

Invoicing Guide for
Newport News External Users
Project and Contract Management System
PCMS

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Introduction

The City of Newport News uses a web-based digital system to set up and manage construction and professional engineering services contracts. We call our system PCMS – the Project and Contract Management System. If you are a provider of construction or professional engineering services, your agreement with us will be managed in PCMS.

Up to now, PCMS has been used to generate invoices for your use by one of the City's Representatives (either Project Inspector or Engineer). You were then able to view and update the invoice, and submit it digitally.

You will now be provided instead with the ability to view our PCMS data related to your contracts and generate invoices directly.

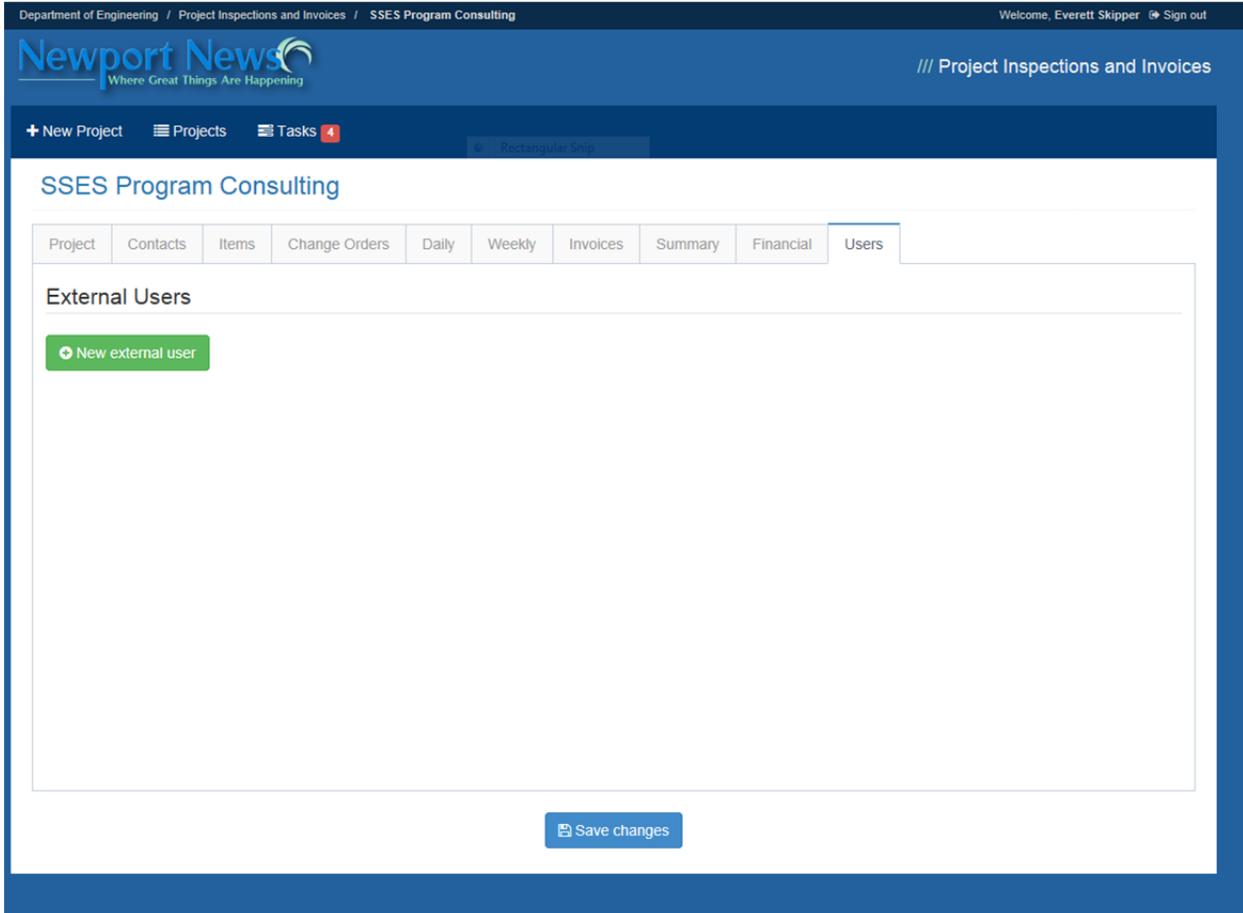
As before, you will not be able to change the system data (which includes the contract items and values, approved change orders/addenda, prior billing and current quantities as shown in daily reports if applicable). If daily reports are being filed for your project, the quantity information on those reports will be included in the invoice you generate. You will, as before, have the ability to edit the quantities or percentages completed as part of your review and submittal of the invoice. You can also attach supplemental documentation as needed to the invoice for submittal.

This guide describes how to register and how to generate and edit your invoice.

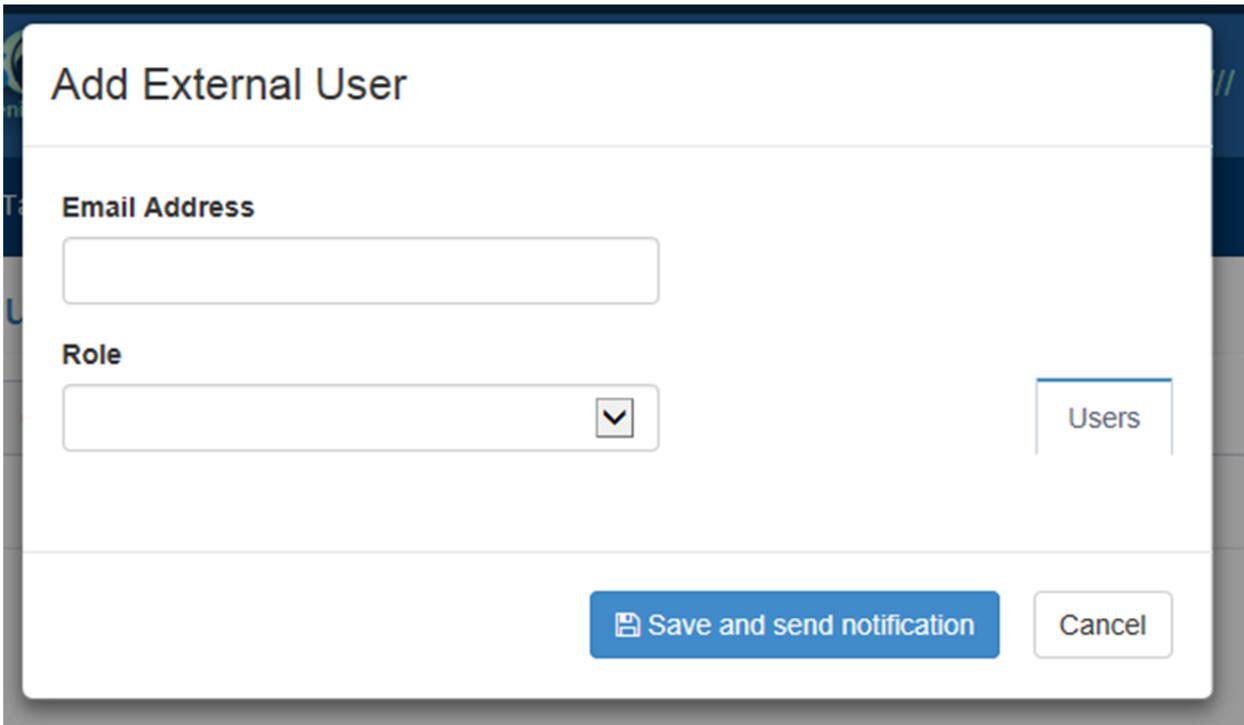
Questions should be directed to your City Project Representative.

Invitation to Register

You will be invited to register by the City representative. To prepare the invitation, the Representative enters the previously-established Project, where he will select the “Users” tab and will see the following screen.



By clicking on the “New External User” button, the Representative receives the following screen:

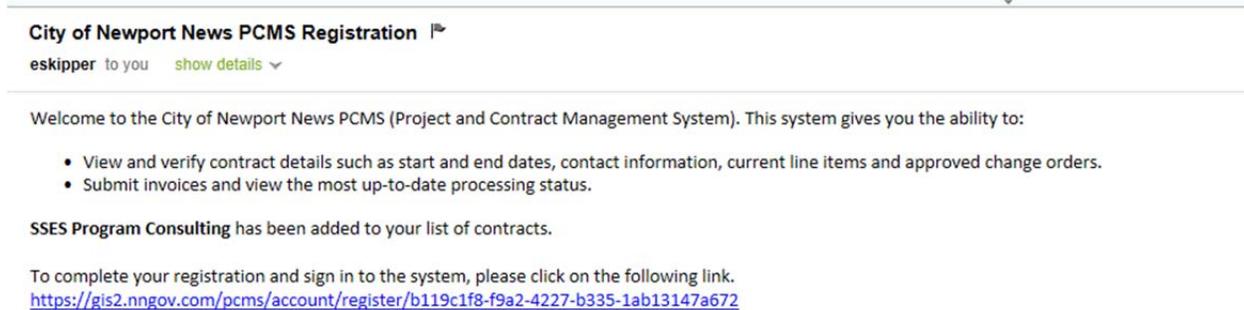


The screenshot shows a web form titled "Add External User". The form has a white background and is set against a dark blue header. It contains two main input fields: "Email Address" and "Role". The "Email Address" field is a simple text input box. The "Role" field is a dropdown menu with a downward arrow icon. To the right of the "Role" dropdown is a button labeled "Users". At the bottom of the form, there are two buttons: a blue button labeled "Save and send notification" with a document icon, and a white button labeled "Cancel".

On this screen, the Representative will input your email address and your role. Generally, the role will be as “Editor” which means that you can generate invoices. After the input, the Representative clicks the “Save and Send Notification Button”, which begins the External User side of the process by sending you an invitation and provides a notice to the Representative.

Registration

The External User will receive a message like the one below, inviting him to complete the registration process:



You will need to click on the link, which will direct you to a registration page similar to this:

The screenshot shows the registration page for the Project and Contract Management System (PCMS). The page features the Newport News logo at the top, followed by the title "Project and Contract Management System (PCMS)". Below this is a "Register" form with the following fields: "Full Name" (with a person icon), "Email Address" (pre-filled with "seainceps@aol.com" and an envelope icon), "Password" (with a key icon), and "Confirm Password" (with a key icon). A blue "Complete Registration" button with a right-pointing arrow is located at the bottom of the form.

You complete your registration by entering your name, then creating and confirming a password. (The email address is locked because it is the one you provided for contact and is now part of the system. If a change is needed you must contact your project representative). When you complete the form, click on the "Complete Registration" button and you will receive a confirmation message.

Accessing PCMS and Creating Invoices

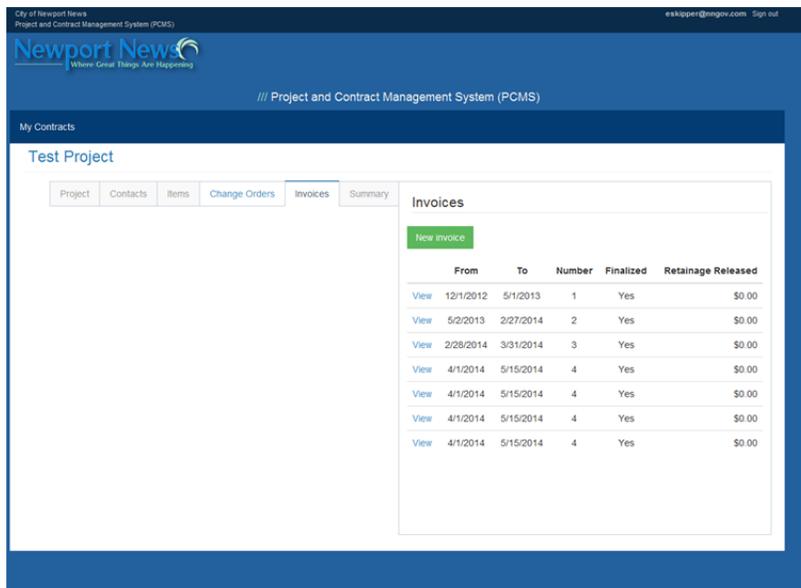
Login

You can now access the PCMS system from any internet-enabled computer by going to the site address of <https://gis2.nngov.com/PCMS> where you will receive a logon screen similar to the one below.



PCMS Tabs

After successfully signing in, you will be able to view your project main screen and select the “Invoices” tab as shown below.



	From	To	Number	Finalized	Retainage Released
View	12/1/2012	5/1/2013	1	Yes	\$0.00
View	5/2/2013	2/27/2014	2	Yes	\$0.00
View	2/28/2014	3/31/2014	3	Yes	\$0.00
View	4/1/2014	5/15/2014	4	Yes	\$0.00
View	4/1/2014	5/15/2014	4	Yes	\$0.00
View	4/1/2014	5/15/2014	4	Yes	\$0.00
View	4/1/2014	5/15/2014	4	Yes	\$0.00

The other tabs provide basic project information that has been pre-entered by your Representative.

Create Invoice

To create a new invoice, click on the “New Invoice” button on the right side of the screen. You will receive the first of four invoice entry screens as below:

City of Newport News
Project and Contract Management System (PCMS) eskipper@nngov.com Sign out

Newport News
Where Great Things Are Happening

/// Project and Contract Management System (PCMS)

My Contracts

New Invoice Test Project

- 1 Billing Period
- 2 Amount Due
- 3 Attachments and Notes
- 4 Verify and Submit

Step 1 - Billing Period

Specify the invoice number and time period that you want to bill for. The begin date is automatically calculated from either the contract start date or the day after the previous billing period.

Invoice Number

Begin Date

End Date

Project Complete / Final Invoice

[Next](#)

The Invoice Number will be prefilled with the next sequential number. The Begin date will be one day after the prior invoice or the contract start date, whichever is later. You should select the end date, and should indicate if this will be a final invoice. Tips for selecting the end date:

1. It is prudent to consult with the Project Inspector when preparing to create an invoice. For projects where daily reports are being completed by City staff, the end date defines which reports will be included. If a daily report is not yet filed but is within the date range, quantities will not appear on your draft invoice. You can add them, but it is more cumbersome than simply confirming that the daily report is entered.
2. Generally, you are entitled to bill monthly. Billing in shorter periods is possible but may result in your invoice being rejected or otherwise delayed. Billing in longer periods is also possible but will delay your earned payments.

Once the entries are completed, click “Next” to move on to Step 2.

Invoice Items and Amounts

City of Newport News / Project and Contract Management System (PCMS) eskipp@nmgov.com Sign out

Newport News
Where Great Things Are Happening

/// Project and Contract Management System (PCMS)

My Contracts

New Invoice > Test Project

1 Billing Period 2 Quantities Used 3 Attachments and Notes 4 Verify Amount Totals and Submit

Step 2 - Quantities Used

Verify the quantities of items used to date (06/02/2014). Click the edit button to add or adjust.

Item Description	Contract Quantity	Total Used To Date	Less Prior Invoices	Quantity This Invoice	Unit Price	Unit of Measure
<input type="checkbox"/> item 1 (update) test only item description	2	6	6	0	\$23,456.00	Claim
<input type="checkbox"/> item 2 (update)	10	2	2	0	\$9.00	MTH
<input type="checkbox"/> test CO	1	0.95	0.95	0	\$300,000.00	LS
<input type="checkbox"/> Test Item	100	100	100	0	\$3.33	EA
<input type="checkbox"/> Test Item 2	500	400	400	0	\$20.00	AC

On the second screen you will be shown the contract items and the quantities recorded by the system for the period included in your chosen date range, along with previously invoiced amounts and the total used through the end date you chose. If you are in agreement with these numbers, you can simply accept the quantities by clicking “Next” and moving on.

Modify Item Quantities

Item: Test Item

Contract Quantity: 100

Total Used To Date: 100

Less Prior Invoices: 100

Quantity This Invoice: 0

If you disagree with the quantities of any particular item, use the “Edit” icon to the left of the item description to enter the Modify Item Detail screen, similar to the one at left. On this screen, you can revise the quantity used that will be reflected on the new invoice. Quantities in excess of contract quantity may not be entered as they require a change order. Again, it is prudent to confer with the Representative regarding changes. Changes that are not consistent with the representative’s expectations or understanding may result in your invoice being rejected.

For most professional services contracts, your project does not include routinely filed daily reports and your current quantities will all initially be shown as zero. You may adjust each quantity to reflect your own internal draft invoicing. You will have an opportunity to attach any documents you feel appropriate. Again, it is prudent to coordinate with your Representative as they will be reviewing your invoice and disagreement may result in delay or rejection of your invoice.

Invoice Attachments and Notes

When you have completed any necessary edits, click the “Next” button to move to the third screen. On this screen you will add any attachments that may be needed or helpful (subcontractor invoice, certification of billings or others) and also provide notes on the progress of the project and any upcoming submittals, change orders or other critical issues.

The screenshot shows the 'New Invoice' form in the PCMS. The form is titled 'New Invoice' and 'Test Project'. It has a progress indicator with four steps: 1. Billing Period, 2. Amount Due, 3. Attachments and Notes (current step), and 4. Verify and Submit. Below the progress indicator, there is a section for 'Step 3 - Attachments and Notes' with a prompt: 'Provide appropriate backup documentation and comments.' The form contains several sections with text input fields: 'Attachments' with an 'Add attachment' button, 'Notice of Outstanding Issues', 'Schedule Status / Milestone Progress', 'Critical Submittals', 'Pending Change Orders', and 'Other'. At the bottom of the form, there are 'Previous' and 'Next' buttons.

It is expected that you will use this method to provide the project team with a brief overview of key project issues and items that may require attention.

When the attachments and notes are completed, click “Next” to move to the fourth screen.

Invoice Verify and Submit

The fourth and final screen is a view of the completed invoice as it will be submitted. If changes are necessary, click on the “Previous” button to return to Step 2 or 3 and make any adjustments

needed. When you have completed the invoice, click on “Submit to the City of Newport News” to digitally sign and submit your invoice.

You will receive a confirmation screen similar to the one below:

New Invoice > Test Project

1 Billing Period 2 Amount Due 3 Attachments and Notes 4 Verify and Submit

Step 4 - Verify and Submit

Verify the total due and send for review.

Summary

Original Contract Value	\$	10,333.00
Value of Approved Change Orders	\$	347,002.00
Current Contract Value	\$	357,335.00
Total Work Completed	\$	374,087.00
LESS: Retainage at 5%	\$	18,704.35
Retainage Released	\$	0.00
Total Payable	\$	355,382.65
LESS: Previous Approved Invoices	\$	355,382.65
BALANCE DUE	\$	0.00

As of 5/19/2014, this project is at

105% Value Expended

146% Time Expended

Contract Start Date: 12/1/2012
Contract Calendar Days to Completion: 365
Original Contract End Date: 12/1/2013
Calendar Days of Extension Approved: 0
Current Contract End Date: 12/1/2013

Previous Submit to the City of Newport News

The invoice has been successfully saved and sent for review

Okay

Conclusions

Your invoice will be digitally processed through the City’s systems, and you can expect issuance of your payment in accordance with your established contract payment terms.

If you experience problems or questions, please call your Project Representative. If a system issue is creating the problem, the Representative can coordinate a prompt repair or correction so that your invoice can be properly recorded and tracked.

Thank you for your assistance and cooperation.