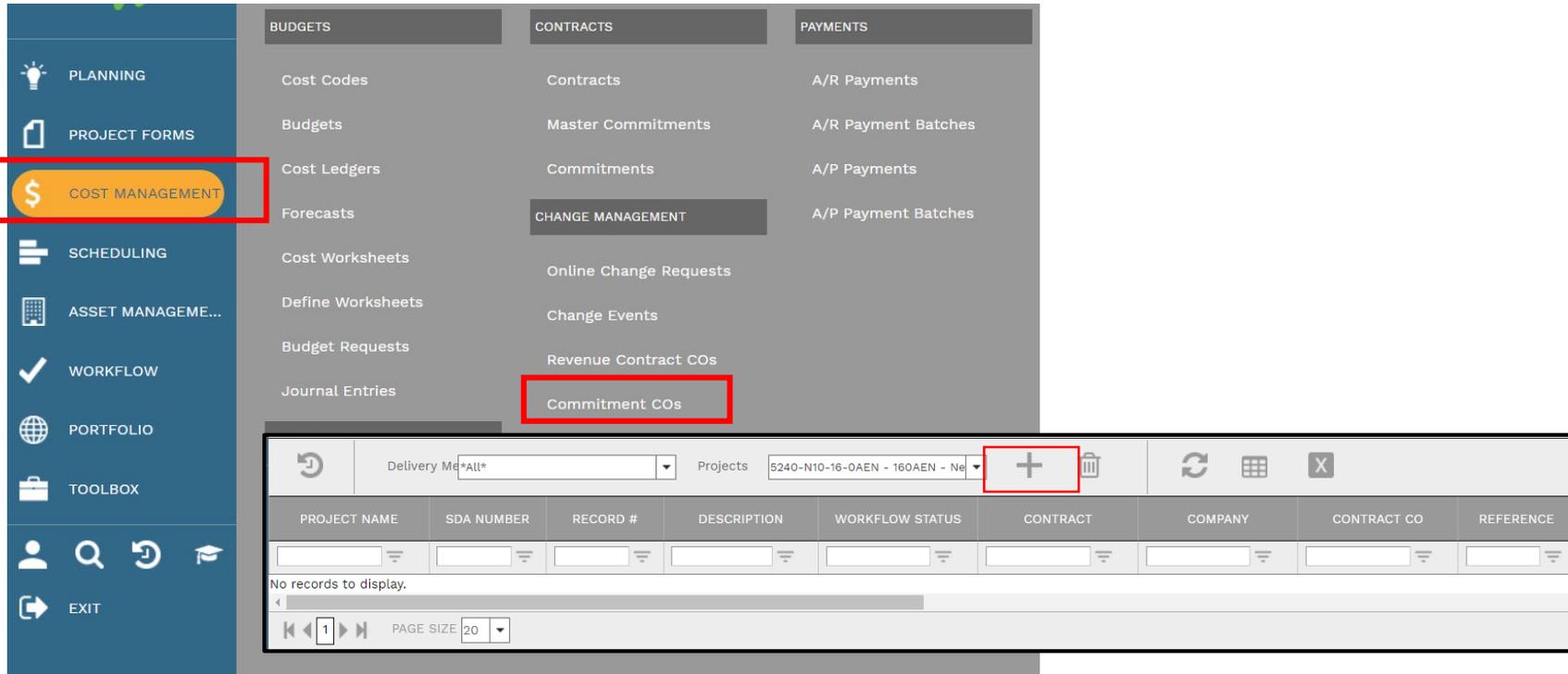


OPEN THE MODULE

- Choose **Cost Management -> Commitment COs**
- This displays the **Manager View** for the module and shows all records in the module.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the **Record #** column to search for a document, then double-click to open the document.
- Use the  to export this view to Excel for an ad hoc report.
- To create a new document, click **Add.** 



The screenshot shows the PMWeb interface with the following elements:

- Navigation Menu (Left):** Includes Planning, Project Forms, **Cost Management** (highlighted with a red box), Scheduling, Asset Management, Workflow, Portfolio, Toolbox, and Exit.
- Main Content Area:** Displays a grid of modules under three tabs: BUDGETS, CONTRACTS, and PAYMENTS. The **Commitment COs** module is highlighted with a red box.
- Table Header:** Includes filters for Delivery Method (All*) and Projects (5240-N10-16-OAEN - 160AEN - Ne). A red box highlights the **Add** (+) icon.
- Table Columns:** PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, CONTRACT, COMPANY, CONTRACT CO, REFERENCE.
- Table Content:** No records to display.
- Footer:** Includes navigation icons and a PAGE SIZE dropdown set to 20.

ADD THE TASK ORDER INFORMATION

- Enter the Project, Commitment (Contract), Description (as shown), Category, Cause (Not Assigned), Requested By, Assigned To, Change Order Date, Bill As (Time & Materials). Reminder: any field with an asterisk is a required field.
- Click the **Save** button when finished.
- **Note:** you must copy the text in the Description field to the description in the line item below, they must be the same.
- **Note:** The Category Field choices available are **Task Order** (for invoices previously entered in RESDB) and **Task Order – Design**. The workflow for each of these categories will route to different people, so ensure you have chosen the correct one for your Task Order entry.

4010-N12-23-0CCB - 230CCB - Paterson STEAM HS > Cost Management > Change Management > COMMITMENT COS










MAIN

Project*	<input type="text" value="4010-N12-23-0CCB - 230CCB - Pater"/>	Cause	<input type="text"/>	USER DEFINED FIELDS	
Commitment*	<input type="text" value="GP-0270-L03 - Brinkerhoff Environment"/>	Requested By	<input type="text"/>	Send to SIMS	<input type="checkbox"/>
Company	<input type="text" value="Brinkerhoff Environmental Services, Inc."/>	Assigned To	<input type="text"/>	CEO Review Reqd	<input type="checkbox"/>
Commitment Type	<input type="text" value="Site Investigation"/>	Change Order Date	<input type="text"/>	Board Review Reqd	<input type="checkbox"/>
Record #*	<input type="text" value="4"/>	Effective Date	<input type="text"/>	CEO Review Date	<input type="text"/>
Description	<input type="text" value="ATP - TO 2.0 SI"/>	Days	<input type="text" value="0.00"/>	Board Review Date	<input type="text"/>
Post As	<input type="text" value="Revised Scope"/>	RECAP		VP Approval Date	<input type="text"/>
Status / Revision	<input type="text" value="Draft"/>			Bill As*	<input type="text" value="Time & Materials"/>
Date	<input type="text"/>				
Change Request	<input type="text"/>				
Category	<input type="text" value="Task Order - Design"/>				
Reference	<input type="text"/>				

	COSTS	DAYS
Original Commitment A...	\$0.00	0
Prior Approved Changes	\$0.00	0
Prior Revised Contract	\$0.00	0
Total of This Change	\$0.00	0
Contract to This Change	\$0.00	0

- Click **Add** to enter the line item information at the bottom of the screen.
- Enter the information on the peach-colored line that displays. Enter the Description, Amount Requested, Cost Code (as shown).
- Click the **Save** button when done.
- **Note:** you must copy the Description from the Description in the header section, they must be the same.

Drag a column header and drop it here to group by that column

Use Units

LINE #	ATTACHMENT	DESCRIPTION	ITEM	AMOUNT REQUESTED	ADJUSTMENT 1	ADJUSTMENT 2	TAX	AMOUNT APPROVED	COST TYPE	COST CODE
g		ATP - TO 2.0 SI		\$50,000.00	\$0.00	\$0.00	\$0.00	\$50,000.00		010-PD0001-SI0003 - Site I

No records to display.

- On the **SDA Data** tab, click the **SDA** subtab, then enter **CM-SDA Approval Date**.
- Click **Update Records** when done.

4010-N12-23-0CCB - 230CCB - Paterson STEAM HS > Cost Management > Change Management > COMMITMENT COS > 4 - ATP - TO 2.0 SI

4 - 230CCB - Paterson STEAM HS - A

MAIN ADJUSTMENTS **SDA DATA** NOTES ATTACHMENTS WORKFLOW NOTIFICATIONS

SIMS Data

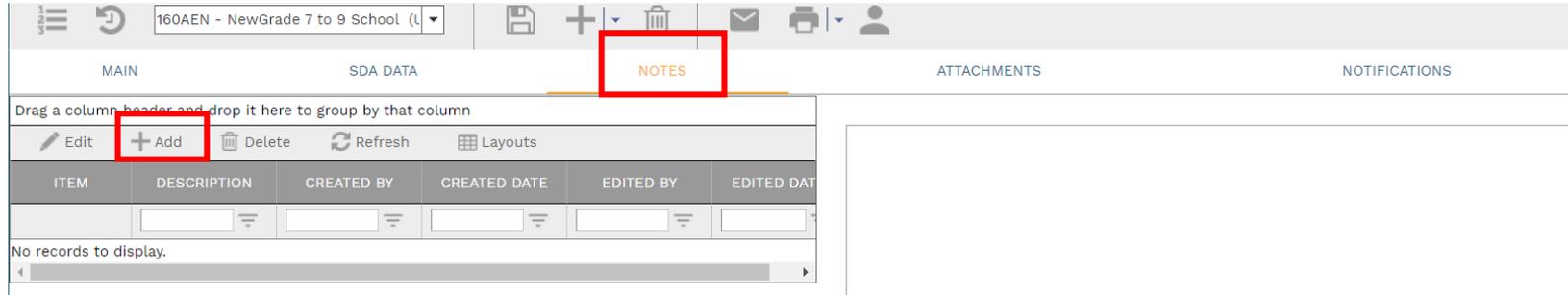
SDA

Update Records Cancel

SPEC	UOM	DATA	NOTES
Related to ClaimSettlement			<input type="checkbox"/>
CO Originated in SIMS(Check for Yes)			<input type="checkbox"/>
Approver Comments			
CM-SDA Approval Date		<input type="text" value="05-30-2024"/>	
Anticipated Board Date			

ADD ADDITIONAL NOTES

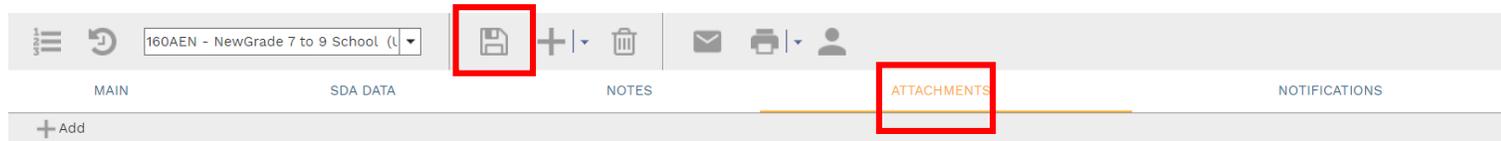
- Click **Add** on the **Notes** tab to add additional notes as needed. Click the **Save** button after each entry.



The screenshot shows a software interface with a top navigation bar containing icons for menu, refresh, a dropdown menu with '160AEN - NewGrade 7 to 9 School (L)', save, add, delete, email, print, and user profile. Below this is a tabbed interface with 'MAIN', 'SDA DATA', 'NOTES', 'ATTACHMENTS', and 'NOTIFICATIONS'. The 'NOTES' tab is active and highlighted in orange. Below the tabs is a toolbar with 'Edit', '+ Add', 'Delete', 'Refresh', and 'Layouts'. The '+ Add' button is highlighted with a red box. Below the toolbar is a table with columns: ITEM, DESCRIPTION, CREATED BY, CREATED DATE, EDITED BY, and EDITED DATE. The table is currently empty, displaying 'No records to display.' at the bottom.

ADD ATTACHMENTS

- Drag-and-drop your desired attachment(s) in the middle section of the screen. You can add any type of document. Repeat the process for all additional attachments. Click the **Save** button when finished.



The screenshot shows the same software interface as above, but with the 'ATTACHMENTS' tab selected and highlighted in orange. The 'Save' button (represented by a floppy disk icon) in the top toolbar is highlighted with a red box. The '+ Add' button in the bottom toolbar is also visible.



INITIATING THE WORKFLOW

- Click the **Workflow** tab and click the **Submit** button. This document will be reviewed for correctness by the parties identified in the workflow process. Those parties involved in the workflow review are established on a project-by-project basis. Add **Comments** as needed and click the **Save** button. Individuals who are part of the workflow approval will receive a notification to log in the system and review the workflow for approval. After document receives final approval, it will be submitted for processing by the SDA's Central Processing Unit team.

The image displays two screenshots of a software interface for initiating a workflow. The top screenshot shows the 'Workflow' tab selected in a navigation bar. Below the navigation bar, there are several sections: 'Workflow Actions' with a 'Submit' button highlighted by a red box; 'Email Preview' with fields for 'Subject' and 'Email Body'; 'Comments'; and 'Instructions'. The bottom screenshot shows the same interface after the 'Submit' action. The 'Submit' button is now 'Save', which is also highlighted by a red box. The 'Email Preview' section shows a subject line 'PMWeb Approval Request: Online Change Requests 001' and an email body starting with 'A document has been Submitted for approval by Jennifer Irizarry.' Below this, there is a 'Workflow Document Information' section with details: '- Document type: Online Change Requests' and '- Project Name: 130ACL - Camden H.S.'. A red arrow points to the 'Comments' field, which is currently empty.

REPORTING

- To run prepared reports, click the **printer icon** in the header section and select **BI Reporting**. Any report with “SDA” in front of the report name is a report we have customized based on staff needs. Select your desired report, then Print to PDF, export to Excel, or click the eye to view the report.

The screenshot shows a software interface with a top navigation bar containing icons for menu, refresh, search, save, add, delete, email, print, and user profile. Below this is a breadcrumb trail: MAIN > SDA DATA > NOTES > ATTACHMENTS > BI Reporting. A dropdown menu is open under 'BI Reporting', showing options: 'Go To BI Reporting Center', 'BI Reporting' (highlighted with a red box), 'PMWeb Reporting', 'PMWeb Word', and 'BI Reporting'.

Below the navigation bar is a table with the following data:

REPORT	RECORD TYPE	DEFAULT
Online Change Request	Online Change Request	
Online Change Request Form	Online Change Request	
SDA_OnlineChangeRequestForm	Online Change Request	✓

Below the table is a preview window titled 'REPORTS PREVIEW' with a toolbar containing icons for close, print, delete, next, and view. The preview window displays the 'Online Change Request Form' report, which includes the following information:

STATE OF NEW JERSEY SCHOOLS DEVELOPMENT AUTHORITY
Online Change Request Form

Project Name : 160AEN - NewGrade 7 to 9 School (Union City) Date Received : Workflow Status : Draft
 Contract # : HJ-0029-B01-Design Build Company : Dobco, Inc. Commitment CO : -
 Record : 001 Revision : 0 Change Event : -
 Description : Underground Storage Tank Requested Date : 05-22-2023 Cause : Dlt. Sit
 Category : D-B-B

Line #	Item Code	Description	UOM	Quantity	Unit Cost	Ext. Cost	Commitment Line	Cost Code	Cost Type
1		Underground Storage Tank		1.00	\$0.00	\$0.00		030-C30001-000001	
				1.00	\$0.00	\$0.00			

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