PM4+

PM4 + Partners Knowledge Articles

Viewing and Signing Subcontracts and Major Purchase Orders for Subcontractors

R11

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Contents

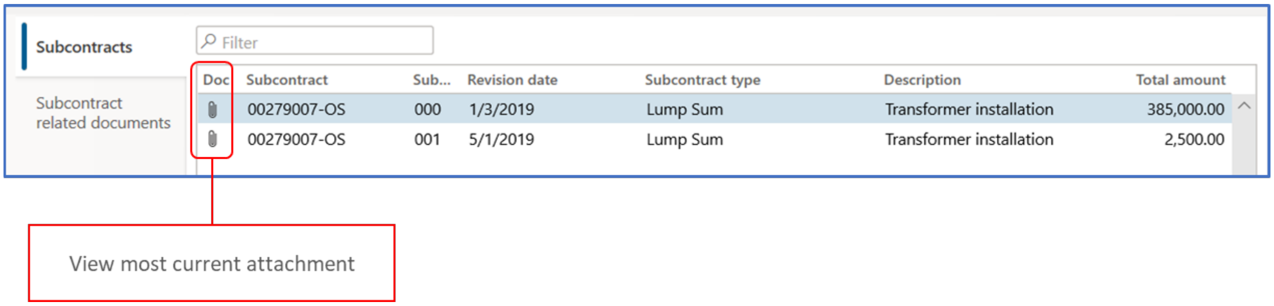
Viewing Subcontracts and Subcontract Related Documents

In PM4+, the log record holds the descriptive information for the subcontracts and the subcontract related documents (SRDs). You can view these logs through the Subcontract management workspace to see changes in your project. With an awareness of changes and how they affect your company's work on the project, you can respond quickly as needed.

Note: Major purchase orders are managed through the same process as subcontracts in PM4+. The activities described for subcontracts also apply to major purchase orders.

Viewing Subcontracts and Major Purchase Orders

You can view the list of Subcontract records for your company by selecting the **Subcontracts** tabbed list in the **Subcontract management** workspace.



Note: Subcontracts are denoted by an “OS” suffix in the subcontract number; major purchases are denoted by an “OM” instead.

Viewing the Subcontract attachment

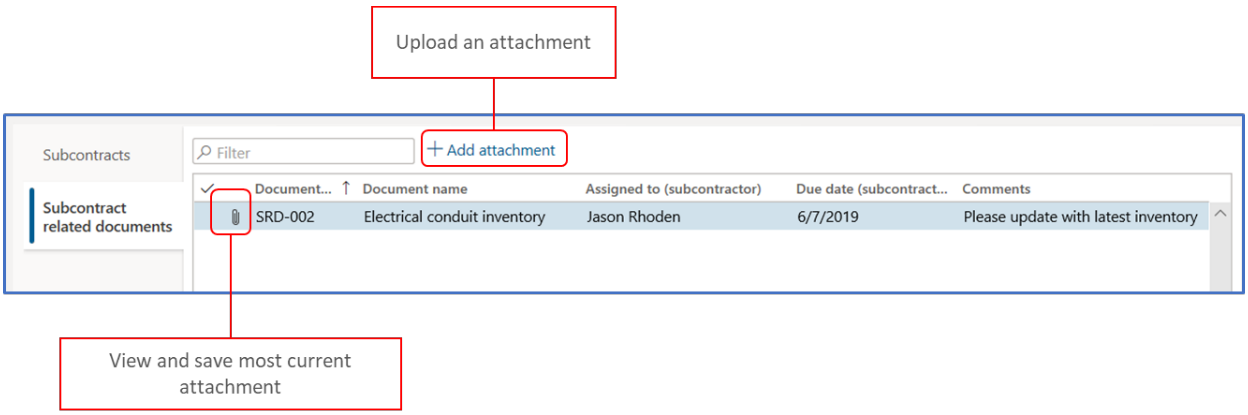
You can view the most current subcontract revision by downloading it:

1. From the **Subcontract management (external)** workspace, open the **Subcontracts** tabbed list.
2. Select the paperclip icon (📎) for the subcontract you want to view.

   Depending on your browser settings, you may be prompted to open or save the document; or it is downloaded to your **Downloads** folder with a link in the footer for the browser.
3. Save the document

Viewing Subcontract Related Documents

You can view the list of Subcontract related document records for your company by selecting the **Subcontract related documents** tabbed list in the **Subcontract management (external)** workspace. The only information available is displayed on the log view. The instructions for the action required for the SRD are included in the email notification sent to you.



Viewing the attachment

You can view the most current attachment for the SRD by downloading it:

1. From the **Subcontract management (external)** workspace, open the **Subcontract related documents** tabbed list.
2. Select the paperclip icon (📎) for the document you want to view.

   Depending on your browser, you are prompted to open or save the document; or it is downloaded to your **Downloads** folder with a link in the footer for the browser.
3. Save the document
4. Make any changes or updates as recommended in the email notification received from PCL.

Adding an attachment

Often, you are requested to update and then upload a revision of the attachment.

1. From the **Subcontract management (external)** workspace, open the **Subcontract related documents** tabbed list.
2. Select the **Add attachment** link.
3. **Browse** to the file to upload.

   The **File name** field fills in with the name for the file. You can update this field as needed.
4. (Optional) Add any **Comments** or notes.
5. Click **OK**

Signing Subcontracts and Major Purchase Orders with SignNow

When subcontracts are sent for signatures from PM4+, they are handled by SignNow, a legally recognized e-signature technology. SignNow sends out email requests for signatures.

As always, exercise caution when opening emails, links, and attachments associated with electronic signatures. If you receive a suspicious or malicious signature email request, contact your project manager or cybersecurity@pcl.com

Signing with SignNow

If you receive an email requesting a signature for a subcontract from SignNow, complete the following steps:

1. Open the link in the email provided by SignNow.

   The SignNow page for the corresponding document opens with a summary of what to complete.

2. Review the documents and attachments.
3. Select a signing field.
4. Enter you signature using one of the following options:
   - Draw your signature with a mouse
   - Select a font to apply and type in your signature
   - Scan and upload a copy of your signature
5. Complete all required fields.
6. Select **Done** in the top-right corner to submit your signature.

   For more information about signing your signature with SignNow, see: https://www.signnow.com/features/easily-sign-documents-online

   Once you have signed or forwarded the document, it will be sent to the PCL representative or your designate for their signature.

Forwarding a Signature Request to a Different Signer

If you receive an email requesting a signature, you can forward it to a different signer.

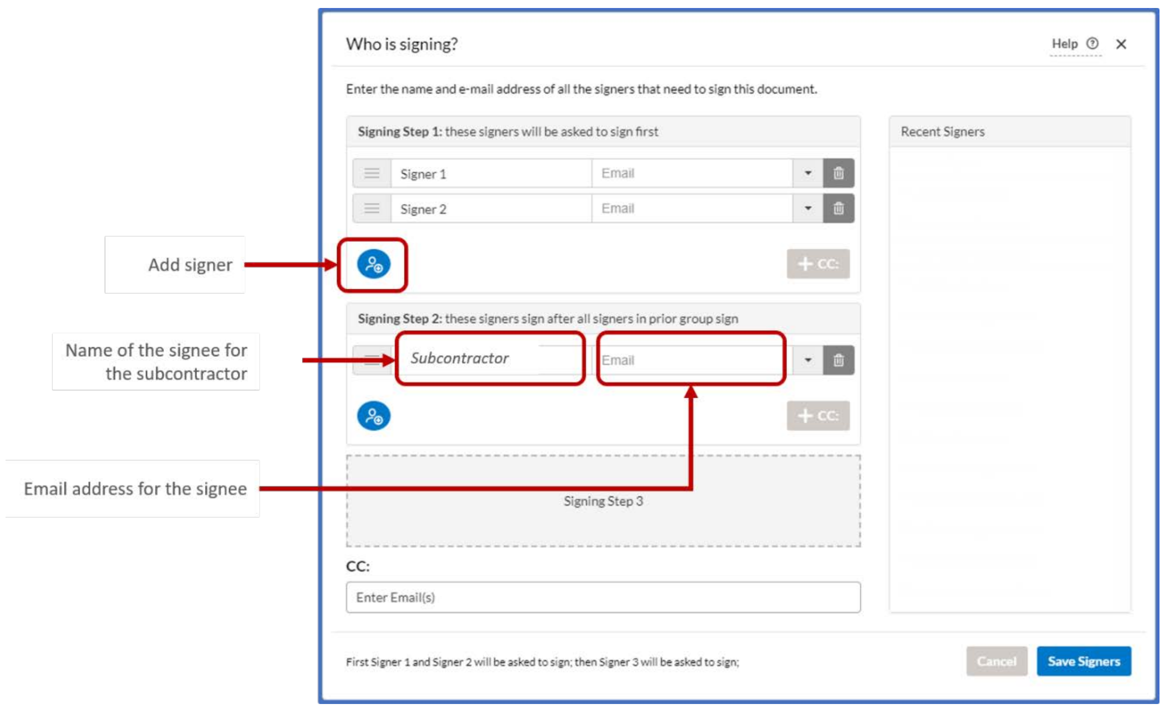
1. Open the link in the email provided by SignNow.
2. Select **Edit Signers** in the upper-left column.

   The "Who is signing" dialog opens.
3. For **Signing Step 1**, select the **Add Signer** icon.

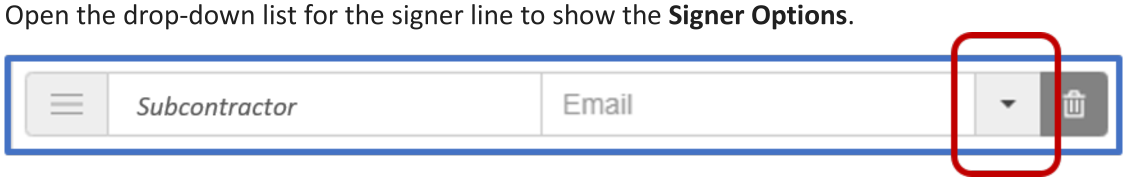
   

   A new signer line is added to the list of **Signing Step 1** signers.
4. Enter the following information for the new signer:
   a. In the **Role** name field, enter the name of the person who will be signing for the *Subcontractor*
   b. Add an email address for the signer.

      Note: Any roles without an email address are considered unassigned and cannot be sent.



   c. Open the drop-down list for the signer line to show the **Signer Options**.



   d. Select the first option if the new signer will be sending the document to the other signers in the list in the order in which they are displayed.
      The second option allows the new signer to decline the signature.

   e. Select **Delete** to remove the line for the signer who is not available.

5. When finished, review the information in the summary section at the bottom of the form.
6. Once you confirm all the information, select **Save Signers**