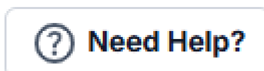
PMWeb Full User Demo / Training

1. PowerPoint Orientation

2. Login

   a. Turn off popup blockers
   b. https://du.pmweb.com/PMWebSAML This is the Production/Live site
   c. https://du.pmweb.com/train/PMWebSAML This is Training site for Full Users
   d. 2 stage authentication every time
   e. Breadcrumb bar
   f. Portfolio→Profile
      i. Allows personalization
      ii. Set Delegates (future training)
   g. Need Help? Button 

      takes you to online PMWeb help; note that the help screens will not exactly match DU screens due to personalizations by DU
   h. Logged into: All Levels – filters what record levels you're seeing

3. Project Records (Portfolio→Projects)
   a. D365 to toggle PMWeb projects
   b. Header Toolbar –
      i. Overall record save – not Details save
      ii. Message – email link generated through PMWeb
      iii. Typically, on PMWeb reports, there is a printer button with a drop arrow. Clicking the drop arrow allows two main functionalities – show linked BI Reports and show linked PMWeb Word templates.
      iv. Please note that the button to the right of the printer icon is the active/inactive toggle. It will read Active if you hover over it. This activates/deactivates the project and all associated records – can be used as a part of final project closeout.
   c. Main Screen:
      i. Review Program – may need to update in D365
      ii. Project ID and Name autopopulate from D365
      iii. Any changes to Program, Project ID, or Name must be completed in D365
      iv. Status and type – optional

d. WBS:
    i. Review population from D365
    ii. If changes need to be made to the WBS, they need to be made in D365. PMWeb will auto-update from D365
e. Users:
    i. Check and update User Role assignments. Note – this must be done in Portfolio→Projects. These are the roles, such as Approving Manager, Contracting Officer, etc. as laid out in the updated regional procurement trainings. Add/replace users as needed by dragging and dropping from the Workflow Roles Users column; Note, only Users assigned to Roles will have access to Document Manager and other records
f. Notes, Attachments, and Notifications tabs are optional
g. PMWeb Word – None for Project Record
h. BI Reports – None required for Project Record; **Note: it may take 1-2 minutes to load BI reports for the first time or after a cache clearing.**

4. Tools→Document Manager
    a. Document Manager Root Folder → Locations – not used
    b. Document Manager Root Folder → Projects -
        i. Folder created on sync w/D365;
        ii. Document Manager is file storage location
        iii. Files stored in Document Manager are able to be linked to records so that the Document Manager file can be available in multiple records
        iv. Best Practice is to save all project related files that are needed in PMWeb in Document Manager. Project files can be dragged and dropped into the appropriate Document Manager→Project folder.
    c. Shared Folders: Other read-only resources
        i. In Document Manager→Shared Folders is <u>Document Manager folders and files map.pdf</u>. This has information on folder structure, organization, templates, and shared folders.
        ii. The most recent national procurement forms will be stored in Shared Folders. As needed, user can drag and drop to their Document Manager→Project Folder or download to local drive.

5. Create Budget Request (Costs → Budget Requests)
    a. Note that the Header Toolbar, Headers, and Details look different than Project record. Save and Print are largest changes.

   b. Create new Budget Request record and set header fields
      i. Description – regional best practices
      ii. Type - optional
      iii. Post As – Original Budget and Revised Budget differences
      iv. Use Units – toggle that changes the available columns for Detail layouts. Likely will want off, but can test and see.
   c. Save to enable adding Budget Lines in Details
      i. Cost Code is required and is fundamental to the function of PMWeb. Cost Codes correlate to Categories in D365
      ii. Description and notes in the Details can be used for identifying funding sources – regional best practices will apply
      iii. Project Budget is the dollar amount the PA is making available for that Cost Code
      iv. Start and Finish – regional best practices for funding source deadlines
   d. Notes and attachments are optional.
   e. BI Reports - Budget Request Report – DucksUnlimited_BudgetRequest
   f. PMWord – none
   g. Notification – if desired to send internal link/info
   h. Submit to Workflow –
      i. Explain workflow locking record
      ii. Withdraw – ends record, but doesn't delete
      iii. Return – sends back to previous step/user
      iv. Approve - sends on to next, but non-final, step
      v. Final Approve – locks record (can't be undone), enables Generate
      vi. **Best Practice on all workflow approvals is to leave a comment in the Comment field.**
      vii. For Budget Request, Workflow routes to PA
      viii. See <u>Budget Request Approval Workflow – 2-28-2026.pdf</u> for workflow flowchart.

6. Create Estimate (Plans → Estimates)
   a. Header Toolbar is "old" style. 3D drop arrow is not used (Revit)
   b. Create New Estimate Record and set header fields
      i. Select project from list, can smart search in box
      ii. Description is description of the type of procurement the estimate is for.
      iii. Category and Estimate units are optional
   c. Save, then in Details:

    i. Add Estimate Items assigning Cost Costs, Bid Category (bio or engineer), and WBS for each line. Can also import from Excel.
    ii. The Add Items, Add Assembly, and Add Resources buttons are not used.
  d. Notes and Attachments are optional
  e. Select appropriate clause/clauses for inclusion in summary report
  f. BI reports - Estimate Report – Ducks_EstimateDetails
  g. PMWord – None for Estimate
  h. Notification – if desired to send internal link/info
  i. Submit Workflow
    i. See Estimate Approval Workflow – 2-28-2026.pdf for workflow flowchart.
  j. When Status is Approved, Generate can be used for creation of Budget Request (optional).

7. Create Pre-Bid Package (Plans --> Pre-Bid)
  a. Create New Pre-Bid Record and set header fields
    i. Select project from list, can smart search in box
    ii. Pre-bid # - autopopulates
    iii. Description – This is the description of the procurement you are starting. This text will track through to the end of the project.
    iv. Bid Category – bio or engineer
    v. Bidding Company – set as Ducks Unlimited
    vi. Bidding Contact – select DU's CO, can smart search in box
    vii. Bid Due Date, Time – **Central Time Zone**
    viii. Commitment Type – UPA, Materials, or Consultant *Note – only UPA on initial PMWeb rollout*
    ix. Procurement – will autofill upon Generation of Procurement
    x. Options - regional policy?
      1. Recommended settings:
        a. Sealed Bid – as appropriate by Procurement Manual or Regional choice
        b. Lock Online Bids – yes
        c. Include Days Column – yes if calendar day job
        d. Include MWDBE – as appropriate by CGS or Region
        e. Include Manufacturer – no
        f. Include Bid Item UDFs – no
        g. Require Acknowledgements – yes
        h. Require NDA – yes
        i. Show Bid Due Clock – yes or Regional choice

            j. Lock Quantity in Online Bids - yes

xi. Non-Competitive Procurement – if known at this point

xii. DBE through Work Area – filter for bidder queries

1. Select all appropriate needs under DBE
2. Select all appropriate needs under Non-Construction
3. Select all appropriate needs under Construction
    a. *Note – 1-3 are exclusive queries. For each item selected, the contractor must match exactly. I.e. if a contractor only matches 6 of 7 selections, they will not be added.*
4. Select what regions to query from. If you want to query across regions, e.g. MN contractors for ND job, you have to select both regions. *Note – Region field is only used to populate Work Area query and will not work on its own*
5. Select what work areas to query.
6. <u>You have to hit Save (disk icon above Main) BEFORE running Apply Filters.</u> This is a webpage, so it doesn't remember the selections.
7. All companies that exactly match the queries will populate the Details field. Delete any that you don't want and Save.
8. To query for additional contractors, you can select fewer options each iteration and run additional queries. Remember to Save before running each new query and to watch the Details list for what companies populated in. Save often.

b. Add Bid Items from your estimate – won't bring across WBS at this time (upcoming patch)

i. Make sure Include In Bid is checked for items to send to bidders in bid package

c. Review Other Tabs –

i. Specifications - Specifications are used to populate bidding forms and correspondence. Fill out as completely as possible.

ii. Checklist - Add Pre-Bid checklist

iii. Notes – Optional, but if Include in Bid is checked, bidders will see it

d. Review Companies in the Main Tab under Details for completeness/accuracy. For each company on the bid list, make sure their Bid Category is set to Engineer. Bid Category in the header is technically different than in details, so it won't automatically happen.

e. BI Reports – Pre-Bid Form – Ducks_PrebidForm

f. PMWeb Word –

i. Open the default template (Pre-Bid Bid Dox).

    ii. Click the MSWord icon 
    iii. Save to a local drive
    iv. Optional: follow the same instructions as for Pre-Bid Dox to download No Bid template. On the local drive, make any needed updates, convert the file to a fillable pdf, and insert at the end of the bid package assembled in (h) below.

g. Attachments –
    i. Click Add
        1. Select Add From Document Manager
        2. On the left side, navigate to Shared Folders> 5.0 Procurement Templates
        3. Select Pre-Assembled Bid Dox *[date]*.pdf and click Attach.
        4. Using the  button, download Pre-Assembled Bid Dox.pdf to a local drive.

h. Offline from PMWeb
    i. The PMWord template that was downloaded as an MS Word file contains bid documents created from the Pre-Bid Specifications. Review the documents for accuracy and any specific edits that may be needed.
    ii. Convert the bid package to a pdf and combine with Pre-Assembled Bid Dox.PDF and save as the *Procurement* Bid Documents

i. Attachments -
    i. Best practice is to load the *Procurement* Bid Plans (CAD drawings) and *Procurement* Bid Documents into Document Manager and link them here.
    ii. Can add from computer as well
    iii. Attach Bid Plans and Bid Documents
    iv. In the Details screen, select both files, click the details icon (next to Add – looks like a one button mouse), and on the far right click the pencil icon to edit details. Scroll down, select Include in Bid, and save. Note that this setup will change in future iterations.

j. Submit for Workflow
    i. See <u>Pre-Bid Approval Workflow – 2-28-2026.pdf</u> for workflow flowchart.

k. Generate Bid Package (Procurement) – note the Sent Check is only sign that the Bid Package was created, also note to use Generate (lightning bolt) not Plans →

Bid Package to generate new, **<u>remember that the Bid Package is visible as soon as Procurement is generated</u>**

8. Bid Package Setup (Plans→Bid Packages)
    a. Since the Bid Package was generated at the Pre-Bid module, it will already be in here and ready to select.
    b. Remember that Bid Package is visible to bidders through PMWeb, though they will not be notified until you send the notification.
    c. Verify all Header, Bid Items, Bidders, and Specifications information came over from pre-bid correctly. Verify that attachments came over and are marked for Include in Bid, as appropriate.
    d. Bid RFI cutoff date, if used, closes the RFI functionality just after midnight on the date selected (i.e., no RFIs or replies beginning on that date)
    e. Bids Due Date, Time – can be updated while in Draft, but attached files <u>do not</u> auto-update. Bid opening dates/times in the PDFs would need to be updated and re-uploaded.
    f. Pre-Bid is a simply a hotlink to the Pre-Bid record.
    g. Options – Check that Notify Bid Contact on Bid RFI Questions is on. All other options are locked after coming over from Pre-Bid.
    h. Bid RFIs –
        i. Can be used to push out Text and Attachments to all bidders
        ii. Bidders can submit questions/clarifications/etc.
        iii. Answers can be Text and Attachments
            1. Does not send the answer until Publish To is selected
            2. Submitter Only – used for answers to questions specific to only that bidder (related to their account, etc.)
            3. All Bidders – used for answers to questions specific to the procurement (explanations, added files, etc.)
            4. Not Published – reply has not been sent
        iv. After Publishing the reply, a Notification must be sent to the individual bidder or all bidders, as appropriate, that an RFI has been posted. <u>Bidders are not automatically notified of RFIs.</u>
    i. Notes Optional, but if Include in Bid is checked, bidders will see the Note
    j. Scoring not currently used
    k. Notification – **when ready to start the official bidding process**, send email from within PMWeb to an in-house recipient with BCC to all bidders. Notification will not work without at least one email address in the To: line. All bidders with emails in their company record should autopopulate into the BCC line.

        i. If you want to include DU standard Bid Solicitation report, select Merge Template: Bid Solicitation Email as an attachment. Note, this file is also in PMWeb Word templates.
        ii. Additional information can be added in the Message box.
        iii. If using Notifications tab rather than the "Envelope" icon, remember that the Notification needs to be saved <u>and</u> sent.
        iv. The email is not immediate and is sent for spooling. Not all emails may go out at the same time, but all should send within about 20 minutes.

l. Click Submit for Workflow
    i. See <u>Bid Package Approval Workflow – 4-8-2026.pdf</u> for workflow flowchart.
m. Workflow submits to CS-P – **<u>workflow should not progress during active bidding</u>**
n. RFIs and Notifications will be open to any DU user with project access.
o. Only the CS-P will have access to any other changes. CS-P can return the workflow to the CO for changes, as appropriate. CO will then need to re-submit workflow.
p. All document changes other than an RFI must be accompanied with an Addendum Form
    i. PMWeb Word – Addendum, save to computer as MSWord file, update file, post as Attachment marked as include in bid, and send Notification email with file as attachment
q. If a more substantive change needs to be made (returning a bid due to bidder error or request to withdraw) –
    i. Manage Bids has the option to Reissue Bids
    ii. Reissue Bids effectively starts most of the bidders' work over, so be aware before using
    iii. Click Reissue Bids
        1. Copy Bid Amounts will save the bidders' pricing that they have saved to date
        2. Send Notification must be checked
        3. Lock Prior Bids should be checked to minimize confusion on the bidders' parts
        4. Click Reissue
        5. Send Addendum as in (o.) above
r. Once bid clock ends/bids close
    i. Bid Summaries will show in the Main screen Details

        ii. Manage Bids screen Details has hotlinks to each bidder's Online Bid where more information, attachments, etc. can be reviewed. Clicking the Procurement # hotlink from the Online Bid will take you back to the Bid Package

s. CO reviews bid packages and does offline confirmations of what bidder to select as regionally required
    i. If sole source or low competition, select appropriate field in UDF
    ii. Document low competition or sole source (forms in Document Manager or text in Notification that CS-P can file as a Note)
    iii. Send Notification to CS-P with information above including selected bidder
t. CS-P load checklist and complete.
    i. If unable to proceed with selected bidder (bonding issues, etc.), CS-P can return the record to the CO.
u. Select bid to award, and award
v. If an Unsuccessful Bidder/Dear Contractor letter is needed, a template is available in PMWeb Word.
w. When ready to go to contract
    i. If Non-Competitive field is <u>not</u> checked, CS-P final approve workflow
    ii. If Non-Competitive field is checked, workflow will route to director for final approve workflow.
x. Generate commitment – Note that in the Generate Commitment screen that Type and Category need to be reviewed in the header as they don't autopopulate.

9. Vendor Online Bid – **Instructions for vendors**
    a. Login as vendor
    b. Accept NDA
        i. If Require NDA was not selected, the Vendor will be asked to Accept or Decline the invitation. If they hit Decline, a popup option will come up asking if they want to be removed from the bidders list. If they select Yes, it will remove them from <u>ALL DU</u> Bids
    c. Header fields are all locked
        i. Under Bidder Information:
            1. 0.00 Amount Lines value is the number of bid item lines with no price entered by the bidder
            2. To Acknowledge shows how many Submission Acknowledgments remain out of the original set of them

d. Details – bidder can fill out either unit price or total price. Note, Refresh button wipes unsaved work. Disk icon must be used to save prices.
e. Bid RFIs
    i. Add line, ask question. If long, can use … button to move to memo format. Bidders should know that anything asked could end up going to all bidders.
    ii. Click Update record. If an attachment is needed, it can be added after the first Update click. Middle button is Save and Exit
f. Specifications – Not currently used. A Note to Bidders with a spec stating that Construction Specs are in Attachments is there as a test to see if that helps communicate better
g. Scoring – not currently used.
h. Submission –
    i. If selected in options, vendor must acknowledge all bid items and attachments.
    ii. Contact and phone fields are required
    iii. Completion Date is required for system functionality, but is not used in our process. Note that in BI reports it may show up as Bid Expiration date.
    iv. All other fields are optional
    v. None of the Bidder Information fields are linked to functionality.
i. Notes and Notifications are optional
j. Attachments is where the bidder should upload their filled out bid package. <u>Note, Online Bids is also where the successful bidder can upload materials for DU as a part of the UPA process.</u>

10. Commitment - (Plans → Bid Packages)
    i. Verify header is setup correctly
    ii. Project, ID, and Company autopopulate
    iii. Description should come over from Pre-Bid and Bid Package
    iv. Select Type of contract. *Note – initial rollout of PMWeb will only involve UPAs*
    v. Select/Verify Category
    vi. Select Effective Date, Days
        1. Effective Date is the date that we are considering the project to begin from a construction standpoint. It is not the UPA or NTP date.

2. For a calendar day job, i.e. a job that has X number of days to complete, the effective date is the date that the days start counting against the contracted amount.
3. For a calendar date job, i.e. a job that must be completed by a specific date/deadline, the effective date can be set more freely but <u>must</u> have number of days until the calendar date deadline set in the Days field.

vii. Set Retention on Services and/or Stored Materials as appropriate

viii. NTP Date is used for form/document population. This is the date of the execution of the Notice to Proceed

ix. Select Cost Center – required for invoicing to work

x. Original and Revised Completion Dates autopopulate –

1. Original Date is Effective Date + Days
2. Revised Date is Original Date + Change Order Days

b. Verify Details are correct

c. Specifications – Fill out contact information for Contractor and DU. Note, some DU fields populate from Companies database

d. Load checklist for NTP

e. Clauses not used

f. Notes, Notifications are optional

g. Change Orders, Progress Invoices, Payments discussed in separate sections

h. Attachments – Note that Commitment attachments are "one-way" from DU to the contractor. Contractor cannot add attachments to the Commitment record

i. BI reports – DucksUnlimited_UnitPriceAgreement V4

j. PMWeb Word – NTP

i. NTP is set to be downloaded as MSWord file. File can be corrected as needed offline, converted to pdf, and uploaded to Document Manager for use.

k. If you want the Contractor to be able to see/access Commitments and Progress Invoices/pay reqs:

i. Go to Portfolio>Projects

ii. Select the project you are working on

iii. Go to Users

iv. Under Project Access, in the second column, expand Vendor (Guest)

v. Single click the contractor you are using

vi. Right click and select Grant Access

l. Submit to workflow

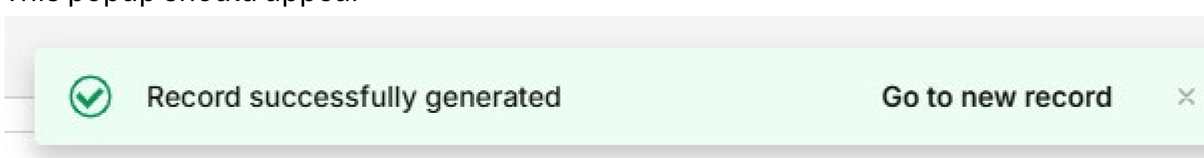
        i. Workflow will route to CS-P to allow for DocuSign execution by Contractor and DU
        ii. See Commitment Approval Workflow – 2-28-2026.pdf for workflow flowchart.

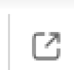
11. Online Change Request (Costs → Online Change Requests) (Note: these are not initiated on the Change Order tab on Commitments page)
    a. If the contractor has been granted access, the contractor and DU will both be able to initiate OCRs. If contractor does not have access, DU will need to create the OCR.
    b. Create new request. Set Project first, Commitment second, and Company third.
    c. Description – optional description of the request
    d. Record # - autofills
    e. Type - optional information
    f. Category –
        i. No Budget Change – used if only a change in days
        ii. Budget Change – used if any increase in cost
    g. Comment – optional for explaining the reason for the request
    h. Best practice is to have Use Units checked
    i. Add line details for increased cost and days
        i. Cost Code – needed for budget
        ii. Commitment Line – used if you want to modify an existing pay item (e.g. add 50 more tons of gravel); not used if you want change order to show on its own pay line
        iii. Description – text that will show on pay line. Will default to match the cost code, but can be overwritten as desired.
        iv. Quantity, UOM, Unit Cost – addition in quantity; must fill out original unit price and UOM for proper functionality if modifying a commitment line.
        v. Ext. Cost – this is the amount of the increase. For example, on a lump sum change from one lump sum item at $5000 being changed to $6000, the Ext. Cost would be $1000 – the increase only.
        vi. Days – used if more time being added to contract; only record the additional days
    j. Specifications and Clauses not used
    k. Notes, Attachments, and Notifications optional
    l. BI Reports – none required
    m. PMWeb Word - none
    n. Submit for workflow

i. See Online Change Request Approval Workflow – 2-28-2026.pdf for workflow flowchart.

12. (If Required) Budget Request to add or move funding
    a. If the OCR exceeds the available funding by Cost Code, a revised Budget Request is needed
    b. Follow the same steps as in #5, making sure to use same project number
    c. Post As should be set to revised for each additional Budget Request.
    d. If a contingency (Cost Code DU-9900) was used in the original budget, the first line in the Details is to use Cost Code DU-9900 with a negative value to shift the funding. The second line is to use a Cost Code matching the OCR Cost Code and to use a positive value to shift the money between Cost Codes.
    e. If additional money is being added to the Budget Request, add it to the appropriate Cost Code.
    f. Submit for Workflow
        i. See Budget Request Approval Workflow – 2-28-2026.pdf for workflow flowchart.

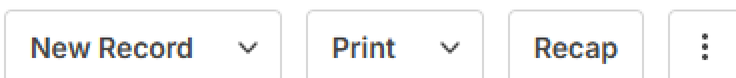
13. Commitment Change Order (Costs→Commitment COs)
    a. Once OCR workflow and applicable Budget Requests are done, go to OCR and use the button and Generate Change Order.
        i. Select all appropriate lines to generate and click save.
        ii. This popup should appear



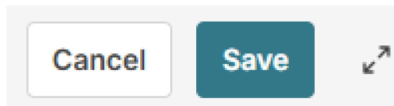
    b. If you didn't click Go to new record, the  button under Commitment CO will hotlink you to it.
    c. Most header records autopopulate
    d. Description – optional description of Change Order; will default to OCR description but that can be overwritten.
    e. Change Request – hotlink to OCR
    f. Category – select as appropriate
    g. Requested By, Change Order Date – optional
    h. Days – handled by OCR

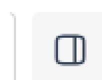
i. Sole Source, Bid Type – select as appropriate
j. Verify cost detail info is correct, including WBS
k. Load and follow checklist
l. Specifications and Clauses – not used
m. Notes, Attachments, and Notifications - optional
n. BI Reports – Ducks_Commitment_CO_Form
o. PMWeb Word - none
p. Submit for Workflow
    i. See Commitment Change Order Workflow – 4-9-2026.pdf for workflow flowchart.
    ii. **Note: If Sole Source, CS-C reviews if checklist documentation is completed. Return record until complete.**
q. Verify Commitment Change Order is present on change orders tab on the Commitment record

14. Progress Invoices (Costs→Progress Invoices) – *Note – instructions will vary depending on whether the contractor was granted access to the project as in 10k above*
    a. Create initial progress invoice – select the three dots button



    b. Select Generate Progress Invoice
    c. Open the record for the Progress Invoice
    d. Complete header record fields
        i. Most fields autopopulate
        ii. Description – optional/regional best practice
        iii. Invoice Date, Invoice Type – set as appropriate
        iv. Category – set for engineer or biologist.
        v. Contact, Comments – optional/not used
        vi. Paid in Full – leave blank, used with D365 integration
        vii. Cost Period – not used in initial implementation of PMWeb
    e. Specifications – do not edit/modify. This is used as a part of the integration with D365 and is automated.
    f. Offline discussions with contractor to reach approved amounts, receive Progress Invoice and any other required documents
    g. Details – **Note: if the contractor has been granted access to the Project, they will be able to fill out the Project Invoice details and submit to DU. They access the record the same way through their portal. Once complete, they need to notify DU that the invoice is ready for review.**

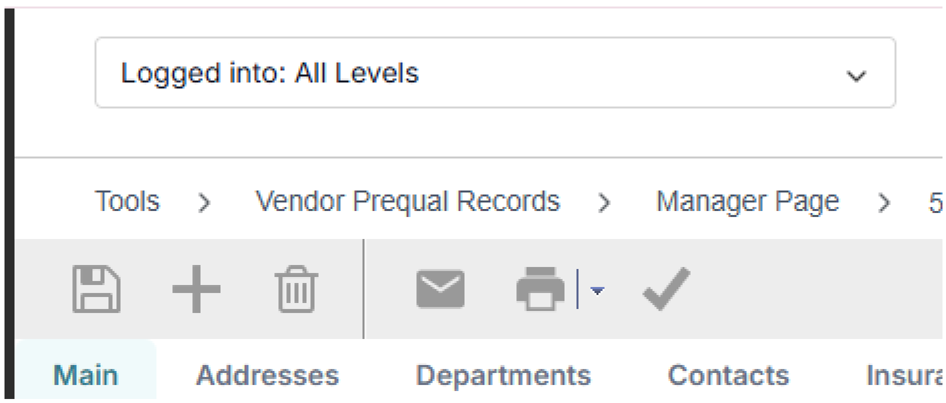
i. If applicable, click Link Change Orders and link those that apply.
ii. Likely want Use Units box checked for ease of use
iii. Edit Details to add pay amounts
iv. Select Line(s) for editing
v. Can use quantities or percentage
vi. Add stored materials, if applicable
vii. Retention autocalculates, but can be edited
viii. Save the Details section 

h. Add and follow Commitment>Pay Req – Pre-Pay Checklist
i. If lien waivers are needed, click Attachments
   i. Add from Document Manager
   ii. Click add navigate to Shared Folders drop arrow
   iii. Navigate to 6.0 Construction Templates→Lien Waivers drop arrow
   iv. If specific state rules, they will be listed under the state, otherwise generic
   v. Select and Attach appropriate template file(s)
   vi. This will send you back to the Progress Invoice page. Select the file(s) you just attached, make sure details is on  , and download to a local drive.
j. *Offline from PMWeb:*
   i. The file(s) downloaded from Document Manager will be PDF or MSWord files. They will need to be completed as appropriate along with any regional-specific documents.
k. Continue in PMWeb at Costs>Progress Invoices>Attachments
   i. Select and Delete the template file(s) from the Project record
   ii. Select Add From Document Manager
   iii. Navigate to the Projects→*your project*→Procurement→03 Construction→04 Pay Requisitions. Click Add file
   iv. Upload your completed files from (j) above.
   v. Note – uploading the files this way stores them in Document Manager rather than in the Progress Invoice record. This makes life much easier for closeout and in an audit.
   vi. Send waivers to contractor through Notifications
l. PMWeb Word – no reports

m. BI reports– DucksUnlimited_ProgressInvoice_Report
n. Notes, Notifications – optional
o. Attachments – can be used with the contractor (contractor can upload/download as well as DU)
p. Submit to Workflow
    i. See Progress Invoice Approval Workflow – 4-7-2026.pdf for workflow flowchart.
    ii. CS-C will use DucksUnlimited_ProgressInvoice_Report with DocuSign to have contractor sign the progress invoice.
q. Future invoices –
    i. Navigate to previous Project Invoice, select Create Next
    ii. Same Process as above, but will have previous amounts shown
    iii. Do NOT pre-create progress invoices – it will snarl the formulas. **Same goes for contractors with project access.**
    iv. Withholding and Stored Materials must be manually modified for release

15. Vendor Prequal
    a. For those who wish to do business with DU, but are not currently companies in Portfolio→Companies, we have a separate PDF set of instructions.
        i. See Instructions_For_Vendors_To_Apply_For_Account.pdf for instructions to share with companies not currently in DU's PMWeb company database (Portfolio→Companies).
    b. Once they begin their application, they are entered as an External User, which is not a license. This only allows them access to their application record. They have to hit Submit to finalize their application.
    c. In Tools→Vendor Prequal Records, are the submitted records.
        i. Header information
        ii. Addresses
        iii. Contacts
        iv. Applications –
            1. Highlight the application
            2. Click Open Selected Line
            3. Brings up a popup of their application
        v. Departments, Insurance, Scoring, Ratings, Notes, Specifications not really used
    d. Process for review and approval
        i. Upon notification from a vendor (if they send one – not automatic) or at least weekly, CS-P goes into Tools→Vendor Prequal Records
        ii. Filter Status to move Draft records to the top.

iii. Click on the record # and check the home state.
iv. CS-P notify CO for that state or CS-P if contractor is in a different region that there is an application to review.
v. CO reviews record and application.
    1. If we want to add the company to DU's PMWeb database, change Status to Approved, save the record, and notify the CS-P.
    2. If we do not want to add the company, change the Status to Rejected and save the record.
vi. For Approved companies, the CS-P will see a checkmark appear by the printer icon



vii. Click and fill out to create company.
    1. Ensure when the company record is created that Type is selected appropriately and that Approved Bidder is checked in the Header record.
viii. Once the company is added to the DU PMWeb company database, that company will be able to bid on procurements they are invited to.