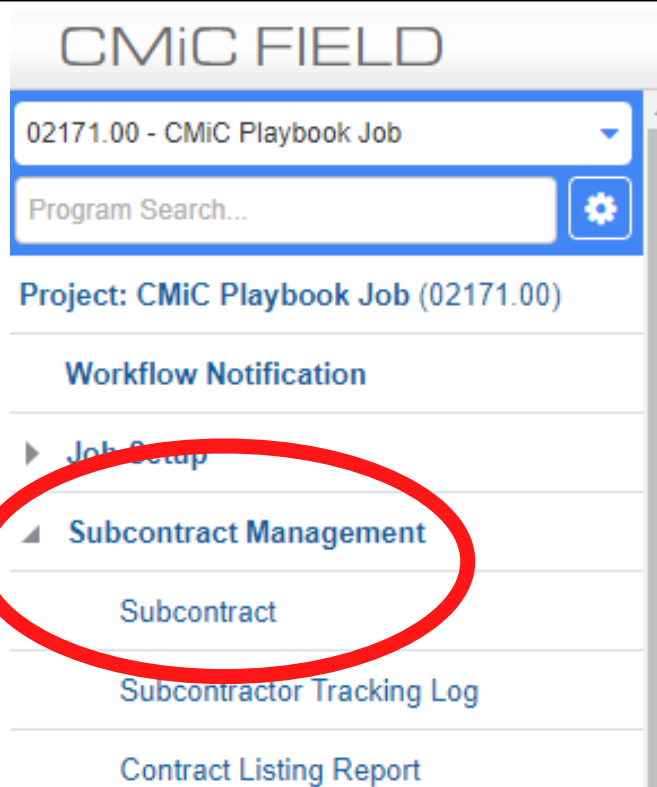


Module 6: Create a subcontract

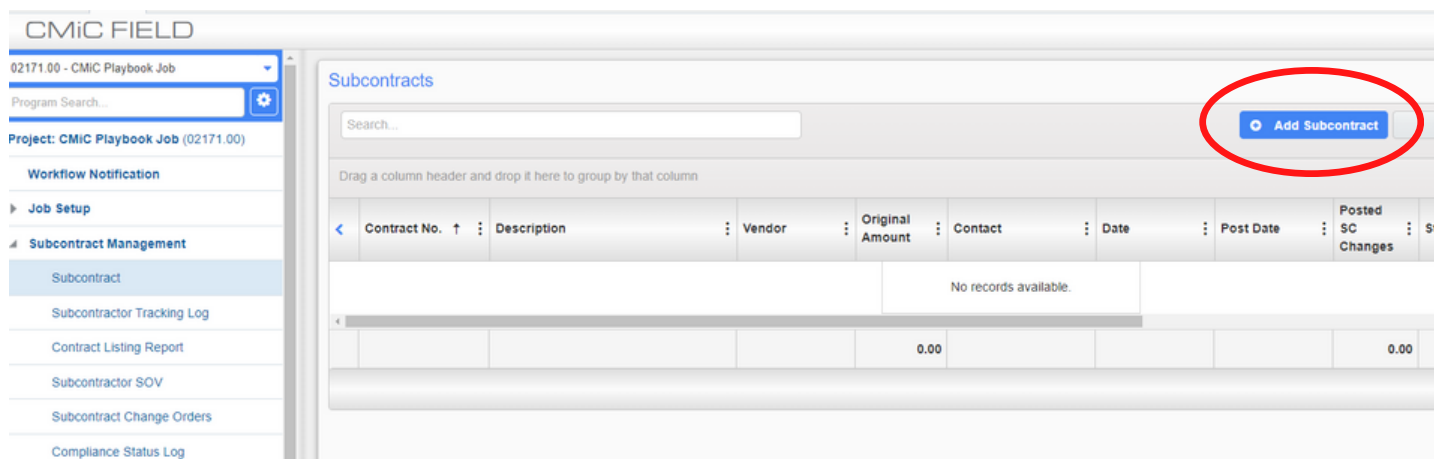
1

- After logging into CMiC, click on the **blue Field button**.
- Click on "Subcontract Management"
- Click on "Subcontract"



2

- Click on "Add Subcontract"
*This is a blue box on the right hand side of the screen



Module 6: Create a subcontract

3

- Choose the "Vendor" by clicking the magnifying glass
*NOTE: Click on "ALL" to search for vender
- Add a description in the "Description" box
- Confirm date

The screenshot shows the 'Subcontract Detail' form on the left and a 'Vendor List' table on the right. In the form, the 'Vendor' field has a magnifying glass icon circled in red, and the 'Description' field is also circled in red. The 'Vendor List' table has a search filter 'Find: pa%' and a dropdown menu showing '1 - 21 of 21'. The 'All' radio button is circled in red. The table lists vendors with columns for Abbrev, Code, Name, Prequal Status, Approval Status, and Order #.

Abbrev	Code	Name	Prequal Status	Approval Status	Order #
04081	04081	Patrick Costello			
04206	04206	Patricia Palmiere			
09753	09753	Paul Spadaccini			
11934	11934	Patrick J. Kennedy & Sons Inc			39 Gibl Dorche
12278	12278	Paul Mc Donald			

4

- Scroll down to Accounting
- Confirm
 - Invoiced
 - Default Retainage %

The screenshot shows the 'Accounting' section of the subcontract form. It includes a dropdown menu for 'Invoiced' set to 'Via - Subcontract', a text field for 'Default Retainage %' set to '10', and a checkbox for 'SOV Level Retainage Release' which is checked.



Module 6: Create a subcontract

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- **Scroll down to "User Defined" and confirm:**
 - **"Monthly Billing Date"**
 - **% Markup**
 - **% Markup - Sub-Subcontractor Work Performed**

User Defined

Master Agreement



% Markup - Work Performed ★

Monthly Billing Date ★

% Markup - Sub-Subcontractor Work Performed ★

6

- **Click the magnifying glass and identify**
 - **Payment and Performance Bond**
 - **Scope Details**

Payment and Performance Bond ★



Scope Details ★



Module 6: Create a subcontract

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- Scroll down to "Schedule of Values"
- Click the blue "+"

Schedule of Values

Action	☐ Delete	* Task Code
+ -	☐	
+		

8

- Task Code - Input the subcontract line number
*NOTE: In most cases, this will be "01"
- Task Name - Type in the line description

Schedule of Values

Action	☐ Delete	* Task Code	Seq	Task Name
+ -	☐			
+				



Module 6: Create a subcontract

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- **Use the magnifying glass to identify:**
 - **W/M** - In most cases this will be "LS"
 - **Amount** - Type in the dollar amount

Schedule of Values

Seq	Task Name	* W/M	Unit	Rate	Amount
	Painting	LS		0	1120.00

- **Scroll to the right to complete the line information:**
 - **Job** - Select the project number if it does not auto populate
 - **Phase** - Select the phase code
 - **Category** - Select the category code

***Note: this should be "S" for all subcontractor costs**

* Job	* Phase	* Category
02171.00	090190.91	S



Module 6: Create a subcontract

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- **Scroll down to "Key Dates"**
- **Input**
 - **Start Date**
 - **End Date**
 - **Issued Date**

Key Dates

Start Date	020123	
End Date	022823	
Issued Date	022123	
Received Date		
Executed Date		

11

- **Click "Save"**

LEEKENC1-JLIU

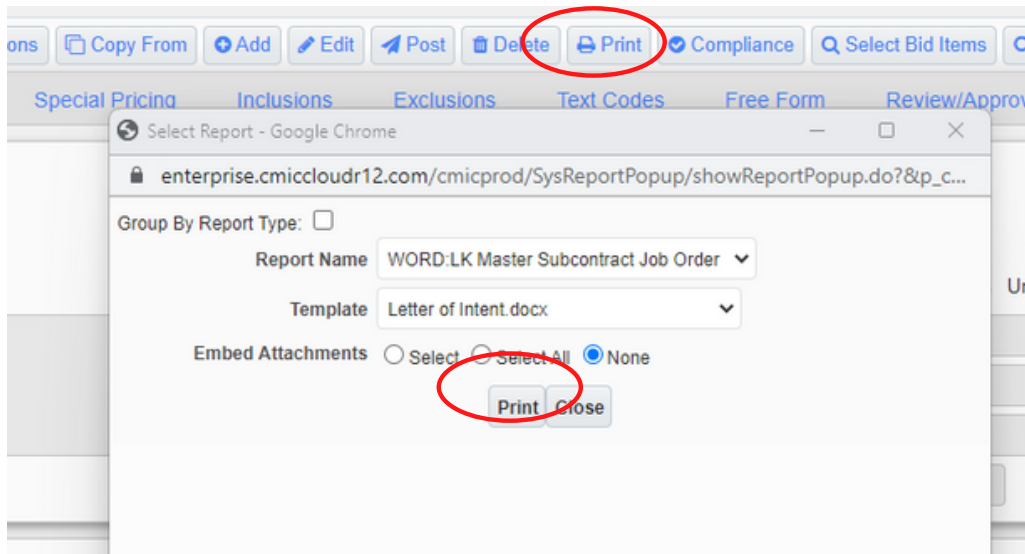
Review/Approval



Module 6: Create a subcontract

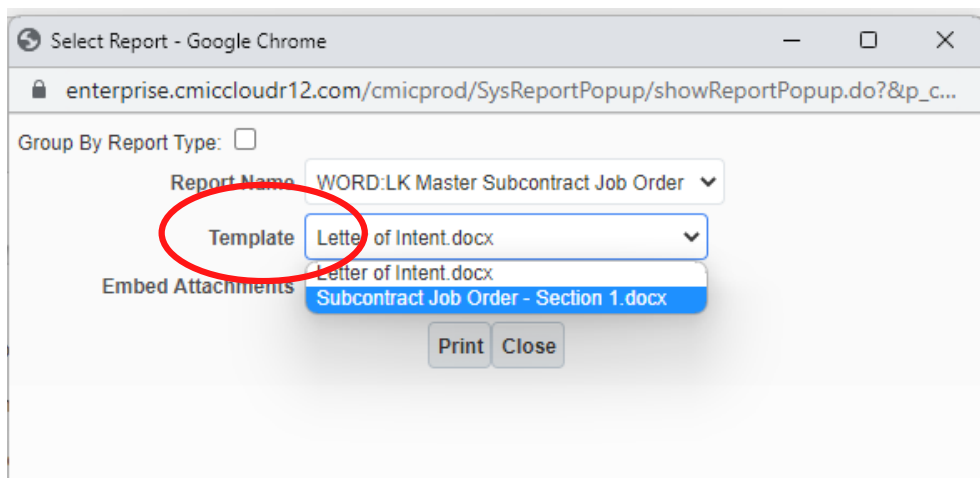
12

- To print/run the report - Click "Print" in the top right corner of the screen
- Once a new window opens, click "Print" again



***NOTE**

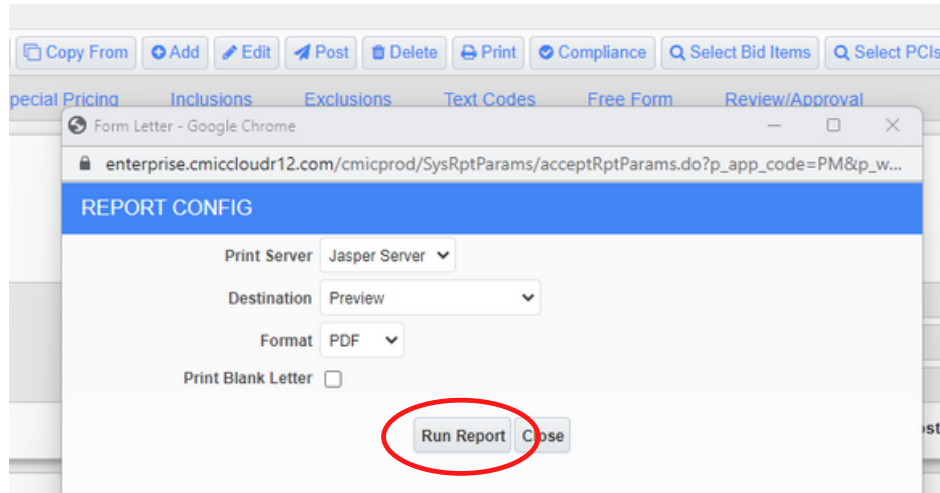
- Use the arrow next to "Template" to identify the form to be printed



Module 6: Create a subcontract

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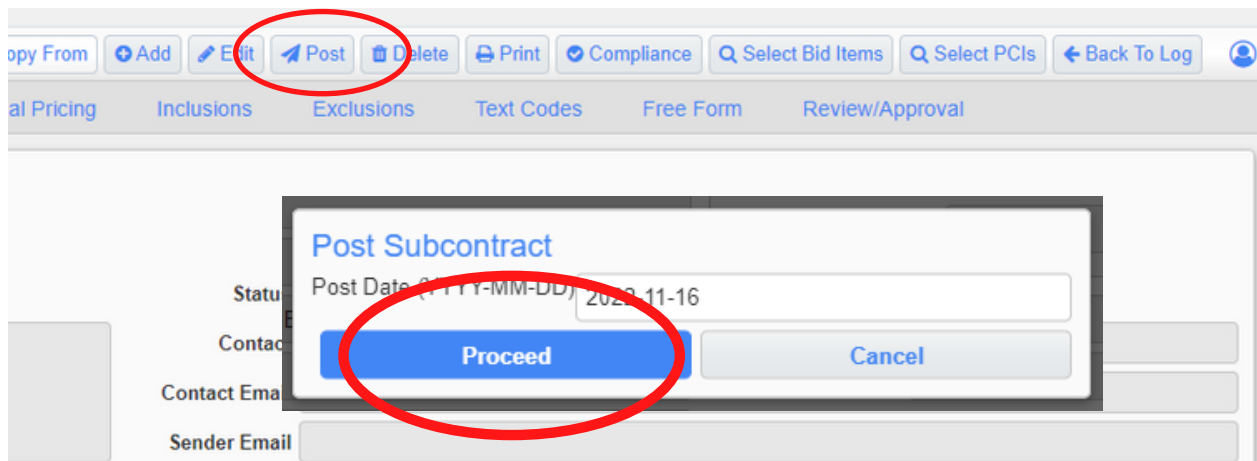
- Click "Run Report"



***NOTE- The subcontract should be sent through DocuSign and fully executed before posting**

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- To post the subcontract
 - Click "Post" in the top right corner
 - Click "Proceed"



Module 6: Create a subcontract

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- Go back to the tree view on the left side of the screen
- Click on "Cost Reporting"
- Click on "Current Cost to Date (Live)"



16

- Click on the 3 dots next to "Spent/Committed" to choose the categories to show on the job

A screenshot of a table with columns: Current Budget, Spent/Committed, Cost to Complete, Cost at Completion, and Variance. The 'Spent/Committed' column has a red circle around its header and a context menu open. The menu options are: Sort Ascending, Sort Descending, Columns, and Filter. The 'Columns' sub-menu is open, showing a list of categories with checkboxes. The categories are: Job Code (unchecked), Cost Code (checked), Description (checked), Category Code (checked), Original Budget (checked), Transfers (checked), External CO (checked), Current Budget (checked), Spent (unchecked), Committed (unchecked), Committed Remaining (unchecked), Spent/Committed (checked), and Cost To Complete (checked).

	Current Budget	Spent/Committed	Cost to Complete	Cost at Completion	Variance
0.00	0.00	130.10	0.00	130.10	
0.00	80,569.00	0.00	0.00	0.00	
0.00	335,292.00	0.00	0.00	0.00	
0.00	166,384.00	14,562.56	151,821.44	151,821.44	
0.00	67,618.00	0.00	67,618.00	67,618.00	
0.00	25,558.00	0.00	25,558.00	25,558.00	
0.00	20,643.00	0.00	20,643.00	20,643.00	
0.00	307,277.00	0.00	307,277.00	307,277.00	
0.00	281,149.00	0.00	281,149.00	281,149.00	
0.00	152,718.00	0.00	152,718.00	152,718.00	

