State of Maryland

Interagency Commission on School Construction

Business Management System

Contract Approval Report User Guide



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This guide is available for download at *iac.mdschoolconstruction.org*

Contract Approval Report in the BMS

Purpose: This guide will demonstrate how LEA users can navigate to the report module, run the Contract Approval Report, and export it from the system for your own records.

- 1. Log in to the IAC's Business Management System (BMS) consistent with the IAC Initial User Guide found on the <u>BMS</u> <u>Resource Landing Page</u>.
- 2. Once logged in and on your home screen, click on the tab titled "Reports" at the top of the page to enter the reports module.

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Home	Dashboard	Projects	Planning	Forms	Processes	Documents	Calendar	Contacts	Bidding	Cost	Schedule	Reports	Setup				

3. In the reports module, all LEA reports will be placed under the heading "LEA Reports":

Reports			
Filter			
	Folder:	All Report Folders	
	Report:	Clear	
Expand All Collapse All			Add Report
LEA Reports (1)			

4. Expand this section out by clicking on the carrot to view all the reports accessible to you under this heading and click on the name of the report you want to run. For contract approvals we want to run the "LEA Approved Contract Report":

LEA Reports (1)	
Edit Delete Export History	LEA Approved Contract Report

- 5. The report will immediately run, pulling all approved contracts regardless of the IAC meeting date. To set the filter to pull from a specific IAC meeting date:
 - a. Set the "Columns" dropdown to be "Date of IAC Approval"
 - **b.** Keep the "Duration" set to "Custom"
 - c. Enter the desired IAC meeting date in both the "Start Date" and "End Date"
 - d. Click on "Re-Run Report" at the top right of the "Report Options" section

Report Results

Report Options			d Re-Run Report
a Columns:	Date of IAC Approval	Sorting: Reset	Process Document
b Duration:	Custom v		
C Dates:	Start Date: 06.13.2024		Ascending O Descending
	End Date: 06.13.2024		Ascending Descending
LEA Approved Contract Report		Hide Details	Print View Send Export Edit Save As

- 6. You will be presented with all approved contracts matching the specified "Date of IAC Approval" grouped by project. To view an individual process to print out for your records, select the specific contract under the "Process Document" column header.
 - **a.** Clicking on this will bring up the process as a popup.

	LEA Approved Contract Report		Hide Deta	ails Print View	Send Export	Edit Save As		
	Filter By: Project Status equals Active, Complete, Inactive Date of IAC Approval has a value							
	Process Document*	PSC Number Company Name Recommended Recomm Local Funds State Fur		Recommended State Funds	Total Contract Amount	Total State Share % (Final)	Date of IAC Approval	
	Project Name:			80, 140, 200, 80	20, 110, 220, 20	M. (M. 601.00		
а	-CA #00001 -	02.108.24.15.804.0080/24 99022/25.8	Crime & Parker Rodmann	54427130	280.74.8	1.1.1.47.10		16.11.2124

- 7. There are (2) options for exporting a report:
 - a. "Print View" to preserve formatting. This will not carry over any of the hyperlinks.
 - **b.** "Export" to export the raw data with no formatting.

