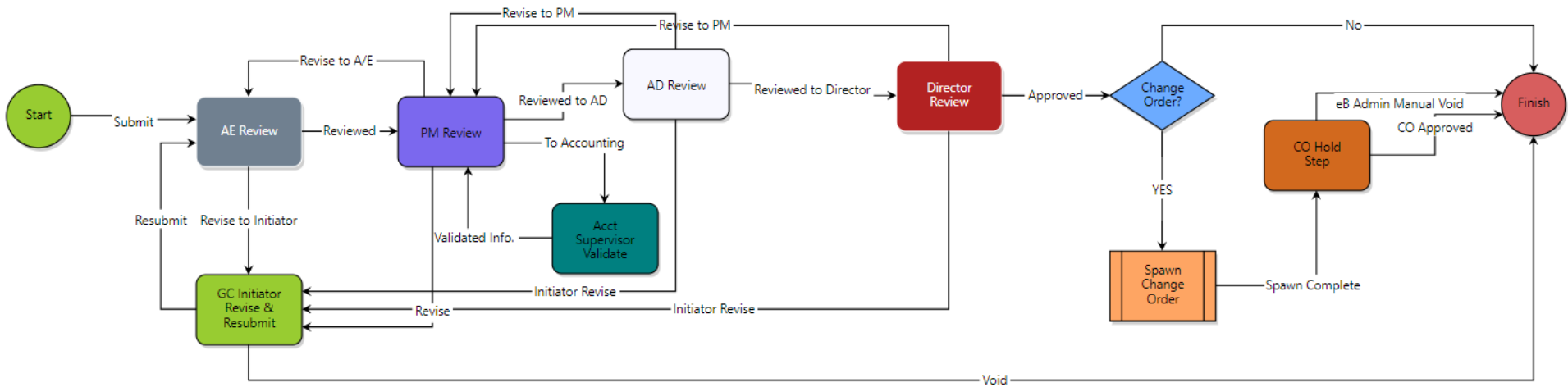




A Guide On Potential Change Order (PCO)

*Prepared by e-Builder
13th February 2018*



Process Description:

The purpose of the Potential Change Order (PCO) process is for receiving potential change orders (Addendum & Add Services). This process will be used in conjunction with the Change Order (CO) process for bundling multiple PCOs into a single CO. This process is initiated by the GC (Primary, Secondary, Tertiary).

Process Participants:

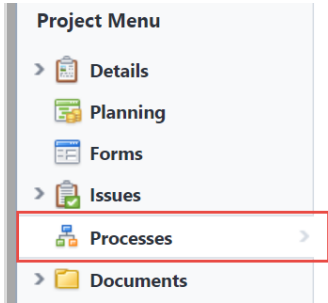
1. GC Primary
2. GC Secondary
3. GC Tertiary

Process Details:

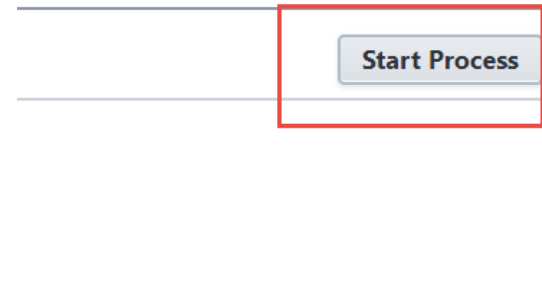
1. After the submission of the potential change order the process will route to the AE for review.
2. The AE reviews the process and can revise with comment back to the initiator. The AE can also take the "Reviewed" action and move the process forward.
3. The PM receives the process and can revise with comment to the AE or initiator. The PM can forward to accounting for input or take the review action moving the process forward.
4. The AD can revise with comment back to the PM or the initiator. The AD can take the reviewed action and move the process forward.
5. The Director can revise with comment back to the PM or Initiator. The Director can approve the process forward.
6. Spawn change order step moves the process to the initiator's court to execute the Change Approval process.
7. CO Hold Step. This step requires no actor take action. Instead, the approval/completion of the Change Approval process will move this process instance from the hold step to the finish step.
8. Note: the eB admin has the ability to void the process when in this step if it was reached in error.

Initiation of Process:

1. Click process name to open **Potential Change Order (PCO)**.
2. Select **Processes** from the Project Menu.



3. Select **Start Process** in the process Module.



4. Click **Potential Change Order Process (PCO)** button.

06 - Potential Change Order (PCO)	This process is for receiving potential change orders (Addendum & Add Services). This process will be used in conjunction with the Change Order (CO) process for bundling multiple PCOs into a single CO.
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GC Input:

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

Processes		Reports (0)	
Process	Subject	Step	
<input type="checkbox"/> PCO - 6	Test	Start	

2. Scroll and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Project:	06 - Potential Change Order	Overall Due Date:	
Process Document:		Step Due Date:	
Current Workflow Step:			
* Subject:	<input type="text"/>		
Tracking Prefix:	<input type="text"/>		
Status:			

Required attachments:

1. Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.
2. Updated Budget Reconciliation.
3. CCD, RFI, ASI, SK, plans and/or specifications, as applicable.
4. Updated project schedule, as applicable.

* Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers:	<input type="text"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
* Updated Budget Reconciliation:	<input type="text"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
* CCD, RFI, ASI, SK, plans and/or specifications, as applicable:	<input type="text"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
* Updated project schedule, as applicable:	<input type="text"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>

Justification

Project ID Number:	left intentionally blank
Schedule Impact (Days):	<input type="text"/>
Is this E&O (errors & omissions)?:	<input type="radio"/> Yes <input type="radio"/> No
CONTRACT - Explain why this Change Order Request is not part of the original Contract:	<input type="text"/>
Justification - Explain why this Change Order Request is necessary:	<input type="text"/>
EFFECT ON PROJECT - Provide the effect(s) on operations, maintenance, cost, and schedule:	<input type="text"/>

3. Select an action and click **Submit** button to move process along; possible actions are:
 - a. **Submit** – Select this action if all information is entered and process is ready to move forward.

Start Process

AE Review:

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

Processes		Reports (0)	
<input type="checkbox"/>	Process	Subject	Step
<input type="checkbox"/>	PCO - 6	Test	Start

2. Scroll to review and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Attachments, as required:

1. Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.
2. Updated Budget Reconciliation.
3. CCD, RFI, ASI, SK, plans and/or specifications, as applicable.
4. Updated project schedule, as applicable.

Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.:	<input type="text"/>
Updated Budget Reconciliation:	<input type="text"/>
CCD, RFI, ASI, SK, plans and/or specifications, as applicable.?	<input type="text"/>
Updated project schedule, as applicable.:	<input type="text"/>

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **Reviewed to PM**– Select this action if all information is correct and process is ready to move forward.
 - b. **Revise to Initiator/AE** – Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action
 - c. **Forward to Accounting**-Select this action if after reviewing the information entered.

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Initiator Revise:

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

Processes		Reports (0)	
Process	Subject	Step	
PCO - 6	Test	Start	

2. Review comments by selecting the **Comments** tab.

Details **Comments (1)** Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Request Comment Comment

Private Comment

Make Private These are the comments

Request Comment Comment

Required attachments:

1. Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.
2. Updated Budget Reconciliation.
3. CCD, RFI, ASI, SK, plans and/or specifications, as applicable.
4. Updated project schedule, as applicable.

* Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
* Updated Budget Reconciliation:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
* CCD, RFI, ASI, SK, plans and/or specifications, as applicable: ?	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
* Updated project schedule, as applicable:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>

3. Scroll and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Justification

Project ID Number: left intentionally blank

Schedule Impact (Days):

Is this E&O (errors & omissions)?: Yes No

CONTRACT - Explain why this Change Order Request is not part of the original Contract:

Justification - Explain why this Change Order Request is necessary:

EFFECT ON PROJECT - Provide the effect(s) on operations, maintenance, cost, and schedule:

06 - Potential Change Order (PCO) - 6

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

- Resubmit** – Take this action once all comments have been addressed and all information in the process has been updated accordingly.
- Void** – Process is no longer needed and routes to finish in a Void status.

PM Review:

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

Processes		Reports (0)	
Process	Subject	Step	
PCO - 6	Test	Start	

2. Review the following information:

Attachments, as required:

1. Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.
2. Updated Budget Reconciliation.
3. CCD, RFI, ASI, SK, plans and/or specifications, as applicable.
4. Updated project schedule, as applicable.

Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers:

Updated Budget Reconciliation:

CCD, RFI, ASI, SK, plans and/or specifications, as applicable:

Updated project schedule, as applicable:

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **Reviewed to AD** – Select this action if all information is entered and process is ready to move forward.
 - b. **Forward to Accounting**-Select this action if all information is entered but additional info is needed before the process can move forward.
 - c. **Revise to A/E or Initiator**-Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

06 - Potential Change Order (PCO) - 6

Delete Instance

Workflow Override

All Fields View

Instructions

-- Please select an action --

Take Action

Check Spelling

Print

Copy

Delegate

Save

Cancel

AD Review:

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

Processes		Reports (0)	
<input type="checkbox"/>	Process	Subject	Step
<input type="checkbox"/>	PCO - 6	Test	Start

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

Attachments, as required:

1. Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.
2. Updated Budget Reconciliation.
3. CCD, RFI, ASI, SK, plans and/or specifications, as applicable.
4. Updated project schedule, as applicable.

Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers:

Updated Budget Reconciliation:

CCD, RFI, ASI, SK, plans and/or specifications, as applicable: [?](#)

Updated project schedule, as applicable:

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

- a. **Reviewed to Director** – Select this action if all information is entered and process is ready to move forward.
- b. **Revise to PM or Initiator**-Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

06 - Potential Change Order (PCO) - 6

Delete Instance

Workflow Override

All Fields View

Instructions

-- Please select an action --

Take Action

Check Spelling

Print

Copy

Delegate

Save

Cancel

Director Review:

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

Processes		Reports (0)	
Process	Subject	Step	
<input type="checkbox"/> PCO - 6	Test	Start	

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

Redline Instructions:

1. If using the Redline tool on the attachments, click the Redline link beneath the file name.
2. Once the new window appears with the file content on the screen, click the Annotate button to start marking up the file.
3. When complete, click the Annotate drop down menu and select Save
4. Give the annotation layer a name and click OK.
5. Close the window.

Reviewing Redline Markups (marked up documents will be denoted with a number next to the word "Redline" - For example, Redline (1) to denote there is only 1 layer of markups.

1. Click on "Redline (X)"
2. Click on the Annotate drop down menu and select OPEN
3. Click on the checkbox next to the markup file you wish to view from the list

If you wish to mark up the existing file, you can do so.

- If you wish to save the markup onto the existing file, click SAVE.
- If you wish to save the markup onto another layer, click SAVE AS, name the new layer, then click OK.

Subconsultant Billing:

Reimbursables:

Contractor - Is This a Final Completion?:

PM - Is This a Final Completion?:

Commitment Invoice Details

Status: Draft

* Commitment:

* Invoice Number:

* Date Received: 02.09.2018 (02.09.2018)

This is a retainage release:

Company/Contact:

Date Due:

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **Approved**– Select this action if all information is entered and process is ready to move forward.
 - b. **Revise to PM or Initiator**-Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

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CO Hold Step:

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

Processes		Reports (0)	
Process	Subject	Step	
PCO - 6	Test	Start	

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

Redline Instructions:

1. If using the Redline tool on the attachments, click the Redline link beneath the file name.
2. Once the new window appears with the file content on the screen, click the Annotate button to start marking up the file.
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Subconsultant Billing:

Reimbursables:

Contractor - Is This a Final Completion?:

PM - Is This a Final Completion?:

Commitment Invoice Details

Status: Draft

Commitment:

Invoice Number:

Date Received: 02.09.2018 (02.09.2018)

This is a retainage release:

Company/Contact:

Date Due:

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

- a. **CO Approve Closeout**– Select this action if all information is entered and process is ready to move forward.
- b. **eB Admin Void** – Select this action if all information is entered and process is ready to move forward.

- a. Note: It is NOT necessary for anyone to push this step to the finish. This process will conclude once this process instance has been approved in the Change Order Approval process.

06 - Potential Change Order (PCO) - 6

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

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

Support:

Announcements ▾

To contact e-Builder Support
Please call (888) 288-5717 or email support@e-builder.net. Thank you!

Notes and Comments: