors to self-request additional subcontractors. Prime contractors can search the vendor directory and indicate how they intend to utilize each subcontractor. If you have the authority, you can either accept or deny the request. If not, you can record your recommendation.

To approve a subcontractor request

1. To access subcontractor requests from the dashboard, in the **Sub Requests** line, click the red number.

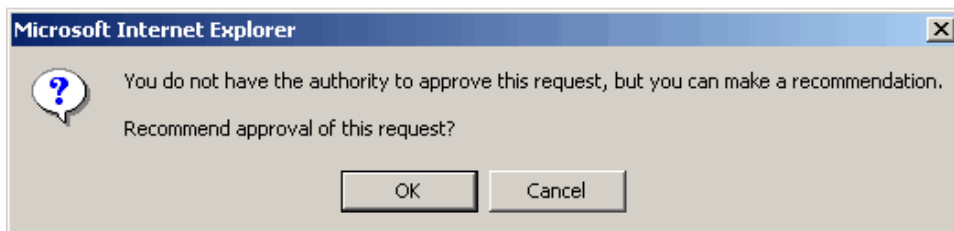
The screenshot shows a 'Data Dashboard' with a yellow header. Below the header, there are links for 'Contracts', 'Contract Audits', 'Sub Requests', and 'Support'. The 'Sub Requests' link is highlighted in red and has a red number '1' next to it. Below the links, there is a table with columns for 'Last 30 days', 'Last 3 months', and 'Last 12 months'. The 'Sub Requests' row shows a red number '1' in each of these columns. At the bottom, there is a message: 'Click **Hide** or **View** to configure your dashboard.'

2. To access subcontractor requests from the navigation menu, open the **View** menu, and then click **Sub Requests**.
3. Click the contract number.

The screenshot shows the 'Diversity User Control Panel: Contract Subcontractor Addition Requests'. It has a navigation bar with 'Contracts', 'Contract Audits', 'Sub Requests', 'Support', and 'Messages'. Below the navigation bar, there is a message: 'Displays all Contract Subcontractor Addition Requests. Click the **Reference Number** to view the request details. Click the **Contract Number** to view the contract details.' There is a checkbox labeled 'Show ONLY records assigned to you'. Below this, there is a table with columns: 'New', 'Date & Time', 'Reference #', 'Contract #', 'Prime Contractor', 'Subcontractor', 'Contract Title', and 'Status'. The table shows one record with a status of 'Pending'.

4. Review the request.
5. Click **Approve Request**.
6. Click **OK** to confirm you want to navigate to the next page to review and confirm the request.
7. Click **Review**.
8. Click **Save**.

If you are not authorized to take action, the system records your recommendation and the request remains open.



Certified, self-performing prime contractors

If a prime contractor is certified and will be counted towards the goal, the contract must be updated to reflect this status. The system tracks payments to certified, self-performing prime contractors using one of two methods:

Method 1: Calculated Remaining Amount

Payments to the prime contractors are calculated as the remaining amount after payments are made to **all** certified and non-certified subcontractors. This method requires that all subcontractors are tracked. For example:

Payment to prime contractor:	\$1,000,000
Payment to certified subcontractor:	\$100,000
Payment to non-certified subcontractor:	<u>\$150,000</u>
Remaining amount:	\$750,000
Amount counted to prime contractor:	\$750,000

Method 2: Separate Payment Tracking

Payments to the prime contractor are specifically reported and recorded on a separate line and are not derived from any other data. This method is used if not all subcontractors are tracked, specifically non-certified contractors. For example:

Payment to prime contractor:	\$1,000,000
Payment to certified subcontractor:	<u>\$100,000</u>
Remaining amount:	\$900,000
Payment to certified, self-performing prime contractor:	<u>\$750,000</u>
Amount "missing" from report (non-certified subcontractor):	\$150,000
Amount counted to prime contractor:	\$750,000

To use Method 1: Calculated Remaining Amount

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Subs** tab.

- In the **Prime Contractor** box, from the **Select Action** list, select **Edit Prime**.

Prime Contractor						
Vendor Name	Certified	Inc. in Goal	Diversity Audit	Final Pmnt	Actions	
B2Gnow Test Vendor 4	No	No	✓	No	Select Action Edit Prime View Prime Award Letter Info Letter Payments View Profile	

Subcontractor Award Totals					
	Current Contract Goal	All Subs	Original Subs Towards Goal With Deductions	Current Subs Towards Goal With Deductions	Subs Towards Goal
Amounts	\$80,000.00	\$40,000.00	\$20,000.00	\$40,000.00	
Percentages	80.000%	40.000%	20.000%	40.000%	

Subcontractors									
Subcontractor Name	Sub Tier	Certified	Orig. Award	Current Award	Type	Inc. in Goal	Diversity Audit	Final Pmnt	Actions
B2Gnow Test Vendor 7	1	No	20.000%	20.000%	Sub 100%	MBE	✓	No	Select Action
Sub Flooring, LLC	1	No	20.000%	20.000%	Sub 100%	SBE	✓	No	Select Action

- On the **Contract Management: Edit Prime Contractor** page, change the **Count Towards Certified Goal** to **Yes** and select the **Goal Type**.

Settings	
Count Towards Certified Goal *	This setting is used only to set the default status on future compliance audits and the starting/final amount fields below. To change the status of all or specific existing payments, access the payment history for the contractor. ☒ Yes - Payments to this contractor count towards the selected goal (field below). ☐ No
Goal Type	None selected
Final Payment Made? *	None selected MBE WBE DBE SBE
Work Description	
Commodity Codes	Add Commodity Codes No Codes Assigned

- Click **Review**.
- Click **Save**.

The Prime Contractor box will reflect that the prime is counted for credit.

Prime Contractor						
Vendor Name	Certified	Inc. in Goal	Diversity Audit	Final Pmnt	Actions	
B2Gnow Test Vendor 4	✓	MBE	✓	No	Select Action	

Subcontractor Award Totals					
	Current Contract Goal	All Subs	Original Subs Towards Goal With Deductions	Current Subs Towards Goal With Deductions	Subs Towards Goal
Amounts	\$80,000.00	\$40,000.00	\$20,000.00	\$40,000.00	\$40,000.00
Percentages	80.000%	40.000%	20.000%	40.000%	40.000%

Subcontractors									
Subcontractor Name	Sub Tier	Certified	Orig. Award	Current Award	Type	Inc. in Goal	Diversity Audit	Final Pmnt	Actions
B2Gnow Test Vendor 7	1	✓	20.000%	20.000%	Sub 100%	MBE	✓	No	Select Action
Sub Flooring, LLC	1	✓	20.000%	20.000%	Sub 100%	SBE	✓	No	Select Action

To use Method 2: Separate Payment Tracking

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Subs** tab.
3. Click the **Add Subcontractor** button.
4. Complete the process as if adding a subcontractor, but use the following settings:
 - **Contracted Percent & Amount:** enter the percent or amount of the contract the prime contractor will be self-performing.
 - **Type of Participation:** Select Self-Performing Prime Contractor.
 - **Include in Compliance Audits?:** Yes
 - **Count Towards Certified Goal:** Yes.
 - **Goal Type:** Select the goal type.

Contract Information	
Select the settings for this record. Indicate whether this vendor will be included in the goal.	
Subcontractor Tier *	Subcontracts to [Prime] B2Gnow Test Vendor 4
Reference Identifier	
Contracted Percent & Amount *	☒ By Percent 15 % ☐ By Amount \$
Enter the full amount/percent of the subcontract or the percent relative to the total contract value (\$100,000). Do not deduct amount/percent of subcontracts awarded by this subcontractor.	
Type of Participation *	Self-Performing Prime Contractor
Percent of payments to be counted: 100.0 %	
Amount not to be included in award verification: \$ 0.00	
Starting Paid To Date Amount	\$ 0 as of 5/31/2012
Enter the full starting amount paid to this subcontractor. Do not deduct starting amounts paid to lower tier subcontractors.	
Final Amount Adjustment/Paid Retainage	\$ 0
Note:	
Date Paid: (mm/dd/yyyy)	
Enter the full final amount paid to this subcontractor. Do not deduct final amounts paid to lower tier subcontractors.	

Settings	
Include in Compliance Audits? *	☒ Yes - subcontractor is active and should be included in the periodic compliance audits of the contract. ☐ No - subcontractor is inactive.
Count Towards Certified Goal *	This setting is used only to set the default status on future compliance audits and the starting/final amount fields below. To change the status of all or specific existing payments, access the payment history for the contractor. ☒ Yes - Payments to this contractor count towards the selected goal (field below). ☐ No
Goal Type	MBE

5. Click **Review**.
6. Click **Save**.

The Subs tab on the Contract Management: Subcontractor List page displays information about the self-performing contractor.

Prime Contractor									
Vendor Name	Certified	Inc. in Goal	Diversity Audit	Final Pmnt	Actions				
B2Gnow Test Vendor 4		MBE		No	Select Action				

Self-Performing Prime Contractor									
Self-Performing Prime Contractor	Sub Tier	Certified	Orig. Award	Current Award	Type	Inc. in Goal	Diversity Audit	Final Pmnt	Actions
B2Gnow Test Vendor 2	1	No	15.000%	15.000%	Self-Perf Prime 100%	MBE		No	Select Action

Self-Performing Prime Contractor and Subcontractor Award Totals					
	Current Contract Goal	All Subs & Self-Performing Prime	Original Credit Towards Goal With Deductions	Current Credit Towards Goal With Deductions	Credit Towards Goal
Amounts	\$80,000.00	\$55,000.00	\$35,000.00	\$55,000.00	\$55,000.00
Percentages	80.000%	55.000%	35.000%	55.000%	55.000%

Subcontractor Award Totals					
	Current Contract Goal	All Subs	Original Subs Towards Goal With Deductions	Current Subs Towards Goal With Deductions	Subs Towards Goal
Amounts	\$80,000.00	\$40,000.00	\$20,000.00	\$40,000.00	\$40,000.00
Percentages	80.000%	40.000%	20.000%	40.000%	40.000%

Subcontractors									
Subcontractor Name	Sub Tier	Certified	Orig. Award	Current Award	Type	Inc. in Goal	Diversity Audit	Final Pmnt	Actions
B2Gnow Test Vendor 7	1		20.000%	20.000%	Sub 100%	MBE		No	Select Action

Managing documents

On the **Contract Management: Documents** page, you can view a list of documents saved to the contract record, open documents, and add documents.

Contract Management: Documents

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100010001: Service contract

Prime: B2Gnow Test Vendor 4

10/1/2012 - 12/31/2012

Status: Open

Current Award: \$50,000

Goal: 0.00%

Total Paid: \$0

% Credit: 0.00%

For Credit: \$0

Add Document

Contract Documents

View

(TXT, 345 bytes)

Contract Document

sample_document.txt

Houston Admin7

9/28/2012

To add a document

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Docs** tab.
3. Click **Add Document**.

4. From the **Record** list, select the record associated with the document you want to attach.

Select a record, choose a document from your computer to attach, enter required information (*), and click **Add Document**. The document will be uploaded to the system and automatically associated with the selected record. You can view the attached document from the list below or the view page of the record.

Record *

-- Select a Record --

Select Document to Attach *

Document Title (if left blank, Document Title will default to the Document Name)

Document Description

5. Click **Browse**, and then locate and select the file.
6. In the **Document Title** and **Document Description** fields, enter the title and a description of the document.
7. Click **Add Document**.
8. Click **OK**.

Managing change orders and task orders

On the **Contract Management: Associated Records List** page, you can manage change orders to the contract, which includes changes in the value and/or end date of the contract. Contracts can also be linked together to create Master Contract – Task Order relationships. This is used for job order contracting, release contracting, oncalls, multi-phase project (design & build), and other complex situations. Each record has its own prime, subcontractors, goals, settings, and payments. If you are on a Master Contract or Task Order, the Master Audit Summary tab displays, and you can click the tab to view an aggregated summary of all linked records.

Contract Management: Associated Records List [Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | **[Change Orders & Task Orders](#)** | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)
[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Total Paid: **\$0**
 Goal: **0.00%**
 % Credit: **0.00%**
 For Credit: **\$0**

Below are listed change order and task orders associated with this contract.

Change Orders/Amendments ?

No change orders present for this contract.

[Change Contract Value](#)
[Extend/Shorten Contract](#)

Task Orders ?

No task orders present for this contract.

[New Task Order](#)
[Link Existing Contract As Task Order](#)

Contract references can be used to associate other contract numbers and purchase order numbers to this contract. During the import of contract payment data, payment records assigned to the associated reference numbers will be automatically matched to this contract. Click **Add Reference Record** to assign a new reference number. Click **Edit** or **Delete** to modify or delete an existing reference.

Referenced Records ?

No reference records assigned to this contract.

[» Add More References](#)

Creating change orders

You can use the Change Orders & Task Orders tab to change a contract's value or end date. When you change the value, you create an amendment to the existing contract that allows you to change the total value of the original contract and specify new values for meeting goals. You can also specify the percentages or amounts of the contract that will go to subcontractors.

When you change the contract's end date, you can end the contract on an earlier or later date than the current date on the contract.

To change the value of a contract

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Change Orders & Task Orders** tab.

- Click **Change Contract Value**.

Contract Management: Associated Records List Help & Tools

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100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Total Paid: **\$0**
 For Credit: **\$0**
 Goal: **0.00%**
 % Credit: **0.00%**

Below are listed change order and task orders associated with this contract.

Change Orders/Amendments ?

No change orders present for this contract.

- In the **Amendment Title** field, enter the title of the amendment.

Contract Management: Contract Value Amendment/Change Order Help & Tools

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[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

4600009807: Electric Supply Agreement between City of Houston and the Texas General Land Office, State Power Program. #C55805 (View Special Notes on Contract)
 Prime: Texas General Land Office
 4/14/2004 - 6/30/2013

Status: **Open**
 Current Award: **\$1,332,000,000**
 Total Paid: **\$918,884,083**
 For Credit: **\$117,959,836**
 Goal: **15.00%**
 % Credit: **12.84%**

Use this form to post an addendum or change order to the contract.

*** required entry**

Amendment/Change Order Information ?

Enter a title, date, and note for the amendment. Attach file(s) by clicking **Attach File**.

Amendment Title *
 Amendment Date * (mm/dd/yyyy)
 Amendment Note *

Attach File(s)

- From the **Amendment Date** calendar selector, select a date for the amendment.
- In the **Amendment Note** field, enter additional information about the amendment.

7. In the **Contract Amendment** area, specify whether you are creating an amendment for **The new TOTAL contract amount** or **The ADDITIONAL amount for the contract**, and then enter the amount.

Contract Information ?

Enter EITHER the values for the amendment OR the final contract values (after the amendment). Enter the same for the diversity goal.

Current Contract Amount \$1,332,000,000.00

Contract Amendment *

☐ The new TOTAL contract amount is: \$

☐ The ADDITIONAL amount for the contract is: \$

New Goal(s) *

☐ The percent of the TOTAL new contract amount is:

Goal Type	Required Goal	Proposed/Committed Goal	Waiver	Actual Goal
MBE:	0 %	0 %	0 %	15 %
WBE:	0 %	0 %	0 %	0 %
DBE:	0 %	0 %	0 %	0 %
SBE:	0 %	0 %	0 %	0 %

☐ The percent of the ADDITIONAL contract amount is:

Goal Type	Required Goal	Proposed/Committed Goal	Waiver	Actual Goal
MBE:	0 %	0 %	0 %	15 %
WBE:	0 %	0 %	0 %	0 %
DBE:	0 %	0 %	0 %	0 %
SBE:	0 %	0 %	0 %	0 %

8. In the **New Goal(s)** area, specify whether you are creating an amendment for The percent of **The TOTAL new contract amount** or **The percent of the ADDITIONAL contract amount**, and then enter the **Required Goal**, **Proposed/Committed Goal**, **Waiver**, and **Actual Goal** percentages for each category.
9. In the **Subcontractors** box, enter the **Percent/Amount of the ADDITIONAL contract amount**, **Percent/Amount of the TOTAL new contract amount**, and any **Comments** for each subcontractor.

Subcontractors ?

For each subcontractor, enter EITHER the percent assigned to them of the amendment value, or enter the final percent (including the original value and the amendment value). At least one, but only one, value should be entered.

Subcontractor	Goal Type	Current Award Amount/Percent	Percent/Amount of the ADDITIONAL contract amount	Percent/Amount of the TOTAL new contract amount	Comments
Allied Energy Resources Corporation	MBE	2.900%	%	2.900000 %	
Ampro Energy Wholesale, Inc.	MBE	2.000%	%	2.000000 %	
Choice Energy Services, LP	MBE	2.000%	%	2.000000 %	
Liberty Power Corp	MBE	3.000%	%	3.000000 %	
Natural Gas Trading Corporation	MBE	2.000%	%	2.000000 %	
Nine Energy Services, LLC	MBE	3.000%	%	3.000000 %	
One Nation Energy Solutions, LLC	MBE	3.000%	%	3.000000 %	
Pypha Energy, LLC	MBE	\$0	\$	\$	
Vesta Capital Partners, LP	MBE	3.600%	%	3.600000 %	

[Update Contract Goal Above](#)

Spell Check Review Cancel

10. Click **Review**, and then click **Save**.

To change the end date of a contract

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Change Orders & Task Orders** tab.
3. Click **Extend/Shorten Contract**.

Contract Management: Associated Records List Help & Tools

Main | View | Settings | Subs | Docs | **Change Orders & Task Orders** | Alerts | Comments | Messages | Closeout

Compliance Audit List | Compliance Audit Summary | Compliance Audit FY | Reviews | Site Visits | Reports

100010001: Service contract Status: **Open**
 Prime: B2Gnow Test Vendor 4 Current Award: **\$50,000**
 10/1/2012 - 12/31/2012 Goal: **0.00%** Total Paid: **\$0**
 % Credit: **0.00%** For Credit: **\$0**

Below are listed change order and task orders associated with this contract.

Change Orders/Amendments ?

No change orders present for this contract.

Change Contract Value **Extend/Shorten Contract**

4. From the **Extend/shorten contract** to calendar selector, select the date on which the contract ends.

Contract Management: Extend/Shorten Contract Help & Tools

Main | View | Settings | Subs | Docs | **Change Orders & Task Orders** | Alerts | Comments | Messages | Closeout

Compliance Audit List | Compliance Audit Summary | Compliance Audit FY | Reviews | Site Visits | Reports

4600009807: Electric Supply Agreement between City of Houston and the Texas General Land Office, State Power Program. #C55805 (View Special Notes on Contract) Status: **Open**
 Prime: Texas General Land Office Current Award: **\$1,332,000,000**
 4/14/2004 - 6/30/2013 Goal: **15.00%** Total Paid: **\$918,884,083**
 % Credit: **12.84%** For Credit: **\$117,959,836**

Use this form to extend the contract. Select a new ending date that is later than the current ending date and click **Submit**. To cancel without saving any changes, click **Cancel**.

*** required entry**

Contract Information ?

Current Ending Date 6/30/2013

Extend/shorten contract to 6/30/2013 (mm/dd/yyyy)

Note

Attach File(s)

5. Click **Review**, and then click **Save**.

Linking contract records

You can create a task order from another contract record and link it to a master contract. When multiple records are linked, the Master Contract Audit Summary appears to display a roll-up summary of all awards and payments across all linked contract records.

To link a task order to a master contract

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Change Orders & Task Orders** tab.
3. Click **Link Existing Contract As Task Order**.

Contract Management: Associated Records List Help & Tools

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)

[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Total Paid: **\$0**
 For Credit: **\$0**
 Goal: **0.00%**
 % Credit: **0.00%**

Below are listed change order and task orders associated with this contract.

Change Orders/Amendments ?

No change orders present for this contract.

Task Orders ?

No task orders present for this contract.

4. Click **Select a Contract to Link**.

Contract Management: Link Contract/Task Order Help & Tools

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)

[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

4600009807: Electric Supply Agreement between City of Houston and the Texas General Land Office, State Power Program. #C55805 (View Special Notes on Contract)
 Prime: Texas General Land Office
 4/14/2004 - 7/31/2013

Status: **Open**
 Current Award: **\$1,332,000,000**
 Total Paid: **\$918,884,083**
 For Credit: **\$117,959,836**
 Goal: **15.00%**
 % Credit: **12.84%**

5. Search for and select the contract you want to link.
6. To link the selected record as a task order on the master contract, click **Link Record**.

To unlink a task record from a master contract

1. On the **Contract Management: Associated Records List** page, click **Unlink**.

Contract Management: Associated Records List [Help & Tools](#)

Main | View | Settings | Subs | Docs | **Change Orders & Task Orders** | Alerts | Comments | Messages | Closeout

Compliance Audit List | Compliance Audit Summary | Compliance Audit FY | Master Audit Summary | Reviews | Site Visits | Reports

4600009807: Electric Supply Agreement between City of Houston and the Texas General Land Office, State Power Program. #C55805 (View Special Notes on Contract) Status: **Open**
 Prime: Texas General Land Office Goal: **15.00%** Current Award: **\$1,332,000,000**
 4/14/2004 - 7/31/2013 % Credit: **12.84%** Total Paid: **\$918,884,083**
 For Credit: **\$117,959,836**

Below are listed change order and task orders associated with this contract.

Change Orders/Amendments ?

Type	Date	Date Processed	Previous Value/Date	New Value/Date	Actions
Value Change	1/4/2006	8/14/2007	\$320,000,000.00	\$704,000,000.00	View
Value Change	5/30/2006	8/14/2007	\$704,000,000.00	\$704,000,000.00	View
Value Change	7/18/2007	8/14/2007	\$704,000,000.00	\$1,332,000,000.00	View
Extended	11/22/2012	11/22/2012	6/30/2013	7/31/2013	View

[Change Contract Value](#) [Extend/Shorten Contract](#)

Task Orders ?

Task Order/ Contract Number	Title	Vendor	Amount	Dates	Actions
C52212	ENG TESTING Services	DMJM Aviation, Inc.	\$1,051,000.00	1/9/2001 to 1/9/2005	View Unlink

[New Task Order](#) [Link Existing Contract As Task Order](#)

2. Click **OK** to confirm you want to remove the link to the master contract.

Managing contract alerts

On the **Contract: Alerts** page, you can add alerts for contracts and subcontractors. After you add alerts, you can view, edit, or delete them.

Contract: Alerts [Help & Tools](#)

Main | View | Settings | Subs | Docs | Change Orders & Task Orders | **Alerts** | Comments | Messages | Closeout

Compliance Audit List | Compliance Audit Summary | Compliance Audit FY | Reviews | Site Visits | Reports

100010001: Service contract Status: **Open**
 Prime: B2Gnow Test Vendor 4 Current Award: **\$50,000**
 10/1/2012 - 12/31/2012 Goal: **0.00%** Total Paid: **\$0**
 % Credit: **0.00%** For Credit: **\$0**

[Add New Alert](#)

Configured Alerts ?

Type	Alert	Activated	Actions
Contract Alert	Contract 100010001: Review information. Trigger: 10/31/2012	Pending	View Edit Delete

To add a contract alert

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Alerts** tab.

- Click **Add New Alert**.

Contract: Alerts Help & Tools

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#) | [Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

4600009807: Electric Supply Agreement between City of Houston and the Texas General Land Office, State Power Program. #C55805 (View Special Notes on Contract)
Status: **Open**
 Prime: Texas General Land Office Current Award: **\$1,332,000,000**
 4/14/2004 - 7/31/2013 Goal: **15.00%** Total Paid: **\$918,884,083**
% Credit: **12.84%** For Credit: **\$117,959,836**

Configured Alerts ?

No Alerts Configured

- Select the type of alert you want to configure.
Depending on the type of alert you selected, different fields display.

Select an alert type and enter the details. Click **Save Alert** to complete the process.

[General alert](#)
[Contract digest](#)
[Contract end alert](#)
[Contract progress alert](#)
[Subcontractor certification expiration alert](#)
[Subcontractor certification renewal alert](#)

Configured Alerts ?

No Alerts Configured

5. To configure a general alert, click **General alert**, and then complete the following:

Recipient(s): Select the check box to send an alert to yourself. Click **add more recipients** to use check boxes to send alerts to others.

Trigger Date: Use the calendar selector to specify the day on which you want to send the alert.

Alert Note: Enter the information you want to include in the alert.

[Add New Alert](#)

Select an alert type and enter the details. Click **Save Alert** to complete the process.

[General alert](#) [Contract digest](#) [Contract end alert](#) [Contract progress alert](#) [Subcontractor certification expiration alert](#) [Subcontractor certification renewal alert](#)

A General Alert will trigger on the selected date and you will be notified. Alerts are removed after a period of time; if you require a permanent note, click the **Comments** tab. Contract can be open or closed at time of trigger.

Recipient(s) * ☐ Send alert to yourself

» [add more recipients \(other staff, prime, subcontractors\)](#)

Trigger Date *  (mm/dd/yyyy)

Alert Note *
Included in any notification

[Save Alert](#)

6. To configure an alert prior to the end of the contract, click **Contract end alert**, and then complete the following:

Recipient(s): Select the check box to send an alert to yourself. Click **add more recipients** to use check boxes to send alerts to others.

Days Prior to End Date: Specify the number of days prior to the contract's end date that you want to send the alert.

Alert Note: Enter the information you want to include in the alert.

[Add New Alert](#)

Select an alert type and enter the details. Click **Save Alert** to complete the process.

[General alert](#)
[Contract digest](#)
[Contract end alert](#)
[Contract progress alert](#)
[Subcontractor certification expiration alert](#)
[Subcontractor certification renewal alert](#)

A Contract End Alert will trigger at a point prior to the end date of the contract. Contract must be open at time of trigger.

Recipient(s) * ☐ Send alert to yourself

» [add more recipients \(other staff, prime, subcontractors\)](#)

Days Prior to End Date * (enter a number)

Alert Note
Included in any notification

[Save Alert](#)

7. To configure an alert about prime contractor payments exceeding the specified progress level, click **Contract progress alert**, and then complete the following:

Recipient(s): Select the check box to send an alert to yourself. Click **add more recipients** to use check boxes to send alerts to others.

Progress Percent: Enter the percent at which the alert is triggered.

Alert Note: Enter the information you want to include in the alert.

[Add New Alert](#)

Select an alert type and enter the details. Click **Save Alert** to complete the process.

[General alert](#)
[Contract digest](#)
[Contract end alert](#)
[Contract progress alert](#)
[Subcontractor certification expiration alert](#)
[Subcontractor certification renewal alert](#)

A Contract Progress Alert will trigger when payments to the prime contractor exceed the specified progress percent level. Contract must be open at time of trigger.

Recipient(s) * ☐ Send alert to yourself

» [add more recipients \(other staff, prime, subcontractors\)](#)

Progress Percent * %

Alert Note
Included in any notification

[Save Alert](#)

8. Click **Save Alert**.

Managing comments

On the Contract Management: Comments page, you can add and work with comments. Comments can be added to a contract to make notes, set up alerts, and trigger reminders. Any comments associated with a specific contract display in a list on the Comments tab. You can add comments, edit or delete existing comments, and, if a comment was assigned a due date, view and save it to your calendar.

Contract Management: Comments [Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)

[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Goal: **0.00%** Total Paid: **\$0**
 % Credit: **0.00%** For Credit: **\$0**

[Add New Comment](#)

Comments				
User	Date Last Edited	Due Date	Comment	Actions
Houston Admin7	9/28/2012 8:34:47 AM CDT	-	Reviewed subcontractor information on 9/28.	Edit Delete

To add a comment to a contract

1. If necessary, open the contract to which you want to add a comment.
2. Go to the **Comments** tab.
3. Click **Add New Comment**.
4. In the **Comment Type** area, specify whether you want to add a **Standard Comment** or **Comment with Due Date**.

Enter comment information and parameters. Click **Save Comment** to complete the process.

Comment Type *
☐ Standard Comment
☐ Comment with Due Date: (mm/dd/yyyy)
☐ Add alert for this comment.

Comments *

[Save Comment](#)

5. If necessary, from the calendar selector, select the due date.
6. To create a **Comment with Due Date** alert, select **Add an alert for this comment**.
7. In the **Comments** area, enter your comment.
8. Click **Save Comment**.

Comments display in the list.

TIP: Comments that are created as an alert will be triggered on the selected Due Date and an email alert sent to you. The alert will also be shown on your dashboard.

To edit or delete a comment

1. To edit a comment, click the **Edit** hyperlink for the comment you want to update, edit the comment, click **Review**, and then click **Save**.

Comments ?				
User	Date Last Edited	Due Date	Comment	Actions
Houston Admin7	11/26/2012 1:19:35 AM CST	-	Reviewed subcontractor amount on 9/28.	Edit Delete

2. To delete a comment, click the **Delete** hyperlink for the comment you want to delete, and then click **OK**.

To view and save a comment to your calendar

1. If a comment has an associated Due Date, to add it to your calendar, click the **Calendar** hyperlink.

Comments ?				
User	Date Last Edited	Due Date	Comment	Actions
Houston Admin7	11/26/2012 1:22:23 AM CST	12/21/2012	Schedule follow-up discussion.	Edit Delete Calendar
Houston Admin7	11/26/2012 1:19:35 AM CST	-	Reviewed subcontractor amount on 9/28.	Edit Delete

2. Click **OK** to confirm you want to open and save it in your calendar.
3. Save the comment using your calendar's tools, which vary depending on the calendar software you use (e.g. Microsoft Outlook).

Viewing & sending messages

On the **Contract Management: Messages** page, you can view all messages sent for this contract. You send messages through areas in the contract where a contact's name displays as a hyperlink or a Message button displays for sending messages.

Contract Management: Messages				Help & Tools ?
Main View Settings Subs Docs Change Orders & Task Orders Alerts Comments Messages Closeout				
Compliance Audit List Compliance Audit Summary Compliance Audit FY Reviews Site Visits Reports				
100010001: Service contract Prime: B2Gnow Test Vendor 4 10/1/2012 - 12/31/2012				Status: Open Current Award: \$50,000 Total Paid: \$0 Goal: 0.00% % Credit: 0.00% For Credit: \$0

Messages ?			
Actions	Message	Date	From
View	Reviewing information This is to alert you to the need to review your information in the system.	9/30/2012	City of Houston Houston Admin7

Sending messages

When the system is used to send messages to other users, the contract stores a complete history with the record for future reference. Messages can be viewed at any time.

You can send messages as you navigate through a contract by clicking a contact's name if it displays as a hyperlink or using the Messages buttons that display at the bottom of a page.

Examples:

- When viewing an amendment, click the contact's name to send a message to that contact.

Contract Management: View Contract Amendment [Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#) | [Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

4600009807: Electric Supply Agreement between City of Houston and the Texas General Land Office, State Power Program. #C55805 (View Special Notes on Contract)
 Prime: Texas General Land Office
 4/14/2004 - 7/31/2013

Status: **Open**
 Current Award: **\$1,332,000,000**
 Goal: **15.00%** Total Paid: **\$918,884,083**
 % Credit: **12.84%** For Credit: **\$117,959,836**

An amendment to this contract has been posted.

Transaction Information	
Transaction Number	00373938-004
Contract Reference	00373938-001
Contact Person	Kim Nguyen
Posting Date & Time	Local: 8/14/2007 2:03:57 PM CDT System: 8/14/2007 2:03:57 PM CDT

- On the Subs page, use Message All or Message All Subs to send a message to contractors.

Contract Management: Subcontractor List [Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#) | [Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

TIP 800: Continental/United Airlines Airport Use & Lease Agreement at George Bush Intercontinental Airport (IAH)
 Prime: Continental/United Airlines
 8/11/2011 - 8/31/2014

Status: **Open**
 Current Award: **\$689,000,000**
 Goal: **30.00%** Total Paid: **\$0**
 % Credit: **0.00%** For Credit: **\$0**

[Add Subcontractor](#) Listed are the prime and subcontractors for this contract. Click [Add Vendor](#) to assigned more vendors, or click one of the **action** links to view, modify, delete, or deactivate a vendor.

Prime Contractor					
Vendor Name	Certified	Inc. in Goal	Diversity Audit	Final Pmnt	Actions
Continental/United Airlines	No	No		No	Select Action

Subcontractor Award Totals					
	Current Contract Goal	All Subs	Original Subs Towards Goal With Deductions	Current Subs Towards Goal With Deductions	Subs Towards Goal
Amounts	\$206,700,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Percentages	30.000%	0.000%	0.000%	0.000%	0.000%

Subcontractors

No subcontractors assigned to this contract.

[Print All Sub Letters](#) | [Print All Letters](#) | [Message All Subs](#)
[Message All](#) | [Outreach All](#)
[View Printable Vendor Checklist](#)
[Create Cert Tracking Log Records For All Contractors](#)

- When on the Compliance Audit Summary or Compliance Audit FY tabs, you can click the contact's name to send a message to that contact.

Contract Audit: Fiscal Year Audit Summary - 7/1/2012 to 6/30/2013 [Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)

[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

TIP 800: Continental/United Airlines Airport Use & Lease Agreement at George Bush Intercontinental Airport (IAH)
 Prime: Continental/United Airlines
 8/11/2011 - 8/31/2014

Status: **Open**
 Current Award: **\$689,000,000**
 Goal: **30.00%**
 % Credit: **0.00%**
 Total Paid: **\$0**
 For Credit: **\$0**

[<< View Previous Fiscal Year <<](#)
[>> View Next Fiscal Year Audit >>](#)

Audit Summary - 7/1/2012 to 6/30/2013

	Current Award	Award Percent	FY Payments	FY Payments Percent	Difference (Payments - Award)
Prime Contract	\$689,000,000.00		\$0.00		
For Credit	\$206,700,000.00	30.000%	\$0.00	0.000%	
For Credit to DBE Goal	\$0.00	0.000%	\$0.00	0.000%	
For Credit to MBE Goal	\$124,020,000.00	18.000%	\$0.00	0.000%	
For Credit to SBE Goal	\$82,680,000.00	12.000%	\$0.00	0.000%	
For Credit to WBE Goal	\$0.00	0.000%	\$0.00	0.000%	

Award values may not match due to differences between overall contract goal and subcontractor assignments.

Prime Contractor - 7/1/2012 to 6/30/2013

Prime Contractor	Cert	Inc. in Goal	Contracted Percent	FY Actual Percent	Prime's Share of Payments	FY Actual Payments TO Prime
Continental/United Airlines [Info] Layle McKelvey P 713-324-2462, F 713-324-3975 layle.mckelvey@coair.com	No	No	100.000%	0.000%	\$0.00	\$0.00

To send a message

- If necessary, open the contract from which you want to send a message.
- Navigate to one of the tabs or pages listed above.
- Depending on the page you accessed, click the contact's name, the **Message All** button, or the **Message All Subs** button.

4. In the **Message** field, enter the message, and then click **Review/Next**.

Messaging: Send Message [Help & Tools](#)

[Send a Message](#) [Contact Support](#) [Submit Feedback](#) [Report a Problem](#)

Enter the details of your message. Click **Review** to continue. The recipient list for this message has been saved, and you can add other recipients at any time.

*** required entry**

To (Users) (Clear Users)	Layle McKelvey, Continental/United Airlines (Remove)
To (Email) (Clear Emails)	
	Separate email addresses with commas.
Message Subject *	Message regarding Contract Audit for Contract TIP 800: Continental/United Airlines Airport L
Message *	
Attach File	Attach File Files will be attached to the system record and available for download from the system. A link to download the file from the system will be included in the notification to the recipient. The file will not be distributed by email or fax due to security restrictions.

5. Click **Send**.

WARNING: Sent messages cannot be deleted or recalled.

Managing contract reviews

On the **Contract Management: Reviews** page, you can view all of the reviews associated with the contract, if any.

Contract Management: Reviews [Help & Tools](#)

[Main](#) [View](#) [Settings](#) [Subs](#) [Docs](#) [Change Orders & Task Orders](#) [Alerts](#) [Comments](#) [Messages](#) [Closeout](#)

[Compliance Audit List](#) [Compliance Audit Summary](#) [Compliance Audit FY](#) [Reviews](#) [Site Visits](#) [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Total Paid: **\$0**
 For Credit: **\$0**
 Goal: **0.00%**
 % Credit: **0.00%**

Reviews [?](#)

No reviews found.

Managing site visit reports

On the **Contract Management: Site Visits** page, you can add details about a site visit and view and edit the details for existing site visits.

Contract Management: Site Visits [Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#) |

[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | **[Site Visits](#)** | [Reports](#)

100010001: Service contract
Prime: B2Gnow Test Vendor 4
10/1/2012 - 12/31/2012

Status: **Open**
Current Award: **\$50,000**
Total Paid: **\$0**
Goal: **0.00%**
% Credit: **0.00%**
For Credit: **\$0**

[Add Site Visit](#)

Site Visits (last 10 years) [?](#)

Actions	Visit Performed	Date	Contact
View Edit	✔	10/1/2012	KMP

To create a site visit report

1. If necessary, open the contract for which you want to add a site visit.
2. Click **Add Site Visit**.

3. In the **Site Visit Conducted** area, specify whether the site visit was completed.

Site Visit: Add Report

Help & Tools 

*** required entry**

Site Visit Information	
Site Visit Type	Contract site visit
Contract	4600009807 - Electric Supply Agreement between City of Houston and the Texas General Land Office, State Power Program. #C55805 (View Special Notes on Contract)
Site Visit Conducted *	☐ Yes (complete fields below) ☐ No, site visit was not required/performed
Site Visit Date	 (mm/dd/yyyy)
Person Conducting Site Visit	
Location(s)	

Site Visit Details	
Attach File(s)	Attach File
Comments 1	
Comments 2	
Comments 3	

4. To specify details about a site visit, complete the following:

Site Visit Date: Use the calendar selector to specify the date on which the site visit occurred.

Person Conducting Site Visit: Enter the name of the person who conducted the site visit.

Location(s): Enter location details.

Attach File(s): Use to attach documents, as necessary.

Comments 1, 2, 3: Enter additional comments, as necessary.

5. Click **Review**.
6. Click **Save**.

Running reports

On the **Contract Management: Report List** page, a list of reports you can generate for this contract displays. You can run the report by clicking a report title.

Contract Management: Report List

Help & Tools

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)

[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Total Paid: **\$0**
 For Credit: **\$0**
 Goal: **0.00%**
 % Credit: **0.00%**

Contracts

v2> [Subcontractor Invoice - Payment Tabulation](#)

Comparison of reported invoice and payment amounts.
 [Note: only relevant if invoice function is active.]

Closing contracts

On the Contract Management: Close Contract page, you can view contract details in preparation for closing a contract. If the payments have been reported and confirmed, and the contract is complete, you can use the fields to close the contract.

Contract Management: Close Contract

[Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)

[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Total Paid: **\$10,000**
 For Credit: **\$1,250**
 Goal: **0.00%**
 % Credit: **12.50%**

Contract Status

Contract Status	Open
Contract Secondary Status	None selected
Final Audit Indicated by Prime?	No

Close Contract

Close Date *	(mm/dd/yyyy)
Prime Contractor Rating	Not Rated

[Close Out Contract](#)
[View Audit Summary With 'Final Audit' Text](#)

Audit Summary - Total Contract

	Award	Award Percent	Payments	Payments Percent	Difference (Payments - Award)
Prime Contract	\$50,000.00		\$10,000.00		
For Credit	\$0.00	0.000%	\$1,250.00	12.500%	12.500% above goal
For Credit to DBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
For Credit to MBE Goal	\$0.00	0.000%	\$1,250.00	12.500%	12.500% above goal
For Credit to SBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
For Credit to WBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
Contract Progress	20.0%				
For Credit Progress	0.0%				
Total Unpaid Retainage	\$0.00				
Unpaid Retainage Percentage	0.000%				

Award values may not match due to differences between overall contract goal and subcontractor assignments.

Prime Contractor

Prime Contractor	Cert	Inc. in Goal	Contracted Percent	Actual Percent	Prime's Share of Payments	Actual Payments to Prime	Actions
B2Gnow Test Vendor 4 [Info] Justin Talbot-Stern P 602-325-9277, F 602-325-9277 b2gnowtest4@b2gnow.com	No	No	85.000%	87.500%	\$8,750.00	\$10,000.00	Print Letter

Click prime name to view payment history for this contract. Click contact person's name to send them a message.

Subcontractors

Subcontractor	Certified	Type	Inc. in Goal	Contracted Percent	Actual Percent	Actual Amount	Unpaid Retainage	Actions
 Sub Flooring, LLC [Info] Veronica Lopez sub@b2gnow.com P 602-325-9277, F 602-325-9277	No	Sub 100%	MBE	15.000%	12.500%	\$1,250.00	\$0.00	Print Letter

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

[Print ALL Subcontractor Close Out Letters](#)

When a contract is complete, it must be closed. A CCO can close a contract when necessary. Additionally, prime contractors can indicate on their audits that it is time for closeout. On the Dashboard, there is a row for Closeouts and Final Audits. Click the number to view the contracts for which a prime contractor indicated a final audit.

Contract Audits [Hide]	Last 30 days	Last 3 months	Last 12 months
Total Audits	3	7	8
Incomplete Audits »	1	1	1
Closeouts/Final »	1	1	1

TIP: An incomplete compliance audits must be cleared, along with any discrepancies, before a contract can be closed.

To close a contract

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Closeout** tab.
3. Click **Close Out Contract**.

Contract Status

Contract Status: **Open**
Contract Secondary Status: None selected ▼
Final Audit Indicated by Prime?: **No**

Close Contract

Close Date *: (mm/dd/yyyy)
Prime Contractor Rating: Not Rated ▼

Close Out Contract
View Audit Summary With 'Final Audit' Text

4. Click **OK** to confirm you want to close the contract.

Printing contract close letters

You can send Contract Close Letters to request verification from vendors or to notify parties that the contract was closed

To generate a single letter

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Closeout** tab.
3. Click the **Print Letter** hyperlink.

Subcontractors								
Subcontractor	Certified	Type	Inc. in Goal	Contracted Percent	Actual Percent	Actual Amount	Unpaid Retainage	Actions
B2Gnow Test Vendor 7 [Info] Waylon Smith b2gnowtestvendor7@b2gnow.com P 602-325-9277, F 602-325-9722		Sub 100%	MBE	20.000%	20.000%	\$20,000.00	\$0.00	Print Letter
Sub Flooring, LLC [Info] Veronica Lopez sub@b2gnow.com P 602-325-9277, F 602-325-9727		Sub 100%	SBE	20.000%	20.100%	\$20,100.00	\$0.00	Print Letter

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

4. Review and edit information, if necessary.

- Click **Print Letter** for the template you want to use.

Notification Templates & Formats		
Template	Hardcopy	Email
Contract Close	Print Letter Save Letter	☐ Send copy to you by email Send copy to another person No Template

To generate all letters

- If necessary, locate and open the contract.
- On the **Contract Management** page, click the **Closeout** tab.
- Click **Print All Subcontractor Close Out Letters**.

	Sub Flooring, LLC [Info] Veronica Lopez sub@b2gnow.com P 602-325-9277, F 602-325-9277	✓	Sub 100%	✓ SBE	20.000%	20.100%	\$20,100.00	\$0.00	Print Letter
--	---	---	-------------	----------	---------	---------	-------------	--------	------------------------------

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

- Click **OK** to confirm you want to print all letters.
- Click **Print Letters** for the template you want to use.

Notification Templates & Formats		
Template	Hardcopy	Email
Contract Close	Print Letters Save Letters	☐ Send copy of all messages to you by email No Template

NOTE: If you generate multiple letters at once, you cannot edit the data for an individual letter.

Sample Contract Close Letter

 CITY OF HOUSTON Office of the Mayor	Bill White _____ Mayor Velma Laws Director Affirmative Action and Contract Compliance Division P.O. Box 1562, Houston, Texas 77251-1562 T. 713.837.9000 F. 713.837.9050 www.houstonbc.gov
--	---

September 19, 2006

Marcus Tamez
Standard Cement Materials, Inc.
5710 West 34th Street, Suite A
Houston, TX 77092

FINAL MWDBE Monitoring Report

• Contract Number: **4600004581**
• Contract Title: **WW #4257-31 - Sanitary sewer rehabilitation by sliplining & pipebursting method. R0266-P6-3**
• Prime Contractor: **P M Construction & Rehabilitation, L. P.**

Dear Marcus Tamez:

The Affirmative Action and Contract Compliance Division's, Contract Compliance Section monitors MWDBE participation on all City of Houston's projects with MWDBE goals.

To assist our office in the monitoring process, please provide the information requested below and return this letter to the above address. **If you do not respond within five (5) days, we will accept the amount reported by your Prime contractor as the correct amount paid to your firm.**

- The amount reported by **P M Construction & Rehabilitation, L. P.** through the month of **September 2006 (FINAL)** is **\$14,126.56**.
- Please state the amount you have been paid as of today's date \$ _____
- Does the prime contractor owe your firm more? If so, how much? _____
- If this is your final payment, please indicate whether your firm was paid in full: _____
- Is your prime contractor currently withholding retainage? Yes _____ No _____
- How much retainage is being withheld? \$ _____
- When do you expect to receive it? _____

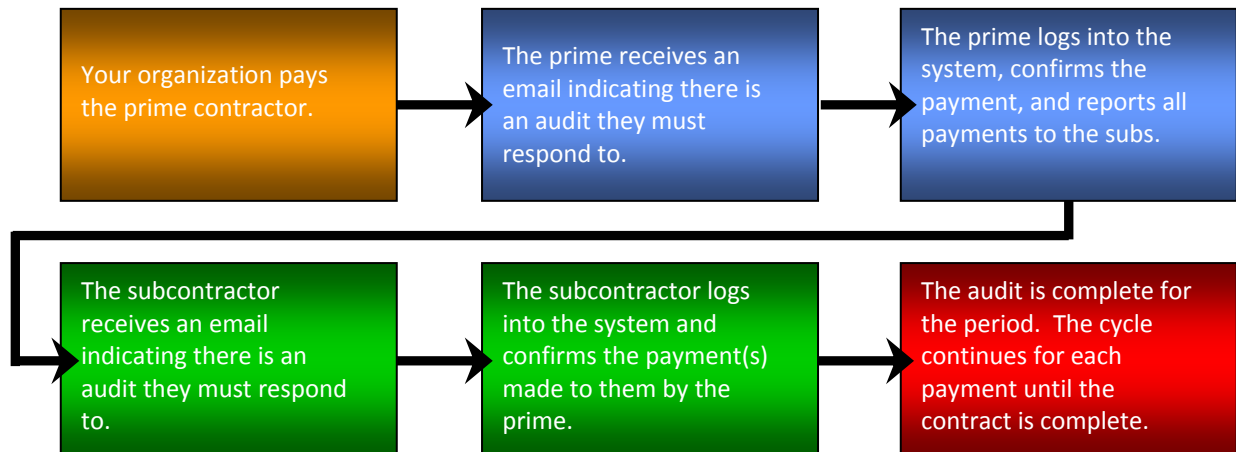
Zonia Davila Contract Compliance Officer	_____ Company Officer
---	--------------------------

Please review, sign and fax (713-837-9057) or send this final report back to me as soon as possible to close this project in a timely manner. If you have any questions or need assistance in this matter, please contact my office at 713-837-9004 or zonia.davila@cityofhouston.net.

Contract Compliance Payment Auditing

Understanding the audit process

After a contract has been created and your organization begins making payments to the prime contractor, the contract is ready for auditing. Contract settings determine whether audits are generated monthly, per payment, or on demand. The following image represents the audit process.



On the Compliance Audit Summary tab, you can view contract progress to date. The summary compares the awarded amounts to the actual payments. If the prime contractor meets or exceeds the contract goal, the progress bar is green. If the prime contractor misses the goal, the progress bar is red.

Viewing the Audit History

On the **Contract Management: Audit History** page, you can view all of the contract's compliance audits. You can also view the status for each audit, as well as the summary payment information for the prime contractor and subcontractors. Access additional payment information by clicking the hyperlink for the audit period.

Contract Management: Audit History

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4600009807: Electric Supply Agreement between City of Houston and the Texas General Land Office, State Power Program. #C55805 (View Special Notes on Contract)
 Prime: Texas General Land Office
 4/14/2004 - 7/31/2013

Status: **Open**
 Current Award: \$1,332,000,000
 Total Paid: \$918,884,083
 For Credit: \$117,959,836

Goal: 15.00%
 % Credit: 12.84%

Audit History													
Audit Period	Date Posted	Paid To Prime	Total Lines	Reported By Prime		Not Reported By Prime	Confirmed By Sub		Not Confirmed By Sub		Disputed By Sub		Actions
				Lines	Amount	Lines	Lines	Amount	Lines	Amount	Lines	Amount	
TOTALS		\$918,884,083	466	460	\$117,503,676	6	460	\$117,503,676	0	\$0	0	\$0	
Oct 2012	11/1/2012	Not reported	6	0	\$0	6	0	\$0	0	\$0	0	\$0	View Audit
Sep 2012	10/1/2012	\$10,858,804	6	6	\$503,044	0	6	\$503,044	0	\$0	0	\$0	View Audit
Aug 2012	9/3/2012	\$10,843,982	6	6	\$0	0	6	\$0	0	\$0	0	\$0	View Audit
Jul 2012	8/1/2012	\$7,187,383	6	6	\$0	0	6	\$0	0	\$0	0	\$0	View Audit
Jun 2012	7/2/2012	\$15,762,784	6	6	\$0	0	6	\$0	0	\$0	0	\$0	View Audit
May 2012	6/1/2012	\$10,847,706	6	6	\$1,187,120	0	6	\$1,187,120	0	\$0	0	\$0	View Audit
Apr 2012	5/1/2012	\$11,092,510	6	6	\$1,435,140	0	6	\$1,435,140	0	\$0	0	\$0	View Audit
Mar 2012	4/2/2012	\$10,644,362	6	6	\$1,848,528	0	6	\$1,848,528	0	\$0	0	\$0	View Audit
Feb 2012	3/1/2012	\$10,570,634	6	6	\$891,450	0	6	\$891,450	0	\$0	0	\$0	View Audit
Jan 2012	2/1/2012	Not reported	6	6	\$593,460	0	6	\$593,460	0	\$0	0	\$0	View Audit
Dec 2011	1/2/2012	\$10,835,249	6	6	\$2,020,956	0	6	\$2,020,956	0	\$0	0	\$0	View Audit
Nov 2011	12/1/2011	\$9,028,896	6	6	\$1,442,070	0	6	\$1,442,070	0	\$0	0	\$0	View Audit
Oct 2011	11/1/2011	\$14,505,970	6	6	\$1,441,440	0	6	\$1,441,440	0	\$0	0	\$0	View Audit
Sep 2011	10/3/2011	\$12,085,489	5	5	\$1,148,616	0	5	\$1,148,616	0	\$0	0	\$0	View Audit
Aug 2011	9/1/2011	\$13,785,198	5	5	\$0	0	5	\$0	0	\$0	0	\$0	View Audit
Jul 2011	8/1/2011	\$6,127,330	5	5	\$550,480	0	5	\$550,480	0	\$0	0	\$0	View Audit
Jun 2011	7/1/2011	Not reported	5	5	\$626,472	0	5	\$626,472	0	\$0	0	\$0	View Audit
May 2011	6/1/2011	\$10,870,754	5	5	\$1,494,360	0	5	\$1,494,360	0	\$0	0	\$0	View Audit
Apr 2011	5/2/2011	\$10,299,391	5	5	\$1,496,250	0	5	\$1,496,250	0	\$0	0	\$0	View Audit
Mar 2011	4/1/2011	\$11,743,480	5	5	\$663,780	0	5	\$663,780	0	\$0	0	\$0	View Audit
Feb 2011	3/1/2011	\$11,624,102	5	5	\$1,450,200	0	5	\$1,450,200	0	\$0	0	\$0	View Audit
Jan 2011	2/1/2011	\$6,870,501	5	5	\$915,012	0	5	\$915,012	0	\$0	0	\$0	View Audit
Dec 2010	1/3/2011	\$10,083,523	5	5	\$1,318,912	0	5	\$1,318,912	0	\$0	0	\$0	View Audit
Nov 2010	12/1/2010	\$10,097,139	5	5	\$1,479,660	0	5	\$1,479,660	0	\$0	0	\$0	View Audit
Oct 2010	11/1/2010	\$12,454,724	5	5	\$1,164,576	0	5	\$1,164,576	0	\$0	0	\$0	View Audit
Sep 2010	10/1/2010	\$8,363,111	5	5	\$575,568	0	5	\$575,568	0	\$0	0	\$0	View Audit
Aug 2010	9/1/2010	\$18,056,405	5	5	\$0	0	5	\$0	0	\$0	0	\$0	View Audit
Jul 2010	8/2/2010	\$2,128,674	5	5	\$1,431,570	0	5	\$1,431,570	0	\$0	0	\$0	View Audit
Jun 2010	7/1/2010	\$17,757,475	5	5	\$1,377,024	0	5	\$1,377,024	0	\$0	0	\$0	View Audit
May 2010	6/1/2010	\$10,028,507	5	5	\$624,000	0	5	\$624,000	0	\$0	0	\$0	View Audit
Apr 2010	5/3/2010	\$11,407,265	5	5	\$1,377,024	0	5	\$1,377,024	0	\$0	0	\$0	View Audit
Mar 2010	4/1/2010	\$12,849,454	5	5	\$1,531,064	0	5	\$1,531,064	0	\$0	0	\$0	View Audit
Feb 2010	3/1/2010	\$11,131,066	5	5	\$2,679,360	0	5	\$2,679,360	0	\$0	0	\$0	View Audit
Jan 2010	2/1/2010	\$12,675,339	5	5	\$0	0	5	\$0	0	\$0	0	\$0	View Audit
Dec 2009	1/1/2010	\$10,531,623	5	5	\$2,146,320	0	5	\$2,146,320	0	\$0	0	\$0	View Audit

In the Audit History area, items marked in red indicate that information is incomplete or there are discrepancies. The following audit summary displays the payment information for a specific time period.

To view audit history

1. If necessary, locate and open the contract.
2. From the **Contract Management** page, click the **Compliance Audit List** tab.

Viewing the Audit Summary

On the **Contract Audit: Audit Summary for Total Contract** page, you can view the total payments your organization paid to the prime contractor and the reported payments the prime contractor paid to the subcontractors. Based upon the status of each vendor, the contract goal(s) and actual participation rate(s) are compared in real-time. Certification information displays from the Certified Directory.

Contract Audit: Audit Summary for Total Contract

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100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Total Paid: **\$10,000**
 For Credit: **\$1,250**
 Goal: **0.00%**
 % Credit: **12.50%**

Audit Summary - Total Contract

	Current Award	Award Percent	Payments	Payments Percent	Difference (Payments - Award)
Prime Contract	\$50,000.00		\$10,000.00		
For Credit	\$0.00	0.000%	\$1,250.00	12.500%	12.500% above goal
For Credit to DBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
For Credit to MBE Goal	\$0.00	0.000%	\$1,250.00	12.500%	12.500% above goal
For Credit to SBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
For Credit to WBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
Contract Progress	20.0%				
For Credit Progress	0.0%				

Award values may not match due to differences between overall contract goal and subcontractor assignments.

Not Meeting Goal Letter

Prime Contractor - Total Contract

Prime Contractor	Cert	Inc. in Goal	Contracted Percent	Actual Percent	Prime's Share of Payments	Actual Payments TO Prime
B2Gnow Test Vendor 4 [Info] Justin Talbot-Stern P 602-325-9277, F 602-325-9277 b2gnowtest4@b2gnow.com	No	No	85.000%	87.500%	\$8,750.00	\$10,000.00

Click prime name to view payment history for this contract. Click contact person's name to send them a message.

Subcontractors - Total Contract

Subcontractor	Cert	Type	Inc. in Goal	Contracted Percent	Actual Percent	Actual Amount
 Sub Flooring, LLC [Info] Veronica Lopez sub@b2gnow.com P 602-325-9277, F 602-325-9277	No	Sub 100%	 MBE	15.000%	12.500%	\$1,250.00

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

If a prime contractor is not meeting the project's diversity goals, as listed in the Contract Settings area of the Contract: View page, the audit summary shows the payments made to subcontractors as "below goal." You can generate and send a letter to the prime contractor, notifying the contractor of the goals and expectations for the contract.

Audit Summary - Total Contract ?					
	Current Award	Award Percent	Payments	Payments Percent	Difference (Payments - Award)
Prime Contract	\$100,000.00		\$100,000.00		
For Credit	\$80,000.00	80.000%	\$250.00	0.250%	79.750% below goal
For Credit to DBE Goal	\$20,000.00	20.000%	\$0.00	0.000%	20.000% below goal
For Credit to MBE Goal	\$20,000.00	20.000%	\$0.00	0.000%	20.000% below goal
For Credit to SBE Goal	\$20,000.00	20.000%	\$250.00	0.250%	19.750% below goal
For Credit to WBE Goal	\$20,000.00	20.000%	\$0.00	0.000%	20.000% below goal
Contract Progress	100.0%				
For Credit Progress	0.3%				

Award values may not match due to differences between overall contract goal and subcontractor assignments.

Not Meeting Goal Letter

To view an audit summary

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Compliance Audit Summary** tab.

Viewing the Fiscal Year Audit Summary

On the **Contract Audit: Fiscal Year Audit Summary** page, you can view an audit summary for the contract's fiscal year, including payments made towards subcontractors for meeting the goals set forth in the contract.

Contract Audit: Fiscal Year Audit Summary - 7/1/2012 to 6/30/2013

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100010001: Service contract
 Prime: B2Gnow Test Vendor 4
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Total Paid: **\$10,000**
 For Credit: **\$1,250**
 Goal: **0.00%**
 % Credit: **12.50%**

Audit Summary - 7/1/2012 to 6/30/2013

	Current Award	Award Percent	FY Payments	FY Payments Percent	Difference (Payments - Award)
Prime Contract	\$50,000.00		\$10,000.00		
For Credit	\$0.00	0.000%	\$1,250.00	12.500%	12.500% above goal
For Credit to DBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
For Credit to MBE Goal	\$0.00	0.000%	\$1,250.00	12.500%	12.500% above goal
For Credit to SBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
For Credit to WBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched

Award values may not match due to differences between overall contract goal and subcontractor assignments.

Prime Contractor - 7/1/2012 to 6/30/2013

Prime Contractor	Cert	Inc. in Goal	Contracted Percent	FY Actual Percent	Prime's Share of Payments	FY Actual Payments TO Prime
B2Gnow Test Vendor 4 [Info] Justin Talbot-Stern P 602-325-9277, F 602-325-9277 b2gnowtest4@b2gnow.com	No	No	85.000%	100.000%	\$10,000.00	\$10,000.00

Click prime name to view payment history for this contract. Click contact person's name to send them a message.

Subcontractors - 7/1/2012 to 6/30/2013

Subcontractor	Cert	Type	Inc. in Goal	Contracted Percent	FY Actual Percent	FY Actual Amount
 Sub Flooring, LLC [Info] Veronica Lopez sub@b2gnow.com P 602-325-9277, F 602-325-9277	No	Sub 100%	 MBE	15.000%	12.500%	\$1,250.00

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

To view a fiscal year audit summary

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Compliance Audit FY** tab.

- If the contract spans multiple fiscal years, you can navigate to other years by clicking the **View Previous Fiscal Year** or **View Next Fiscal Year Audit** buttons.

Contract Audit: Fiscal Year Audit Summary - 7/1/2012 to 6/30/2013 [Help & Tools](#)

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4600009807: Electric Supply Agreement between City of Houston and the Texas General Land Office, State Power Program. #C55805 (View Special Notes on Contract)

Prime: Texas General Land Office
 4/14/2004 - 7/31/2013

Status: **Open**
 Current Award: **\$1,332,000,000**
 Total Paid: **\$918,884,083**
 Goal: **15.00%**
 % Credit: **12.84%**
 For Credit: **\$117,959,836**

[<< View Previous Fiscal Year <<](#)
[>> View Next Fiscal Year Audit >>](#)

Audit Summary - 7/1/2012 to 6/30/2013

	Current Award	Award Percent	FY Payments	FY Payments Percent	Difference (Payments - Award)
Prime Contract	\$1,332,000,000.00		\$28,890,169.14		
For Credit	\$199,800,000.00	15.000%	\$503,044.00	1.741%	13.259% below goal
For Credit to DBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
For Credit to MBE Goal	\$199,800,000.00	15.000%	\$503,044.00	1.741%	13.259% below goal

Managing Compliance Audits

To view a compliance audit

- On the **Contract Management: Audit History** page, click the **View Audit** hyperlink for the period for which you want to view payment information.
- To view the previous or next audit, click one of the buttons to advance to the previous or next pages.

Audit Information

Audit Time Period	August 2012
Audit Reference	Add Reference
System Audit Number	00703078-002
Date Posted	Local: 10/1/2012 8:31:03 AM CDT System: 10/1/2012 8:31:03 AM CDT
Final Audit?	No (mark audit as final)
Payment to Prime	\$23,250.00 (Edit)

[<< View July 2012 Audit <<](#)
[>> View September 2012 Audit >>](#)

Audit Summary - August 2012 and Totals To August 2012

	August 2012		Totals to August 2012	
	Payments	Percent	Payments	Percent
Contract Value & Goal		80.000%	\$100,000.00	80.000%
Prime Contract	\$23,250.00		\$69,250.00	
For Credit	\$100.00	0.430%	\$100.00	0.144%
For Credit to DBE Goal	\$0.00	0.000%	\$0.00	0.000%
For Credit to MBE Goal	\$0.00	0.000%	\$0.00	0.000%
For Credit to SBE Goal	\$100.00	0.430%	\$100.00	0.144%
For Credit to WBE Goal	\$0.00	0.000%	\$0.00	0.000%

Adding a missing audit

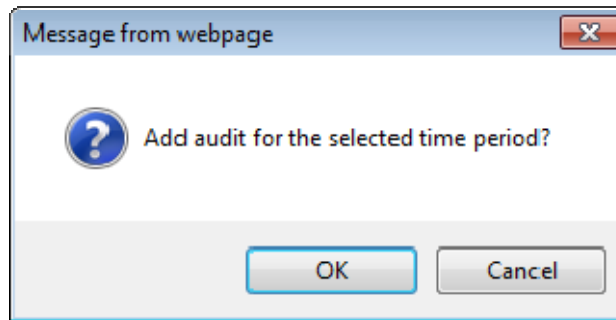
Depending upon the module configuration, you may need to manually add an audit. You must add the audit before you can add payment information.

To add an audit

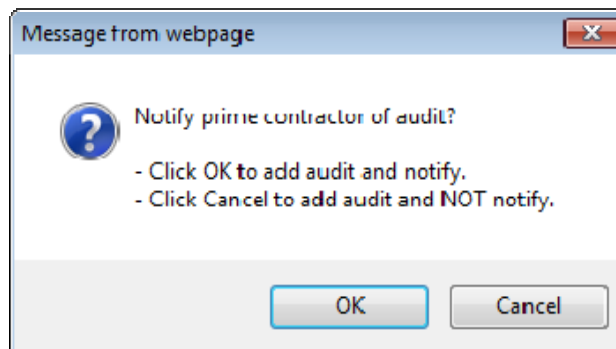
1. On the **Contract Management: Audit History** page, click the **Add Audit** hyperlink for the period for which you want to add audit information.

Audit History												
Audit Period	Date Posted	Paid To Prime	Total Lines	Reported By Prime		Not Reported By Prime	Confirmed By Sub		Not Confirmed By Sub	Disputed By Sub		Actions
				Lines	Amount	Lines	Lines	Amount	Lines	Amount	Lines	Amount
TOTALS		\$15,000	1	1	\$8,000	0	1	\$8,000	0	\$0	0	\$0
Oct 2012	10/1/2012	\$15,000	1	1	\$8,000	0	1	\$8,000	0	\$0	0	\$0
Sep 2012												
Aug 2012												

2. Click **OK** to verify you want to add the audit.



3. Specify whether you want to notify the prime contractor that you are adding an audit.



NOTE: If you click **OK**, the prime contractor receives an email notification instructing them to report the subcontractor payments. If you click **Cancel**, the prime contractor will not receive a notification, but the audit will be created.

Entering prime and sub contractor payment information

After adding a missing audit, you can enter payment data for the contract's prime and sub contractors. If your prime payment data is imported from your financial system, you do not need to manually enter it.

You can also edit payment information.

NOTE: If your payment data is imported, you receive a warning alert if you try to edit the prime contractor payment. You may continue, but you should determine why the payment amount is incorrect or missing before making any changes.

To add (or edit) prime contractor payment information

1. On the **Contract Management: Audit History** page, click the **View Audit** hyperlink for the period for which you want to add payment information.
The Contract Audit: Audit Summary page displays for the selected audit period.
2. In the **Payment to Prime** area, click the **Submit** hyperlink.

Contract Audit: Audit Summary for October 2012 [Help & Tools](#)

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4600009807: Electric Supply Agreement between City of Houston and the Texas General Land Office, State Power Program. #C55805 (View Special Notes on Contract) Status: **Open**
Prime: **Texas General Land Office** Current Award: **\$1,332,000,000**
4/14/2004 - 7/31/2013 Goal: **15.00%** Total Paid: **\$918,884,083**
% Credit: **12.84%** For Credit: **\$117,959,836**

Audit Information	
Audit Time Period	October 2012
Audit Reference	Add Reference
System Audit Number	00373938-104
Date Posted	Local: 11/1/2012 6:01:22 AM CDT System: 11/1/2012 6:01:22 AM CDT
Final Audit?	No (mark audit as final)
Payment to Prime	Not Reported (Submit)

[<< View September 2012 Audit <<](#)

NOTE: If prime payment information has already been imported from an external financial system, the link will be **Edit**.

3. In the **Amount** field, enter the payment information.

Audit Information	
Audit Time Period	September 2012
Audit Reference	Add Reference
System Audit Number	00703034-003
Date Posted	Local: 10/3/2012 6:00:06 AM CDT System: 10/3/2012 6:00:06 AM CDT
Final Audit?	No (mark audit as final)
Payment to Prime	Not Reported (Submit)
You can add the amount paid to the prime. Any changes will permanently replace information from your financial system. Amount For September 2012 * \$ 0.00 Payment Date (mm/dd/yyyy) Comments *	
Save Spell Check Clear Payment Info	

4. In the **Comments** field, enter information about the payment.
5. Click **Save**.
6. Click **OK** to confirm you want to add the payment.

To add subcontractor payment information

1. On the **Contract Audit: Audit Summary** page, in the **Subcontractors** area, click the **Edit** hyperlink.

Subcontractors - September 2012									
Subcontractor	Cert	Type	Inc. in Goal for Period	This Period	Confirmed By Sub	Total Payments to September 2012	Contracted Percent	Actual Percent	
 Sub Flooring, LLC [Info] Veronica Lopez sub@b2gnow.com P 602-325-9277, F 602-325-9277	No	Sub 100%	MBE	Not Reported Edit	--	\$0.00	15.000%	0.000%	

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

2. In the **Amount PAID** field, enter the payment information.

Audit Information ?

Enter the audit amount for the designated time period. You can attached files or add comments, if necessary.

Amount PAID For September 2012 * \$

>> Do NOT enter invoice amount.

Payment Date

>> Enter payment date if you made a payment during September 2012.
>> If multiple payments were made, enter the date of the first payment.

Payment Detail (Optional) Enter details of PAID check numbers and amounts for September 2012. This optional detail will speed up the subcontractors' confirmation of your payment information. This information will be displayed to Sub Flooring, LLC.

Attach File(s)

Comments These comments are visible ONLY to the contract contract compliance officer and prime contractor. They are not visible to Sub Flooring, LLC.

3. From the **Payment Date** calendar, select the date on which the payment was made.
4. Click **Review**.
5. If the information is correct, click **Save**.

Once each subcontractor has confirmed the payment, the audit is complete.

NOTE: In most cases, the prime contractor will report its subcontractor payments. The CCO needs to add or update subcontractor payments only if the prime is unable to do so.

Resolving a discrepancy

If a prime contractor and subcontractor disagree on an amount paid, the system creates a discrepancy. The system sends an email message to the vendors to notify them of the issue and request they self-resolve the discrepancy. If they are unable to resolve the discrepancy, the Contract Compliance Officer (CCO) may be required to take action.

To view the discrepancy, you access the Discrepancy Resolution screen, which displays contact information for the CCO, the prime, and the subcontractor. It is the vendor's responsibility to contact the CCO for assistance in resolving the discrepancy. The comments from the prime and the subcontractor are visible on this page. Timing of the billing cycle and payment reporting are the two most common causes of discrepancies.

When both parties agree to a resolution, they can complete the process themselves, or the CCO can finish the discrepancy resolution by clicking Resolve Discrepancy and then completing the form.

Your Dashboard displays total discrepancies.

Contract Audits [Hide]	Last 30 days	Last 3 months	Last 12 months
Total Audits	3	6	7
Incomplete Audits »	2	4	5
Discrepancies »	0	1	1

Click any number to view the list of discrepancies.

To **resort** click on column title. To **filter** click on the drop down menu. [Refresh Table](#)

Status	Audit Period	Contract #	Prime	Contract Title	Paid to Prime
Discrepancy ▾	Last 3 mos ▾		All ▾	All ▾	
1 Discrepancy	August 2012	100010002	B2Gnow Test Vendor 4		\$23,250.00
			Maintenance contract		

To access a discrepancy

- On the **Diversity User Control Panel: Contract Audits** page, in the **Audit Period** column, click the hyperlink for the time period you want to view.
The Contract Audit: Audit Summary page displays for the specified time period.
- In the **Subcontractors** box, click either **Resolve** link.

Subcontractors - August 2012								
Subcontractor	Cert	Type	Inc. in Goal for Period	This Period	Confirmed By Sub	Total Payments to August 2012	Contracted Percent	Actual Percent
 Sub Flooring, LLC [Info] Veronica Lopez sub@b2gnow.com P 602-325-9277, F 602-325-9277	No	Sub 100%	 SBE	\$100.00 Discrepancy Resolve Resolve		\$100.00	20.000%	0.144%

- Review the information and work with the parties to determine and resolve the situation.

Contract Audit: Discrepancy Resolution [Help & Tools](#)

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)
[Compliance Audit List](#) | [Compliance Audit Summary](#) | [Compliance Audit FY](#) | [Reviews](#) | [Site Visits](#) | [Reports](#)

100010002: Maintenance contract
Prime: B2Gnow Test Vendor 4
6/1/2012 - 12/31/2012

Status: **Open**
Current Award: **\$100,000**
Total Paid: **\$100,000**
Goal: **80.00%**
% Credit: **0.25%**
For Credit: **\$250**

A discrepancy has been reported for this audit for the listed time period. If the audit is pending a response, click the **Resolve Discrepancy** button to submit information.

[Resolve Discrepancy](#) | [August 2012 Audit](#) | [Subcontractor Payment History](#)

Discrepancy Resolution ?
Status **Awaiting prime and subcontractor response.**

Audit Information ?
Audit Time Period **August 2012**
Audit Number **00703078-002**

Original Audit Data Reported ?
Amount Reported by Prime **\$100.00** [Included in Goal \(change\)](#)
Amount Reported by Subcontractor **\$0.00**
Payment Date (Prime Reported) **8/31/2012**
Retainage Withheld? **No**
Subcontractor Private Comments **Not received.**

Discrepancy Resolution Data Reported ?
New Amount Reported by Prime **No response yet.**
New Amount Reported by Subcontractor **No response yet.**

Contract Compliance Officer Information ?
Contract Compliance Officer [Houston Admin7](#)
Organization **City of Houston**
User Number [30000001-004](#)
Email
Phone **713-837-9027**
Fax **713-837-9050**

Prime Information ?
Business Name [B2Gnow Test Vendor 4](#)
Vendor Number [20018259](#)
Contact [Justin Talbot-Stern](#)
Email [b2gnowtest4@b2gnow.com](#)
Phone **602-325-9277**
Fax **602-325-9277**

Subcontractor Information ?
Business Name [Sub Flooring, LLC](#)
Vendor Number [20009304](#)
Contact [Veronica Lopez](#)
Email [sub@b2gnow.com](#)
Phone **602-325-9277**
Fax **602-325-9277**

Prime Audit ?
Responder
Name [Houston Admin7](#)
Response Date **Local: 10/1/2012 8:33:37 AM CDT**
System: 10/1/2012 8:33:37 AM CDT

Subcontractor Audit ?
Responder
Name [Houston Admin7](#)
Response Date **Local: 10/1/2012 8:34:30 AM CDT**
System: 10/1/2012 8:34:30 AM CDT

Prime Discrepancy Response ?
Responder
Name **No response yet.**

Subcontractor Discrepancy Response ?
Responder
Name **No response yet.**

[Resolve Discrepancy](#) | [August 2012 Audit](#) | [Subcontractor Payment History](#)

- When the final data is complete, click **Resolve Discrepancy**.
- In the **Discrepancy Resolved** area, select an option, and if necessary, enter the final amount.

6. To include comments or files, enter or attach them, as needed.

Select a resolution option, enter comments if needed, and click **Save Response**.

Discrepancy Resolved? *

☒ The **\$100.00** originally reported by the prime is correct.

☐ The **\$0.00** originally reported by the subcontractor is correct.

☐ None of the amounts are correct. The amount should be \$

Public Comments

These comments are visible to all parties connected to this record.

Private Comments

These comments are visible ONLY to the contract compliance officer.

Attach File(s)

Confirmation

☐ Send me confirmation of my response.

7. Click **Save Response**.
8. Click **OK** to confirm you want to save the resolution information.

Audit management

There are four buttons on the contract audits that you can use to maintain your contract audits.

Mark Remaining Prime Entries as Zero – Indicates the prime contractor has not made any subcontractor payments or the remaining incomplete audit lines are \$0. Click the button to complete the audit lines with \$0.

Mark Unconfirmed Sub Entries as Confirmed – Indicates one or more subcontractors have not confirmed their payments. This button confirms all incomplete audit lines. If a subcontractor has completed work, edit the subcontractor record to indicate that the final payment was received. The subcontractor will not be included in future audits.

Submit All Incomplete Records – Allows you to bulk enter subcontractor payments. You can only use this function the first time a subcontractor payment is recorded. Payment edits must be done individually.

Extend Reporting Deadline by Two Weeks From Today – Extends the reporting deadline by two weeks. The prime contractor can enter payments and the subcontractors can confirm payments. The reporting time period varies depending on your organization's preference and is usually 15 to 90 days.

Extending a reporting deadline

When audit data becomes available for reporting, both prime contractors and subcontractors have a set amount of time to respond before the audit closes. The time period varies depending on your organization's preference and is usually 15 to 90 days. There are times when vendors will miss the reporting deadline or need to correct amounts they reported in previous months. Depending on your access rights, you can extend the reporting deadline in two week intervals to allow vendors to report their payments.

To extend the reporting period for one audit period

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Compliance Audit List** tab.
3. Click the **View Audit** hyperlink for the time period you want to extend.
4. Click **Extend Reporting Deadline By Two Weeks From Today**.

Submit ALL Incomplete Records **Extend Reporting Deadline By Two Weeks From Today**

Prime Contractor - June 2012								
Prime Contractor	Cert	Inc. in Goal	This Period	Prime's Share This Period	Total to June 2012	Prime's Share Total to June 2012	Contracted Percent	Actual Percent
B2Gnow Test Vendor 4 [Info] Justin Talbot-Stern P 602-325-9277 F 602-325-9277 b2gnowtest4@b2gnow.com	No	No	\$25,750.00 (Edit)	\$25,750.00	\$25,750.00	\$25,750.00	60.000%	0.000%

Click prime name to view payment history for this contract. Click contact person's name to send them a message.

Subcontractors - June 2012								
Subcontractor	Cert	Type	Inc. in Goal for Period	This Period	Confirmed By Sub	Total Payments to June 2012	Contracted Percent	Actual Percent
 Sub Flooring, LLC [Info] Veronica Lopez sub@b2gnow.com P 602-325-9277, F 602-325-9277	No	Sub 100%	SBE	Not Reported (Edit)	--	\$0.00	20.000%	0.000%

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

5. Click **OK**.

To extend the reporting period for all audits on the contract

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Compliance Audit List** tab.
3. Click **Extend Reporting Deadline By Two Weeks From Today**.

Sep 2012	10/1/2012	\$30,750	1	1	\$150	0	0	\$0	1	\$150	0	\$0	View Audit
Aug 2012	10/1/2012	\$23,250	1	1	\$100	0	1	\$100	0	\$0	0	\$0	View Audit
Jul 2012	10/1/2012	\$20,250	1	0	\$0	1	0	\$0	0	\$0	0	\$0	View Audit
Jun 2012	10/1/2012	\$25,750	1	0	\$0	1	0	\$0	0	\$0	0	\$0	View Audit

Mark ALL Remaining Prime Entries as Zero Mark ALL Unconfirmed Sub Entries as Confirmed

Extend Reporting Deadline By Two Weeks From Today

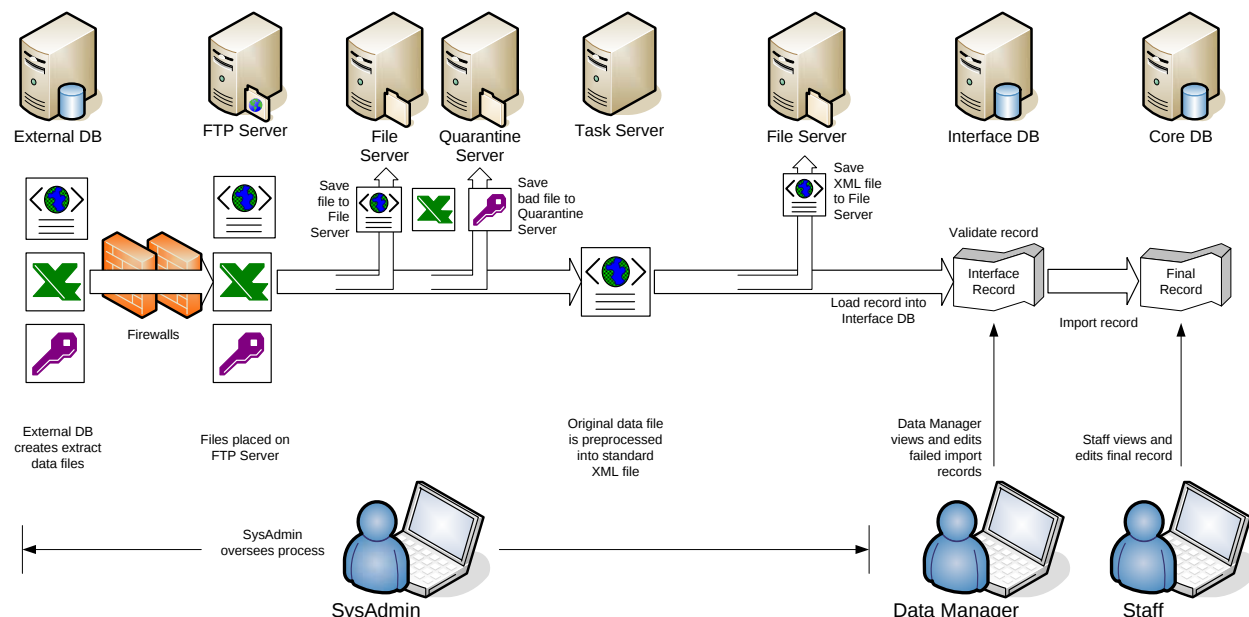
4. Click **OK**.

B2Gnow Data Import Process

If your organization's implementation includes an automated contract data interface with your financial system or project management system, data is imported on a regular basis into B2Gnow. However, external systems typically contain only a few data fields relevant to the contract compliance process, and it is necessary for staff to review and update the imported data.

NOTE: During the import process, the B2Gnow system will not overwrite any data that was manually entered or updated.

Data comes into B2Gnow from a wide range of systems in varied formats. The records must first be processed through a filter to ensure that they are correctly and consistently structured for the B2Gnow Import Engine.



Records are validated for required fields, data format, and field length, and they are rejected for a number of reasons. Once a contract or vendor record is added to the system, it is assumed that it is then controlled by a user and no further updates will be made to that record, except to flag specific changes relevant to the contract compliance process.

NOTE: Corrections to rejected data imported from an external system should be made in the source system to ensure that future data imports do not contain the same errors.

Importing Prime Contractors

The first step of importing a contract header is to add the prime contractor record to the database. The vendor record may already exist due to a prior import or manual entry; otherwise it must be added from the data file. If a prime contractor import record is rejected, the associated contract header record will also be rejected and not loaded until the prime record is corrected and imported.

Reasons for rejection

- Missing company name
- Missing contact information (email/fax)
- Missing contact person
- Missing FEIN
- Missing financial system vendor number
- Mismatched data with an existing record
- Same company with multiple duplicate records in external system

Correcting rejected prime contractors

If a prime contractor record is rejected, action must be taken to correct the data. The correction can be made in B2Gnow, the vendor record can be added manually, or the correction can be made in the external system and resubmitted in the next data file.

To correct the prime contractor data

1. From the **Tools** menu, open the **Data Management** sub-menu, and then click **Vendors**.
2. Adjust the **Date Imported Range**, and then click **Update Statistics**.

The Import Statistics box summarizes the results of data import.

Data Management: Imported Vendors

HELP VIDEO HELP

Date Imported Range		?
Start Date	10/1/2007  (mm/dd/yyyy) [leave blank for all records]	
End Date	 (mm/dd/yyyy) [leave blank for all records]	
Update Statistics		

Import Statistics		?
Total	1621	
Pending Processing	0	
Rejected	7	View Rejected Records
Imported (New Record)	419	
Already in System	1195	
Deleted	0	
Last Import Date	1/13/2008	

3. To view and correct rejected records, click **View Rejected Records**. If no link is visible, no records need correction.

The Imported Records List displays the relevant records.

- Adjust the **Date Imported Range**, resort the list, or change the filters to refine the list.

Data Management: Imported Records List[? HELP](#) [VIDEO HELP](#)

Date Imported Range: From To (Leave blank for all records)

1 - 7 of 7 records displayed: [Previous Page](#) < Page > [Next Page](#) Records per page

To **resort** click on column title. To **filter** click on the drop down menu. [Refresh Table](#) [Clear Filters](#)

Status	Actions	Delete	Record ID	Business Name	Location	Date Imported	System	
Rejected	☐	Delete		All			All	
All	View	Edit	☐	193852	ANCHOR GROUP, INC, THE	DALLAS, TX	10/17/2007	Oracle Primes
Rejected	View	Edit	☐	193803	AZTECA ENTERPRISES, INC	DALLAS, TX	10/17/2007	Oracle Primes
Deleted	View	Edit	☐	193832	C K WORLD SERVICES, INC	BEDFORD, TX	10/17/2007	Oracle Primes
Rejected	View	Edit	☐	193854	INTEGRATED ENVIRONMENTAL SOLUTIONS, INC.	RICHARDSON, TX	10/17/2007	Oracle Primes
Rejected	View	Edit	☐	193796	M/A-COM, INC.	LYNCHBURG, VA	10/17/2007	Oracle Primes
Rejected	View	Edit	☐	190604	ROBINSON INDUSTRIES, INC	DALLAS, TX	10/11/2007	Oracle Primes
Rejected	View	Edit	☐	193806	UNITED BUILDING MAINTENANCE, INC	DALLAS, TX	10/17/2007	Oracle Primes

- To view a record, click **View**.

The view page displays the entire vendor record and lists all errors with required and optional fields. Review the errors closely.

Data Management: Vendor Record View[? HELP](#) [VIDEO HELP](#)

Record Summary	
Business/Record Name	ROBINSON INDUSTRIES, INC
Record Status	Vendor record NOT imported; see errors.
System VendorID	

Upload Information	
Upload Type	Oracle Primes
Processing Date	Local: 10/11/2007 10:31:26 AM CDT System: 10/11/2007 10:31:26 AM CDT
Date Created	Local: 10/11/2007 10:35:05 AM CDT System: 10/11/2007 10:35:05 AM CDT
Date Imported	Local: 10/11/2007 11:02:33 AM CDT System: 10/11/2007 11:02:33 AM CDT

Errors	
Multiple duplicate records found for this vendor.	
DBA Name	No data [Optional].
DUNS Number	No data [Optional].
Reference Number 2	No data [Optional].
Reference Number 2 Name	No data [Optional].
Reference Number 3	No data [Optional].
Reference Number 3 Name	No data [Optional].
Company Email	No data [Optional].
Website	No data [Optional].
Physical Address 2	No data [Optional].
Physical Address 3	No data [Optional].
Mailing Address 2	No data [Optional].
Mailing Address 3	No data [Optional].
Contact Person Title	No data [Optional].
Contact Person Email	No data [Optional].
Business Type	No data [Optional].

Business Information	
Business Name	ROBINSON INDUSTRIES, INC
DBA Name	
Tax ID Number	
SSN	
DUNS Number	
Oracle VendorID	251473

Business Contact Information	
General Phone	2147441241
General Fax	2147441242
General Email	
Company Website	

Physical Address	
Address 1	1420 PRUDENTIAL DRIVE
Address 2	
Address 3	
City	DALLAS
State	TX
Zip	75235
Zip4	

- Click **Edit Record & Resubmit** to correct the record.
The list of errors is repeated for reference, followed by editable fields for every field on the vendor record.

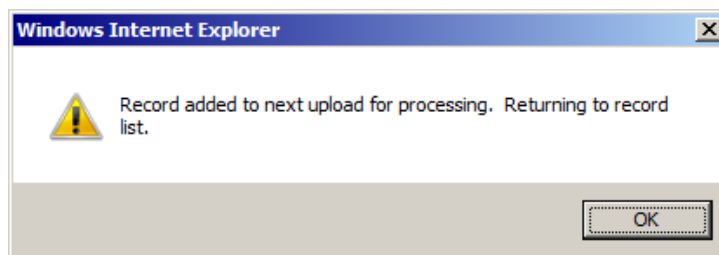
Business Information	
Business Name *	ROBINSON INDUSTRIES, INC
DBA Name	
Tax ID Number	
SSN	
DUNS Number	
Reference 1	
Name: Oracle VendorID	251473
Reference 2	
Name:	
Reference 3	
Name:	

Business Contact Information	
General Phone	2147441241
General Fax	2147441242
General Email	
Company Website	

Physical Address	
Address 1 *	1420 PRUDENTIAL DRIVE
Address 2	
Address 3	
City *	DALLAS
State *	TX
Zip *	75235
Zip4	

7. Correct the data and click **Resubmit Record**.

The record is validated and imported during the next hourly import cycle.



NOTE: If a rejected record is edited, care must be taken to resubmit the record with correct data. The system limits the entry of invalid data; however, organization-specific fields may require certain data formats that are not verified on screen. Invalid data could cause the record to be rejected again.

Some rejected records may not need to be addressed. Delete these records from the list to remove them from the rejected status count.

Vendor matching process

The vendor record in the data file is compared to the full vendor database using all available fields. A sophisticated algorithm compares the information, determines the possible matches, and scores the quality of each match. Certain fields, such as FEIN and financial system vendor number, result in very high scores. Matches on other fields, including email, phone, fax, business name, and address, result in low scores. A combination of low scoring fields, such as email, fax, and business name matched at the same time can generate a higher aggregate score. If a certain score threshold is reached, then the system has determined that the company is already in the database.

When a match is made, certain organization-specific fields are updated. However, general business and contact information, including business name, phone, fax, email, contact person, and address are **not** updated as this can potentially overwrite data that vendors or staff are updating themselves in the system.

If a match is not made and the vendor is new, it is added to the database.

Importing contract headers

The second step of importing a contract header is to add the contract record to the database. The contract record may already exist due to a prior import or manual entry. If not, it is added from the data file. Like the prime contractor record, the contract header record is assessed and can be rejected for certain data issues.

Reasons for rejection

- No contract title
- No start date
- No end date
- No value
- Prime contractor not in the system or could not be matched

Correcting rejected contract headers

If a contract header record is rejected, action must be taken to correct the data. The correction can be made in B2Gnow. The contract record can be added manually, or the correction can be made in the external system and resubmitted in the next data file.

To correct a contract header

1. From the **Tools** menu, open the **Data Management** sub-menu, and then click **Contracts**.
2. Adjust the **Date Imported Range**, and then click **Update Statistics**.
The Import Statistics area summarizes the results of data import.

Data Management: Imported Contracts

HELP VIDEO HELP

Date Imported Range	
Start Date	10/1/2007 (mm/dd/yyyy) [leave blank for all records]
End Date	(mm/dd/yyyy) [leave blank for all records]
Update Statistics	

Import Statistics		
Total	1679	
Pending Processing	0	
Rejected	33	View Rejected Records
Pending Import	133	View Pending Records
Failed Import	0	
Imported (New Record)	23	
Change Order	138	
No Change	1341	
Deleted	11	View Deleted Records
Last Import Date	1/13/2008	

3. To view and correct records, click any of the links. If no link is visible, no records need correction.

The Imported Records List displays the relevant records.

4. Adjust the **Date Imported Range**, resort the list, or change the filters to refine the list.

Date Imported Range: From 10/1/2007 To Refresh (Leave blank for all records)

1 - 10 of 33 records displayed: Previous Page < Page 1 > Next Page Records per page 10

To resort click on column title. To filter click on the drop down menu. Refresh Table Clear Filters

Status	Actions	Delete	Record ID	Contract Number	Contract Title	Prime	Contract Value	Start Date	End Date	Date Imported
Rejected	☐	Delete								
All	View	Edit								
Rejected	☐		11316	500026000	MULTILATERATION (MLAT) SYSTEM	FEDERAL AVIATION ADMIN/DEPT OF TRANS (FAA)	\$5,828,324.98	8/31/2001	12/4/2004	6/26/2008
Pending Import	☐		11315	703344000	INTERLINE BAGGAGE AND MAIL TRANSFER SERVICES	EVERGREEN AVIATION GROUND LOGISTICS ENTERPRISES, INC.	\$6,028,885.00	7/1/2002	9/29/2007	6/26/2008
Failed Import	☐		10401	703647000	INTERLOCAL AGREEMENT	TARRANT COUNTY COLLEGE		2/7/2005	2/6/2008	10/11/2007
Deleted	☐		10402	703817000	INTERLOCAL AGREEMENT FOR SURETY SUPPORT SERVICES	DALLAS, CITY OF		6/1/2006	6/30/2009	10/11/2007
Rejected	☐		10930	703846000	TRUCKING SERVICES FOR DISPOSAL OF DEICING FLUID	TAS ENVIRONMENTAL SERVICES LP	\$916,500.00	11/30/2006	11/29/2011	10/11/2007
Rejected	☐		10818	703852000	SALE OF SCRAP METAL MATERIALS	OKON METALS, INC		11/6/2006	11/5/2009	10/11/2007
Rejected	☐		10975	703852000	SALE OF SCRAP METAL MATERIALS	OKON METALS, INC		11/6/2006	11/5/2009	10/11/2007
Rejected	☐		10906	802066000	TIME AND ATTENDANCE SYSTEM SOFTWARE MAINTENANCE & SUPPORT	KRONOS, INCORPORATED	\$112,200.00	2/2/2006	2/1/2008	10/11/2007
Rejected	☐		11067	802175000	ENERGY REVERSE AUCTION SERVICES	WORLD ENERGY SOLUTIONS INC		2/1/2007	1/31/2010	10/17/2007
Rejected	☐		11301	802252000	IRREGULAR OPERATION PLANNING AND SUPPORT WORKSHOPS	AVIATION INNOVATION	\$50,000.00	11/1/2007	9/30/2008	1/13/2008

[View Summary](#) [Delete ALL Records](#)

5. To view a record, click **View**.

The view page displays the entire contract header record and lists all errors with required and optional fields. Review the errors closely.

Record Summary	
Record Status	Contract record NOT verified; see errors.
ContractID	N/A

Upload Information	
Upload Type	Oracle Contracts
Processing Date	Local: 10/11/2007 6:14:29 PM CDT System: 10/11/2007 6:14:29 PM CDT
Date Created	Local: 10/11/2007 6:16:28 PM CDT System: 10/11/2007 6:16:28 PM CDT
Date Verified	Local: 1/2/2008 4:36:00 PM CST System: 1/2/2008 4:36:00 PM CST

[Edit Record & Resubmit](#) [Delete Record](#) [Return To List](#)

Errors	
Buyer Info	No data (will attempt to use default user)
Maximum Value	No data (Required)
Default diversity staff used.	

Contract Data	
Title	SALE OF SCRAP METAL MATERIALS
Contract Value	

Reference Numbers	
Contract Number	703852000
Master Contract Number	
Oracle ContractID	277709

Contract Dates	
Date Start	11/6/2006
Date End	11/5/2009
Date Closed	
Date Notice To Proceed	11/6/2006
Date Approved	11/14/2006

- Click **Edit Record & Resubmit** to correct the record.

The list of errors is repeated for reference, followed by editable fields for every field on the vendor record.

*** required entry**

Record Summary	
Record Status	Contract record NOT verified; see errors.

Upload Information	
Upload Type	Oracle Contracts
Original Processing Date	Local: 10/11/2007 6:14:29 PM CDT System: 10/11/2007 6:14:29 PM CDT
Original Date Created	Local: 10/11/2007 6:16:28 PM CDT System: 10/11/2007 6:16:28 PM CDT
Original Date Verified	Local: 1/2/2008 4:36:00 PM CST System: 1/2/2008 4:36:00 PM CST

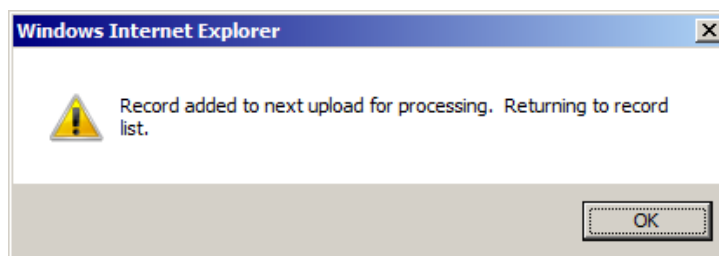
Errors	
Buyer Info	No data (will attempt to use default user)
Maximum Value	No data (Required)
Default diversity staff used.	

Contract Data	
Title *	SALE OF SCRAP METAL MATERIALS
Contract Value (\$) *	

Reference Numbers	
Contract Number *	703852000
Master Contract Number	
Reference 1 Name	Oracle ContractID
Reference 1	277709

- Correct the data and click **Resubmit Record**.

The record is validated and imported during the next hourly import cycle.



NOTE: If a rejected record is edited, care must be taken to resubmit the record with correct data. The system limits the entry of invalid data; however, organization-specific fields may require certain data formats that are not verified on screen. Invalid data could cause the record to be rejected again.

Some rejected records may not need to be addressed. Delete these records from the list to remove them from the rejected status count.

Contract matching process

The contract header record is matched to the contract database on a single field: contract number. If a match is not found, the contract is added to the system and marked as a “new record”. During processing, the contract header record is matched with the previously imported prime contractor record.

The fields present on a contract header are a small fraction of the data that is critical to the contract compliance process. It is important, therefore, to review the imported record and complete the “lock-in” process. This involves opening the record, correcting erroneous information, and adding any additional parameters that are relevant to the contract compliance process.

If a match is found, the algorithm determines if a critical change has been made to the contract header and updates the system accordingly. Critical changes to the contract header are changes in value and/or end date.

If the value of the contract has changed, it is likely due to a change order or amendment to the contract. The contract in the system will be flagged and the new value marked on the record, which may be more or less than the original value. The actual value on the contract will **not** be changed as the adjustment may involve other changes that are not detailed in the contract header data feed and must be manually addressed. Contract value changes are usually accompanied by a modification to the subcontractor utilization plan, which must be addressed on a case-by-case basis.

In addition, the end date may be adjusted due to the circumstances of the contract. This change may be associated with a value change.

On a regular basis, the Contract Compliance Officer (CCO) must review all new contracts, value change alerts, end date change alerts, and rejected records. All actions should be taken prior to the next loading of data to ensure that changes to records are done in a consistent manner.

NOTE: Once a contract record has been added to the system, future copies of that contract in the data feed are used **only** to assess value and end date changes. No other fields are assessed or updated. Furthermore, the import process never automatically updates any fields; changes are flagged for review by the CCO.

Locking in new contract records

New contract records in the system must be “locked in” before they can accept contract payments.

To view all new records

1. From the **View** menu, click **Contracts**.
2. From the **Actions** list, select **New Contract**.

Diversity User Control Panel: Contracts Help & Tools

[Contracts](#) | [Contract Audits](#) | [Workforce Audits](#) | [Concessions](#) | [Conc Audits](#) | [Outreach](#) | [Cert Apps](#) | [Cert Change Requests](#) | [Applications](#) | [Support](#) | [Messages](#)

Displays all contracts. Click the transaction number to view.

☒ Show ONLY contracts assigned to you

1 - 2 of 2 records displayed: [Previous Page](#) < Page 1 > [Next Page](#) Records per page 20

To resort, click on column title. [Refresh Table](#)

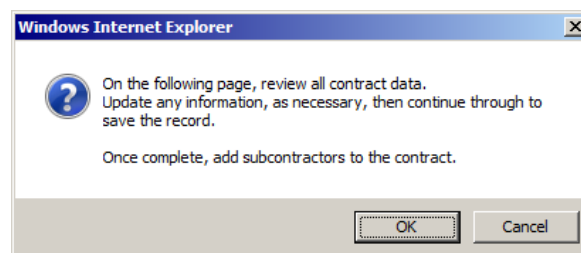
Actions	Alert	Status	Secondary Status	Contract #	Description	Prime	End Date	Amount
All		Open	All		All	All	All	
All		Open		100010002	B2Gnow Test Vendor 4 Maintenance contract		6/1/12 - 12/31/12	\$100,000.00
Amended		Open		100010001	B2Gnow Test Vendor 4 Service contract		7/2/12 - 12/31/12	\$25,000.00
New Value								
New End Date								
New Contract								
Locked In								
End within 3 mo.								
End within 6 mo.								
End within 12 mo.								

To lock in a new record

1. Click the contract title to view the record.
The second box displays all contract alerts in red. If the contract is a new record, the alert “Contract record is new and must be reviewed for accuracy” will be listed.
2. Click **review contract**.
An alert displays to provide instructional information.

Contract Alerts	
Alert 1	Contract record is new and must be reviewed for accuracy (review contract).
Alert 2	Goal is ZERO (edit , deactivate alert).
Alert 3	No SUBCONTRACTORS assigned to contract (assign , deactivate alert).
Alert 4	No CONTACT INFORMATION for prime contractor found (edit).

3. Click **OK**.
The contract edit page displays with the contract header data from the import auto-filled into the fields. Many fields will be blank or zero.



4. Review the entire record and update as needed. When finished, click **Review** at the bottom of the page.
5. When reviewing the data, do the following:
 - Verify contract title/description
 - Verify value of contract
 - Verify prime contractor
 - Verify (and change, if necessary) the buyer/project manager
 - Assign to a contract compliance officer
 - Add contract goals
 - Add funding sources and amount (important for DBE FTA/FAA/FHWA funded projects)
 - Verify audit settings
 - Add notes
 - Select/enter values for organization-specific fields
 - Attach electronic documentation
6. Review the record on the next page.
7. To make changes, click **Edit**.
8. To save the record, click **Save**.

Adding subcontractors

If the contract has certified or non-certified subcontractors, add them from the Subs tab. Subcontractors should be added before auditing commences. Refer to **Adding a subcontractor to a contract** for instructions.

Missing contact information for prime contractor

Sometimes the prime contractor record provided by the external system does not have contact information. To communicate with the prime contractor regarding contract compliance audits, the system *must* have a valid email (or fax, if fax service is selected) for the point of contact. If no contact information is found, an alert displays on the Contract Summary page.

Contract Alerts	
Alert 1	Contract record is new and must be reviewed for accuracy (review contract).
Alert 2	Goal is ZERO (edit , deactivate alert).
Alert 3	No SUBCONTRACTORS assigned to contract (assign , deactivate alert).
Alert 4	No CONTACT INFORMATION for prime contractor found (edit).

To update prime contractor contact information

1. Click the **edit** link in the alert.
The user edit page displays.
2. Complete the missing contact information and click **Save Changes**.

To view all contractors that are missing critical contact information, run the report: **Contracts Import - Contractors Missing Contact Information**. This report will list all contractors with current contact information for the assigned point of contact, the notification method selected, and the instructions to update the vendor account.

Business Name	Number of Contract Assignments	First Name	Last Name	Phone	Fax	Email	Notification Method	Resolution
1 NATION TECHNOLOGY	1	LARRY	SMITH	713-686-1897	713-686-6489		Fax only	Add email address and change notification method
1Crome/CTIS, Inc.	1 Contact	Person		972-574-8008			None	Add email address and change notification method; update contact name
3H Sign Systems	2 Contact	Person					None	Add email address and change notification method; update contact name
3i/Kwame JV	7 Bill	Dendy		214-231-0675	214-231-0675		Fax only	Add email address and change notification method
3M COMPANY, INC	1 SANDY	WHITBRED		800-553-1380			None	Add email address and change notification method
4 Imprint	1 Contact	Person					None	Add email address and change notification method; update contact name
A & A Enterprises	1 Contact	Person		972-574-8008			None	Add email address and change notification method; update contact name
A & A Industrial Supply	1 Contact	Person		972-574-8008			None	Add email address and change notification method; update contact name
A & B Fire Protection	1 Contact	Person		972-574-8008			None	Add email address and change notification method; update contact name
A & E Utilities	2 Contact	Person		972-574-8008			None	Add email address and change notification method; update contact name

Working with Certified, self-performing prime contractors

If a prime contractor is certified and will be counted towards the goal, the contract must be updated to reflect this status. For instructions, refer to **Certified, self-performing prime contractors** earlier in this chapter.

Editing records flagged with new values

The value of a contract is regularly adjusted up or down through change orders and amendments as the scope of the project changes. If the system detects a value change, the contract record is flagged for review. The original value will **not** be automatically updated as there are many reasons for the change and a manual review may be required.

To view all contracts with new values

1. From the **View** menu, click **Contracts**.
2. From the **Status** list, select **New Value**.

Diversity User Control Panel: Contracts

[Contracts](#) [Contract Audits](#) [Concessions](#) [Conc Audits](#) [Messages](#)

Displays all contracts. Click the transaction number to view.

☒ Show ONLY active contracts ☐ Show ONLY contracts assigned to you

1 - 6 of 6 records displayed: Previous Page < Page 1 > Next Page Records per page 20

To resort, click on column title. Refresh Table

Status	Contract #	Contract Title	Vendor Name	Finish Date	Contract Amount
New Value		All	All	Rest of Year	
All					
Amended					
New Value					
New End Date					
New Contract					
Expiring within 3 mo.					
Expiring within 6 mo.					
Expiring within 12 mo.					
New Value	950304000	ICP PHASE III COMPLETION PAVING AND UTILITIES	Azteca Enterprises, Inc.	6/25/08	\$3,991,988.08
Expiring within 3 mo.					
New Value	850240000	CONTRACTING AND GENERAL SERVICES (SMALL FIRMS)	Robinson Electrical Company, Inc.	9/30/08	\$7,185,302.68
Expiring within 6 mo.					
New Value	950258000	PERIMETER TAXIWAY - SOUTHEAST QUADRANT	W. W. Webber, Inc.	8/31/08	\$42,601,314.24
Expiring within 3 mo.					

To review and update a contract value change

1. Click the contract title.
The second box displays all contract alerts in red. The old and new contract values display.

Contract Alerts	
Alert 1	Contract value has changed according to your financial system (update value deactivate alert). Old value: \$42,601,314.24 New value: \$42,760,973.85

2. Research the change with the contracting department.
3. If the value change is a mistake, click **deactivate alert**. If the external system is not corrected, future imports may trigger the new value flag again.
4. If the value change is correct, click **update value**.

- Complete the amendment/change order form and save the record to update the contract value. This process also accounts for changes in the subcontractor utilization plan. Refer to **Submitting an Amendment/Change Order** for instructions.

NOTE: Do not edit the contract to change the value, except in cases where the value on the record is incorrect. The amendment/change order process captures important changes to the subcontractor utilization plan.

Editing records flagged with new end dates

The end date of a contract is often adjusted to reflect change orders and amendments as the scope of the project changes. If the system detects a value change, the contract record is flagged for review. The original value will **not** be automatically updated as there are many reasons for the change and a manual review may be required.

To view all contracts with new end dates

- From the **View** menu, click **Contracts**.
- From the **Status** list, select **New End Date**.

Diversity User Control Panel: Contracts

[Contracts](#) [Contract Audits](#) [Concessions](#) [Conc Audits](#) [Messages](#)

Displays all contracts. Click the transaction number to view.

☒ Show ONLY active contracts ☐ Show ONLY contracts assigned to you

1 - 1 of 1 records displayed: Previous Page < Page 1 > Next Page Records per page 20

To resort, click on column title. [Refresh Table](#)

Status	Contract #	Contract Title	Vendor Name	Finish Date	Contract Amount
New End Date		All	All	Rest of Year	
All	00	LEADERSHIP DEVELOPMENT PROGRAM	PEAK PERFORMANCE DEVELOPMENT	6/30/08	\$26,500.00

All
 Amended
 New Value
New End Date
 New Contract
 Expiring within 3 mo.
 Expiring within 6 mo.
 Expiring within 12 mo.

To review and update a contract end date

- Click the contract title.
The second box displays all contract alerts in red. The old and new end dates display.

Contract Alerts	
Alert 1	Contract value has changed according to your financial system (update value deactivate alert). Old value: \$26,500.00 New value: \$49,875.00
Alert 2	Contract end date has changed according to your financial system. (update value deactivate alert). Old date: 6/30/2008 New date: 12/31/2008

- Research the change with the contracting department.
- If the value change is a mistake, click **deactivate alert**. If the external system is not corrected, future imports may trigger the new end date flag again.
- If the end date change is correct, click **update end date**.

5. Complete the **Extend/Shorten Contract** form and save the record to update the contract end date.

Contract Management: Extend/Shorten Contract

 [HELP](#)  [VIDEO HELP](#)

Use this form to extend the contract. Select a new ending date that is later than the current ending date and click **Submit**. To cancel without saving any changes, click **Cancel**.

Contract Information

B2Gnow Transaction Number	00375497-001																																											
Current Ending Date	6/30/2008																																											
Extend contract until	6/30/2008	(mm/dd/yyyy)																																										
Note	← JUN 2008 → <table border="1"> <thead> <tr> <th>S</th><th>M</th><th>T</th><th>W</th><th>T</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr> <td>29</td><td>30</td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table> Cancel		S	M	T	W	T	F	S	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30					
S	M	T	W	T	F	S																																						
1	2	3	4	5	6	7																																						
8	9	10	11	12	13	14																																						
15	16	17	18	19	20	21																																						
22	23	24	25	26	27	28																																						
29	30																																											
Attach File(s)	Attach File Cancel																																											

NOTE: Do not edit the contract to change the end date, except in cases where the end date on the record is incorrect.

Processing contract value and end date changes

It is common that an amendment/change order involves both a contract value and end date change. In this situation, process both changes separately until all alerts on the records are cleared.

Multiple Record Updates

If changes to contracts are not reviewed and updated before the next import file is received, it is possible that another change made to the contract will be received in the next import. The system continues to use the original contract value and end date as the baseline comparison data, but it only retains the most recent import update. For example,

	<u>Import Data</u>	<u>System Value</u>	<u>Alert Flagged</u>	<u>Alert Value</u>
Original import and record lock-in	\$1,000,000	\$1,000,000	No	
First update import file	\$1,100,000	\$1,000,000	Yes	\$1,100,000
Second update import file	\$1,200,000	\$1,000,000	Yes	\$1,200,000
Contract change order submitted		\$1,200,000	No	

In the example, the flagged alert from the first update import file is not processed before the second file is received. Once the second import file is received, the record will be re-flagged and a new value of \$1,200,000 noted. The \$1,100,000 value will no longer be available in the database or visible on the screen.

In this situation, there are two options. The first is to submit a single amendment/change order that captures the entire value of all changes. The second is to submit an amendment/change order for each actual change. In either case, care must be taken to accurately reflect the actual subcontractor utilization plan after all changes are saved. In some implementations, a series of contract files will be loaded, resulting in multiple changes made on a contract record. Typically, a single amendment/change order will suffice to catch-up the record to the go-live point.

Viewing summary reports

To provide a snapshot of all contracts that require review, a summary report is available. The report, **Contracts Import - Imported Records for Processing**, will provide:

1. New contracts that require review and “lock-in”.

Contract Number	Description	Prime Contractor	Contract Value	Start Date	End Date	Import Date	CCO
4600004772	Sky Place Blvd Re-Alignment & Drainage	Jerdon Enterprise, L.P.	\$1,495,214.47	7/25/2006	7/25/2011	4/1/2008	Lisa Johnson
4600004875	38-00110: Bob Ross Senior Multi-Service Health & Resource Center	Williams & Thomas, LP	\$2,461,150.44	7/5/2006	7/5/2009	4/1/2008	Courtney McKinsey
4600004900	45-00005: Alamodome Steel & Cable Repainting; Hotel Motel Occupancy Tax	PECO ADMINISTRATION LLC	\$1,069,994.20	8/3/2006	8/3/2009	4/1/2008	Courtney McKinsey
4600004903	23-00983: Grandview Neighborhood Streets, Phase III-H; Hammond/ Amanda	FRANK L GRANT	\$24,097.00	9/1/2006	10/1/2008	4/1/2008	Courtney McKinsey
4600005012	Professional Program Management Services, Design Services, Pavement	PBS&J	\$4,814,685.00	8/28/2006	8/27/2012	4/1/2008	Courtney McKinsey
4600005344	Construction Materials Testing Services (FY 2007-09); Arias &	Arias & Associates, Inc.	\$400,000.00	10/24/2006	10/23/2007	4/1/2008	Courtney McKinsey
4600005515	Utility Relocation -Expansion Program	CPS ENERGY	\$256,537.48	1/9/2007	1/9/2017	4/1/2008	Courtney McKinsey
4600005516	Utility Relocation -Expansion Program	SOUTHWESTERN BELL	\$573,388.95	1/9/2007	1/9/2017	4/1/2008	Courtney McKinsey
4600005517	CityWide Public Art Mater Plan (October 2006 - September 2007)	FREEMAN/WHITEHURST GROUP LTD	\$88,000.00	10/1/2006	9/30/2007	4/1/2008	Courtney McKinsey
4600005518	23-00947: Main Plaza Redevelopment; District 1; Memorandum of Agreement	VIA METROPOLITAN TRANSIT	\$25,000.00	1/10/2007	2/1/2007	4/1/2008	Courtney McKinsey

2. Contracts that have been flagged with a value change.

Contract Number	Description	Prime Contractor	Original Contract Value	New Contract Value	Value Change	Import Date	CCO
702277000	COMPUTERIZED PARKING CONTROL SYSTEM(CPCS) HARDWARE AND SOFTWARE MAINTENANCE/SUPPORT	HEWLETT PACKARD CO	\$3,142,520.19	\$3,400,000.00	\$257,479.81	4/24/2008	John Smith
702660000	ORACLE GOVERNMENT FINANCIALS SYSTEM	ORACLE CORPORATION	\$5,880,239.87	\$6,121,799.87	\$241,560.00	4/24/2008	John Smith
703026000	BROKER OF RECORD-EXCESS WORKERS COMP INSURANCE	MCGRIFF, SEIBELS AND WILLIAMS OF TEXAS, INC	\$29,500.00	\$23,600.00	-\$5,900.00	4/24/2008	John Smith
703038000	RAC BUILDING MAINTENANCE	TRANE FACILITY SERVICES	\$1,947,132.35	\$1,634,768.52	-\$312,363.83	4/24/2008	John Smith
703276000	DPS CAD/RMS SYSTEM	COMPUADYNE PUBLIC SAFETY & JUSTICE, INC	\$1,520,262.00	\$1,677,215.00	\$156,953.00	5/21/2008	John Smith
703295000	AUTOMATED PARKING SYSTEM	FEDERAL APD	\$18,535,772.65	\$18,615,545.65	\$79,773.00	5/21/2008	John Smith
703300000	BENEFITS/PENSION ADMIN SOFTWARE MAINT SUPPORT SVCS	ORACLE USA	\$867,940.97	\$1,064,413.39	\$196,472.42	5/21/2008	John Smith
703344000	INTERLINE BAGGAGE AND MAIL TRANSFER SERVICES	EVERGREEN AVIATION GROUND LOGISTICS ENTERPRISES, INC.	\$5,742,400.00	\$6,028,885.00	\$286,485.00	10/11/2007	John Smith
703479000	MEDICAL SERVICES	HARRIS METHODIST HEB HOSPITAL	\$320,000.00	\$400,000.00	\$80,000.00	3/16/2008	John Smith
703505000	MAINT/SUPPORT SVCS-PERM NOISE MONITORING SYSTEM	BAE SYSTEMS INFORMATION & ELECTRONIC SYSTEMS INTEGRATION, INC.	\$1,283,067.00	\$1,542,722.00	\$259,655.00	3/16/2008	John Smith

3. Contracts that have been flagged with an end date change.

Contract Number	Description	Prime Contractor	Original End Date	New End Date	Change	Import Date	CCO
703295000	AUTOMATED PARKING SYSTEM	FEDERAL APD	4/12/2006	7/30/2007	474	5/21/2008	John Smith
703300000	BENEFITS/PENSION ADMIN SOFTWARE MAINT SUPPORT SVCS	ORACLE USA	9/30/2007	9/30/2008	366	5/21/2008	John Smith
703580000	MAINTENANCE SVCS-AIRPORT FACILITIES-LEVEL 1 SVCS	FMC TECHNOLOGIES INC. AIRPORT SERVICES	4/30/2009	2/28/2010	304	5/21/2008	Peggy Washington
901756000	REHABILITATE AIRFIELD PAVEMENTS-FY04	EAS Contracting, L. P.	10/26/2007	11/13/2007	18	5/21/2008	Peggy Washington

4. Contracts that were rejected during the import process.

Contract Number	Description	Prime Contractor	Contract Value	Start Date	End Date	Rejected Date	Errors
4600004661	Annual Contract Printing Library		\$10,208.16	10/1/2006	8/16/2007	5/27/2008	Prime contractor not found.
4600004955	Disposable Bags VALVE MASKS		\$20,000.00	10/1/2006	12/31/2008	5/27/2008	Prime contractor not found.
4600005159	MAINTENANCE SERVICE FOR GENERATOR	E.M.R. Inc.	\$105,000.00		9/30/2008	5/27/2008	No start date.
4600006006	28-031126 - Stinson Park Baseball Field-Lights		\$180,000.00	7/12/2007	4/30/2008	5/27/2008	Prime contractor not found.
4600006220	INDUSTRIAL GASOLINE & DIESEL ENGINE		\$260,000.00	10/1/2007	9/30/2008	5/27/2008	Prime contractor not found.
	25-016012 - The City's Owner-Occupied Housing Rehabilitation Program		\$2,035,618.00	7/24/2007	9/30/2009	5/27/2008	Prime contractor not found. No contract number.
4600006406	The Housing Neighborhood Service Department's Housing Program	TEHCO Inc.		10/10/2007	10/31/2008	5/27/2008	No contract value.
4600006412	28-033034 Planning and Community Development		\$437,148.00	10/1/2007	9/30/2008	5/27/2008	Prime contractor not found.
4600006455	28-033016 Empowerment Zone Outreach & Technical Assistance	Jerdon Enterprise, L.P.	\$76,176.00	10/1/2007		5/27/2008	No end date.
4600006920	McNeilus Model 3146 Parts & Service		\$10,500.00	2/5/2008	3/31/2009	5/27/2008	Prime contractor not found.
4600007010	23-00894: Ansley Blvd. Drainage #1901		\$16,508.55	10/17/2006	1/31/2009	5/27/2008	Prime contractor not found.

Imported contract payments

One of the biggest positive impacts on organization efficiency is B2Gnow's ability to update contract payments. Periodic import of payment data eliminates the need for staff to manually update records. B2Gnow automatically handles all aspects of contract compliance audit creation and payment update. Contract payments go through a validation and import process similar to the contract data feed, and records can be rejected for certain issues.

Reasons for rejection

- No payment date
- No payment amount
- No contract number

Editing rejected contract payments

If a contract payment is rejected, action must be taken to correct the data. The correction can be made in B2Gnow, the payment record can be added manually, or the correction can be made in the external system and resubmitted in the next data file.

To edit a rejected contract payment

1. From the **Tools** menu, click **Data Management**, and then click **Contract Payments**.

- Adjust the **Date Imported Range** and click **Update Statistics**.
The Import Statistics area summarizes the results of data import.

Data Management: Imported Contract Payments

[? HELP](#) [VIDEO HELP](#)

Date Imported Range	
Start Date	10/1/2007 (mm/dd/yyyy) [leave blank for all records]
End Date	(mm/dd/yyyy) [leave blank for all records]
Update Statistics	

Import Statistics	
Total	6167
Pending Processing	1
Rejected	0
Pending Import	324 View Pending Records
Failed Import	0
Imported	5841
Deleted	1 View Deleted Records
Last Import Date	1/13/2008

- To view and correct records, click any of the links. If no link is visible, no records need correction.
The Imported Records List displays the relevant records.
- Adjust the **Date Imported Range**, resort the list, or change the filters to refine the list.

Data Management: Imported Contract Payments Record List

[? HELP](#) [VIDEO HELP](#)

Date Imported Range: From 10/1/2007 To (Leave blank for all records) Refresh

1 - 10 of 324 records displayed: Previous Page < Page 1 > Next Page Records per page 10

To resort click on column title. To filter click on the drop down menu. [Refresh Table](#) [Clear Filters](#)

Status	Actions	Delete	Record ID	Payment Number	Contract Number	Payment Date	Amount	Date Imported
Pending Import	View Edit	☐	469834	950306000-659834-80953	950306000	12/1/2007	\$455,040.13	1/13/2008
Pending Import	View Edit	☐	469833	950304000-659991-78301	950304000	12/1/2007	\$438,327.12	1/13/2008
Pending Import	View Edit	☐	469807	850239000 SA No. 15-660189-78218	850239000 SA No. 15	12/1/2007	\$5,984.85	1/13/2008
Pending Import	View Edit	☐	469804	850233000 SA No. 10-659472-138892	850233000 SA No. 10	12/1/2007	\$205,327.86	1/13/2008
Pending Import	View Edit	☐	469797	850225000 SA No. 9-659896-137523	850225000 SA No. 9	12/1/2007	\$10,632.31	1/13/2008
Pending Import	View Edit	☐	469802	850225000 SA No. 18-659894-137523	850225000 SA No. 18	12/1/2007	\$305.38	1/13/2008
Pending Import	View Edit	☐	469801	850225000 SA No. 17-659734-137523	850225000 SA No. 17	12/1/2007	\$3,755.72	1/13/2008
Pending Import	View Edit	☐	469800	850225000 SA No. 15-659735-137523	850225000 SA No. 15	12/1/2007	\$8,185.45	1/13/2008
Pending Import	View Edit	☐	469788	802257000-660224-563778	802257000	12/1/2007	\$9,200.00	1/13/2008
Pending Import	View Edit	☐	469786	802231000-660471-629781	802231000	12/1/2007	\$792.00	1/13/2008

5. To view a record, click **View**.

The view page displays the entire vendor record and lists all errors with required and optional fields. Review the errors closely.

Record Summary ?	
Record Status	Payment record verified successfully, but not imported yet. Either the contract is not present in the system, the audit is already locked for the time frame, or the contract is closed.
Contract AuditID	N/A

Upload Information ?	
Upload Type	Oracle Contract Payments
Processing Date	Local: 1/11/2008 6:24:09 PM CST System: 1/11/2008 6:24:09 PM CST
Date Created	Local: 1/13/2008 1:48:37 AM CST System: 1/13/2008 1:48:37 AM CST
Date Verified	Local: 1/13/2008 6:05:10 PM CST System: 1/13/2008 6:05:10 PM CST

[Edit Record & Resubmit](#)[Delete Record](#)[Return To List](#)

Errors ?	
Date Invoiced	No data (Optional)
Date Received	No data (Optional)
Date Approved	No data (Optional)
Fiscal Year	No data (Optional)
Fiscal Quarter	No data (Optional)
Fiscal Month	No data (Optional)
Record Action	No data [Optional]
Line Action	No data [Optional]
Account Code	No data [Optional]
Invoice Number	No data [Optional]
Invoice Line Number	No data (Optional)

Payment Data ?	
Payment Number	950306000-659834-80953
Payment Line Number	377
Contract Number	950306000
Purchase Order Number	659834
Amount	455040.13

6. Click **Edit Record & Resubmit** to correct the record.

The list of errors are repeated for reference, followed by editable fields for every field on the vendor record.

*** required entry**

Record Summary	
Record Status	Payment record verified successfully, but not imported yet. Either the contract is not present in the system, the audit is already locked for the time frame, or the contract is closed.

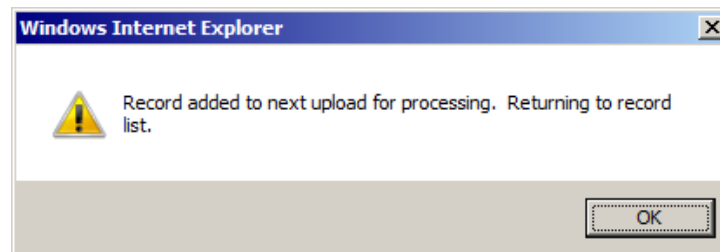
Upload Information	
Upload Type	Oracle Contract Payments
Original Processing Date	Local: 1/11/2008 6:24:09 PM CST System: 1/11/2008 6:24:09 PM CST
Original Date Created	Local: 1/13/2008 1:48:37 AM CST System: 1/13/2008 1:48:37 AM CST
Original Date Verified	Local: 1/13/2008 6:05:10 PM CST System: 1/13/2008 6:05:10 PM CST

Errors	
Date Invoiced	No data (Optional)
Date Received	No data (Optional)
Date Approved	No data (Optional)
Fiscal Year	No data (Optional)
Fiscal Quarter	No data (Optional)
Fiscal Month	No data (Optional)
Record Action	No data [Optional]
Line Action	No data [Optional]
Account Code	No data [Optional]
Invoice Number	No data [Optional]
Invoice Line Number	No data (Optional)

Payment Data	
Payment Number *	950306000-659834-80953
Payment Line Number	377
Contract Number *	950306000
Purchase Order Number	659834
Payment Amount (\$) *	455040.13
Date Invoiced	(mm/dd/yyyy)
Date Received	(mm/dd/yyyy)

7. Correct the data and click **Resubmit Record**.

The record will be validated and imported during the next hourly import cycle.



NOTE: If a rejected record is edited, care must be taken to resubmit the record with correct data. The system limits the entry of invalid data; however, organization-specific fields may require certain data formats that are not verified on screen. Invalid data could cause the record to be rejected again.

Some rejected records may not need to be addressed. Delete these records from the list to remove them from the rejected status count.

Contract payment matching process

Validated contract payments are matched to their contracts using the contract number on both records. If the contract header is missing a contract number or there is a discrepancy between the contract number on the contract header and payment record, the payment will not be matched.

Contract compliance audits

If payments are provided for a time period that does not have an existing contract compliance audit in the system, a new audit record is created. This process continues as long as the contract is open. Upon contract close, no further audits are created.

NOTE: Audits are not automatically created on a contract when:

- the contract is new and has not yet been “locked-in”
- the contract has been closed and is no longer accepting audit data

Handling payment detail and multiple payments

Once a match has been made with an existing contract and the import process has confirmed that an audit exists, the payment data is added to the audit record.

Monthly Audit Period

If a contract is configured for a monthly audit period, all payments during the month are aggregated and added to the audit as a single number. The payment detail is included as part of the record. In the example, three payments were made on the contract during the month. The audit is updated with a total paid amount of \$45,599.86, and the three payments are added to the detail record. The final date of payment is noted on the audit as March 28.

	<u>Amount</u>	<u>Date</u>
Payment #1	\$7,196.95	March 21
Payment #2	\$1,079.51	March 25
Payment #3	\$37,323.60	March 28
Total for Audit	\$45,599.86	March 28

Financial System Data							
Date Paid	Amount	Payment Number	PO Number	Invoice Number	Date Invoiced	Date Received	Date Approved
3/21/2008	\$7,196.75	5100146635	0000101187	000304500036587		3/20/2008	3/20/2008
3/25/2008	\$1,079.51	5100147334	0000101187	000304500036599		3/24/2008	3/24/2008
3/28/2008	\$37,323.60	5100148465	0000101187	000304500036584		3/27/2008	3/27/2008
Total Paid:	\$45,599.86						

Per Payment Audit Period

If a contract is configured to audit each payment, an audit is created for every payment regardless of the value. In this circumstance, the example above would instead generate three contract compliance audits, each on its own date with an amount matching the payment.

	<u>Amount</u>	<u>Date</u>
Payment #1	\$7,196.75	March 21
Total for Audit #1	\$7,196.75	March 21
Payment #2	\$1,079.51	March 25
Total for Audit #2	\$1,079.51	March 25
Payment #3	\$37,323.60	March 28
Total for Audit #3	\$37,323.60	March 28

Ignored contract payments

Once payment information has been added to a contract compliance audit, no further automated updates to that audit will be accepted by the system. Further payments for that time period are ignored. If a payment is added manually to an audit prior to the automated import of payment data, the manual addition will lock out the imported data.

If a contract is closed, new payments are ignored. Therefore, it is important to close a contract only when all expected payments have been reported. If there is a payment after the close date, it is necessary to manually update the record.

Using the Payments Not Imported report

To provide a snapshot of all payments that were not imported, run the **Contracts Import - Contract Payments Not Imported** report. It details total payments against each contract not imported due to:

- Missing contracts
- Already locked audits
- Closed contracts

If further payments are received but not imported, the amounts are incremented automatically after each import cycle.

From the report, an example of payments made on contracts not currently in the system:

Contract Number	Amount
802203000	\$1,200,400.00
950306000	\$630,941.00
850243000	\$400,807.00
703743000	\$186,748.00
703819000	\$150,000.00
802026000	\$125,312.00
703960000	\$78,045.00
802230000	\$75,000.00
703786000	\$73,059.00
703700000	\$53,802.00

From the report, an example of payments made on contracts currently in the system, but either the contract is closed or the payment information has already been manually entered:

Contract Number	Amount	Contract Title	CCO
950304000	\$438,327.00	ICP PHASE III COMPLETION PAVING AND UTILITIES	Michael Johnson
703820000	\$432,521.00	GASOLINE, DIESEL AND BIODIESEL FUEL	Pamela Ross
703635000	\$199,947.00	GAS TRANSPORTATION AND DISTRIBUTION	Pamela Ross
703780000	\$197,041.00	MAINTENANCE SUPPORT FOR CISCO SWITCHES	Pamela Ross
703775000	\$100,548.00	CPCS PARKING CONTROL TICKETS	Pamela Ross
703797000	\$73,628.00	ON-LINE INFORMATION SUBSCRIPTION SERVICES	Pamela Ross
703808000	\$52,360.00	MICROSOFT PREMIER SUPPORT SERVICES	Pamela Ross
703652000	\$48,076.00	ANNUAL LEASE OF POLICE MOTORCYCLES	Pamela Ross
802078000	\$39,900.00	D/M/WBE CONTRACT REPORTING SYSTEM	Suzanne Ruley
703680000	\$29,780.00	PUBLIC RELATIONS NEWS RELEASE SERVICES	Suzanne Ruley

Using the Data Import Checklist

It is important to regularly review and update the imported data. After each import cycle, use the following checklist to ensure that that all information is up-to-date.

1. Review rejected prime contractor records and correct for re-import.
2. Run **Contracts Import - Imported Records for Processing** report for a complete listing of all imported and rejected contract records.
3. Review rejected contract header records and correct for re-import.
4. Lock in all new contract header records and add subcontractors.
5. Run **Contracts Import - Contractors Missing Contact Information** report and update vendor records as instructed.
6. Research contracts with new values and create change orders/amendments as required.
7. Research contracts with new end dates and create change orders/amendments as required.
8. Review rejected contract payment records and correct for re-import.
9. Run **Contracts Import - Contract Payments Not Imported** report and add contracts that are missing from the system.