A Guide On

Change Order (CO)

Prepared by UCF / e-Builder
14 February 2022

e-Builder®

| Dashboard | Projects | Forms | Processes | Documents | Calendar | Contacts | Bidding | Cost | Schedule | Reports |

e-Builder

Process Description:

The purpose of this process is to bundle PCOs and kicking off a change order to be routed for approval. This process is automatically initiated by the PCO process only.

Process Participants:

1. Automatically initiated by another process only via "Spawn" step.

Process Details:

1. After the submission of the potential change order the process will route to the PM for review.

2. The PM will Review and Sign the process then take the Signed action to move the process forward.

3. A Mail Merge document displaying the signatures will be generated.

4. The Account Supervisor will Review and add info to PeopleSoft then take the action PS Complete. The approve CO mail merge document with signatures will generate. The process will then move to finish.

e-Builder®

| Dashboard | Projects | Forms | Processes | Documents | Calendar | Contacts | Bidding | Cost | Schedule | Reports | + |

Initiation of Process:

1. This process is only initiated by the "**Spawn**" step in the Potential Change Order Process.
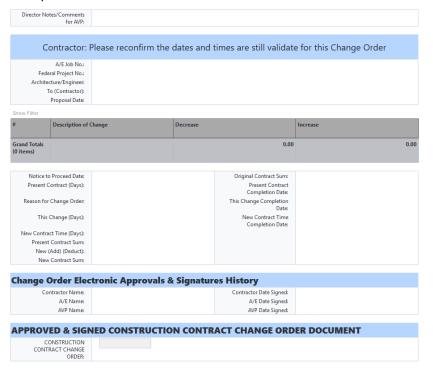
PM Review & Sign:

1. Click process name to open **Change Order (CO).**

2. Review the information, Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

3. Select an action and click **Take Action** button to move process along; possible actions are:

   a. **Print CO**– Select this action if all information is entered and process is ready to move forward.
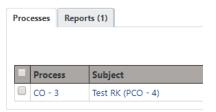
   b. **Void**– Select this action to cancel the CO.

Accounting Supervisor Add to PeopleSoft:

1. Click process name to open **Change Order (CO).**
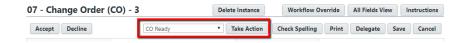

2. Review the information, Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.
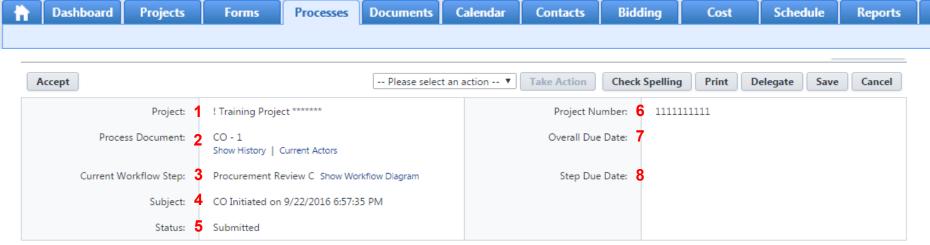

3. Select an action and click **Take Action** button to move process along; possible actions are:

   a. **PeopleSoft Work Complete**– Select this action if all information is entered and process is ready to move forward.

| Dashboard | Projects | Forms | **Processes** | Documents | Calendar | Contacts | Bidding | Cost | Schedule | Reports | + |

Accept   -- Please select an action -- ▼   **Take Action**   **Check Spelling**   **Print**   **Delegate**   **Save**   **Cancel**

Project:	**1** ! Training Project *******	Project Number: **6** 1111111111
Process Document:	**2** CO - 1 Show History | Current Actors	Overall Due Date: **7**
Current Workflow Step:	**3** Procurement Review C Show Workflow Diagram	Step Due Date: **8**
Subject:	**4** CO Initiated on 9/22/2016 6:57:35 PM	
Status:	**5** Submitted	

Process Description:

Each time you open a process to perform your function within a project, you will see the Process Header. The process header contains information that can help you identify where you are within a process, within a project.

1. **Project:** Project Name

2. **Process Document:** The process instance
    - **Show History**: Will display a historical list of actions taken within this process instance
    - **Current Actors**: Will display a list of actors responsible for the process in its current step

3. **Current Workflow Step:** The name of the current step
    - **Show Workflow Diagram**: Will display the workflow diagram, highlighting the current step where this instance is with a blue frame

4. **Subject:** Displays the specific process instance subject

5. **Status:** Displays the process' current status

6. **Project Number:** Displays the project number

7. **Overall Due Date:** Date the process needs to be completed by *(If applicable)*

8. **Step Due Date:** Date this step in the process needs to be completed by *(If applicable)*

e-Builder ®

| 🏠 | Dashboard | Projects | Forms | Processes | Documents | Calendar | Contacts | Bidding | Cost | Schedule | Reports | + |

UCF

Support:

Training Resources
Please visit the FP&C website for a variety of e-Builder training resources both in print and video.
http://fp.ucf.edu/resources/ebuilder/

Need e-Builder Help?
Please call (888) 288-5717 or email support@e-builder.net. Thank you!

For UCF Project Support
e-Builder System Admins can be reached at eBuilderadmin@ucf.edu

Notes and Comments: