



Managing Subcontracts - Internal

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Managing Subcontracts

Background

A subcontract is a contract between the prime contractor on an agency contract and a third party. The subcontract assigns part of the work in the original contract to the third party. Managing subcontracts includes both the Area office Bookkeeper and the District Construction office. The Area Office Bookkeeper will enter the subcontractor for the contract and the District Construction office will approve the association with the contract in the

Key to Action Buttons



Global Actions menu (top of the screen)



Component Actions menu (on headings)

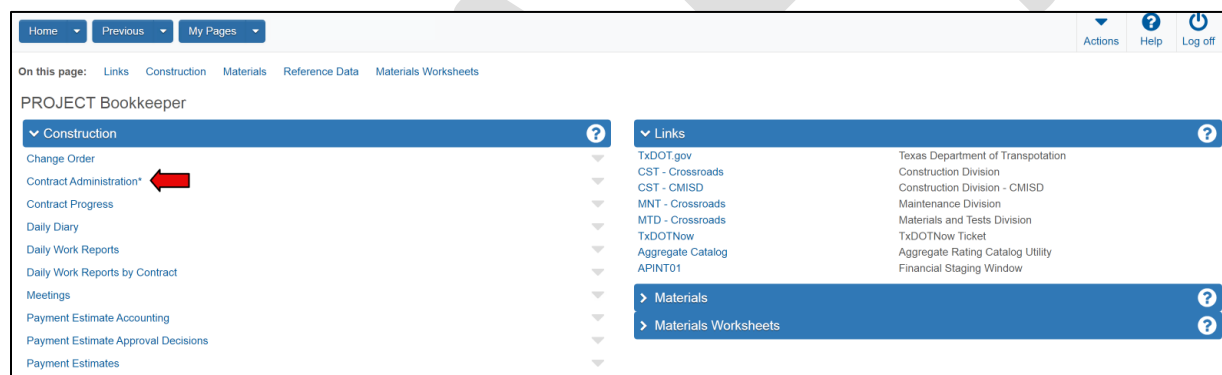


Row Actions menu (on rows)

Adding Subcontracts to a Contract - Bookkeeper

Navigation: Construction > Contraction Administration

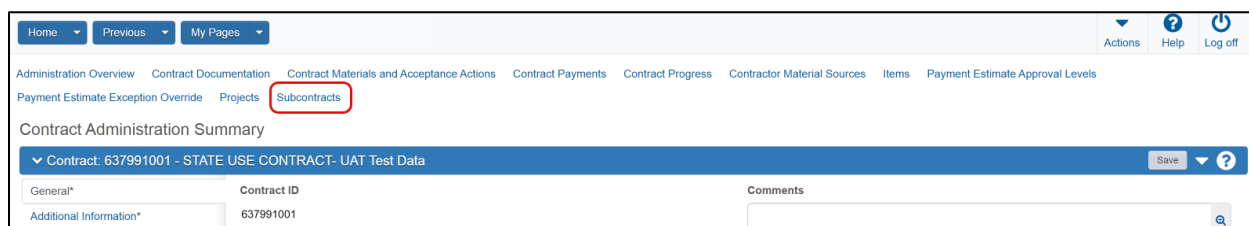
1. From the **Construction** component, select the **Contract Administration** link.



2. Search for and select the contract by clicking the **Contract ID** link.



3. From the Contract Administration Summary, click the **Subcontracts** quick link.



4. On the Subcontract Summary page, click the component **Actions** menu.
5. Click the **Add** action.

Home Previous My Pages

Administration Overview Contract Items Contract Payments Projects

On this page: Contract Subcontract

Subcontract Overview

Contract: 637991001 - STATE USE CONTRACT- UAT Test Data

Prime Vendor: 91049 -

Total Calculated Subcontract Amount (non-specialty)	Adjusted Projected Amount (non-specialty)
0.00	0.00
Total Allowable Maximum Subcontract Percent (non-specialty)	Total Allowable Maximum Subcontract Amount (non-specialty)
Total Towards Maximum Subcontract Percent (non-specialty)	Total Towards Maximum Subcontract Amount (non-specialty)
	0.00
Total Specialty Subcontract Percent	Total Specialty Subcontract Amount
	0.00

Subcontract

Save

Actions

Add

Attachments and Links

2024.05.06.01_DATA_XFER_DaveLeBlu.txt

TAB-A.PNG

No rows found matching criteria.

6. In the **Vendor** field, enter the vendor, by number or begin typing the vendor's name selected to work on the contract.

Add Subcontract

Save

Vendor *

12490

GILBERT TEXAS CONSTRUCTION(SEE KIEWIT)

Parent Subcontract Number

Total Calculated Items Total

Total Subcontract Amount

Total Sub Extended Amount

7. If this is a tier 2 or lower subcontract, in the **Parent Subcontract Number** field, click the drop-down arrow and select the parent subcontract from the dropdown list. Previously entered subcontractors will be available to choose as a Parent, if needed.

Parent Subcontract Number

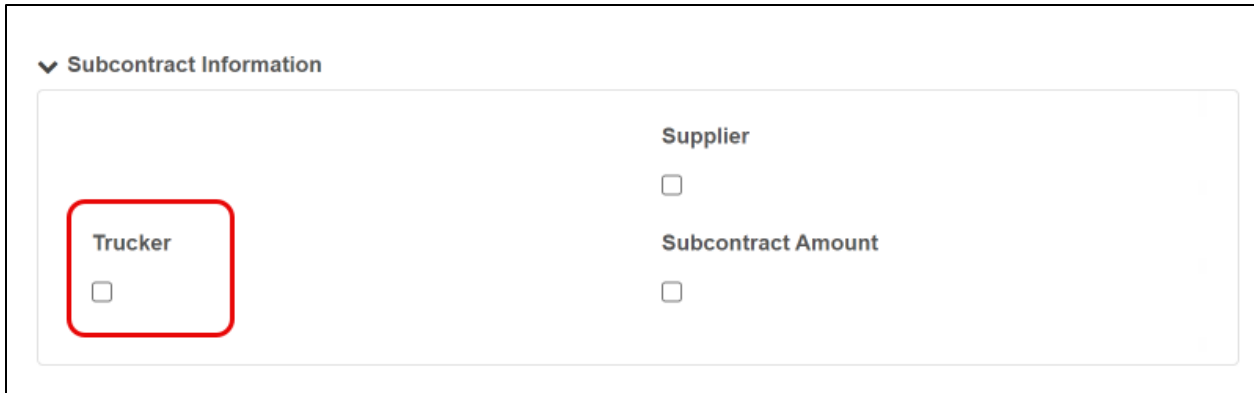
002 - 00041

WORK CLASSIFICATIONS

8. Click the **Save** button.

If the subcontractor request is identified as a Trucker, follow the following steps:

1. Click the **Trucker** check box if this subcontractor provides trucking services for the contract.
2. Click the **Save** button.



Subcontract Information

Trucker ☐

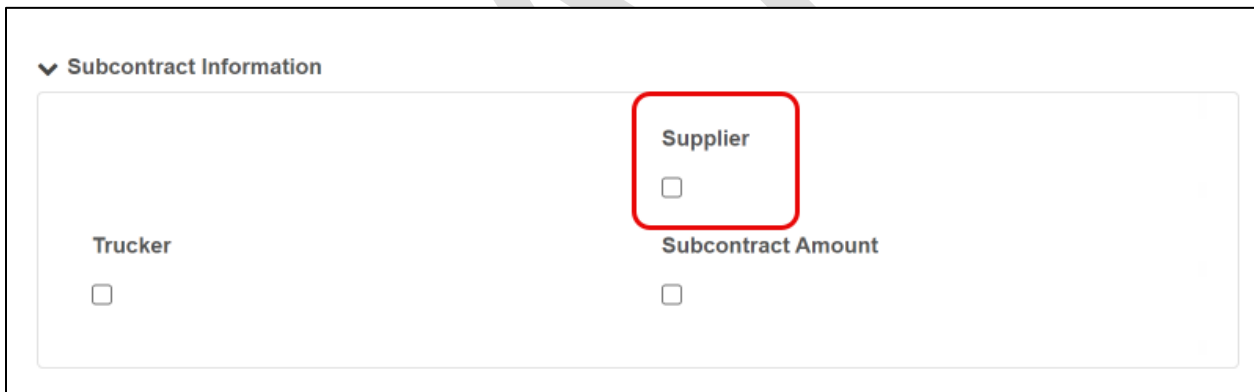
Supplier ☐

Subcontract Amount ☐

The screenshot shows a form titled 'Subcontract Information'. It contains three checkboxes: 'Trucker', 'Supplier', and 'Subcontract Amount'. The 'Trucker' checkbox is highlighted with a red rectangular box.

If the subcontractor request is identified as a Supplier, follow the following Steps:

1. Click the **Supplier** check box if this vendor is a supplier for the contract.
2. Click the **Save** button.



Subcontract Information

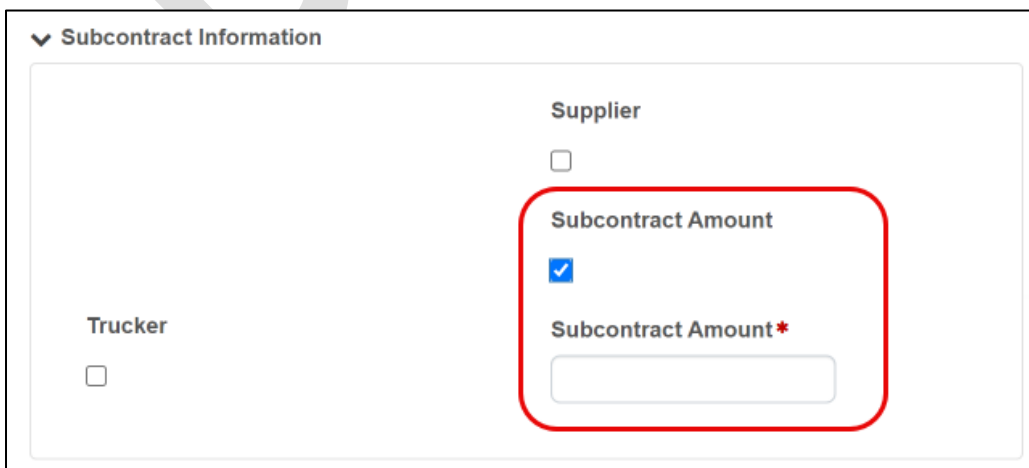
Trucker ☐

Supplier ☐

Subcontract Amount ☐

The screenshot shows the same 'Subcontract Information' form. In this step, the 'Supplier' checkbox is highlighted with a red rectangular box.

3. Click the **Subcontract Amount** check box.



Subcontract Information

Trucker ☐

Supplier ☐

Subcontract Amount ☒

Subcontract Amount*

The screenshot shows the 'Subcontract Information' form with the 'Subcontract Amount' checkbox checked and highlighted by a red rounded rectangular box. Below the checked checkbox is a text input field labeled 'Subcontract Amount*'.

4. Enter the dollar value of the subcontract agreement in the **Subcontract Amount**.

Subcontract Information

Supplier ☐

Trucker ☐

Subcontract Amount ☒

Subcontract Amount*

5. Include additional information, as applicable, in the **Comments**.

Comments

6. Enter the **Ready for Review Date**. This date is required for the District Construction Office to be able to enter the Approval Date.

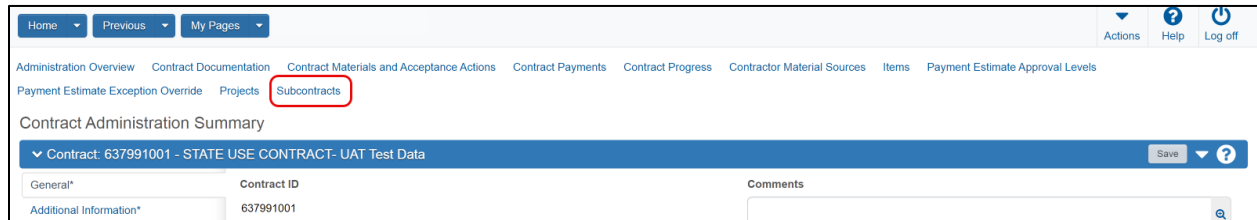
Ready For Review Date

Approval Date

7. Click the **Save** button.
- **Note:** The calculated amounts will be populated after the record is saved.

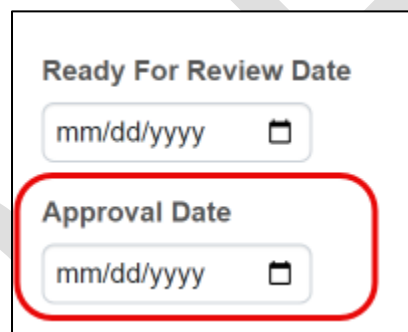
Approving a Subcontract Request – District Construction Office

1. The Area Office will notify the District Construction office of the need to review the Subcontract(s) for Review.
2. From the **Construction** component, select the **Contract Administration** link.
3. Search for and select the contract by clicking the **Contract ID** link.
4. From the Contract Administration Summary, click the **Subcontracts** quick link.



The screenshot shows the 'Contract Administration Summary' page for 'Contract: 637991001 - STATE USE CONTRACT- UAT Test Data'. The 'Subcontracts' link in the top navigation bar is highlighted with a red box. The page includes tabs for 'General*', 'Additional Information*', and 'Comments'. The 'Contract ID' field displays '637991001'.

5. The District Construction office, after verifying the subcontractor information, will enter in the **Approval Date** field, the date the subcontract was approved.



This close-up shows two date input fields. The first is labeled 'Ready For Review Date' and the second is labeled 'Approval Date'. Both fields have a placeholder 'mm/dd/yyyy' and a calendar icon. The 'Approval Date' field is highlighted with a red rounded rectangle.

Adding Bid Items to a Subcontract

Navigation: Construction > Contraction Administration > Subcontracts quick link > Sub Num link

Note: These steps are not currently applicable.

1. From the Subcontract Summary, click the **Items** tab.
2. Click the **Select Items** button.
3. Search for and select the items to add to the subcontract.
4. Click the **Add** to Subcontract button.
5. Expand the row to enter information for the new subcontract item.
6. In the **Quantity** field, enter the number of units of the item to be included on this subcontract.
7. In the **Subcontract Unit Price** field, enter the unit price for the item to be paid to the subcontractor by the prime contractor.
8. Click the **Save** button.
9. Click the **Detail** tab.

Reviewing Subcontract Items

Navigation: Construction > Contraction Administration > Subcontracts quick link > Sub Num link

Note: This is only applicable if subcontract items are entered.

1. From the Subcontract Summary, click the **Items** tab.
2. Review the following fields of each item for accuracy:
 - **Quantity**
 - **Unit of Measure**
 - **Prime Unit Price**
3. Once all items have been verified, click the **Detail** tab.
4. If any information is updated, click the **Save** button.

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