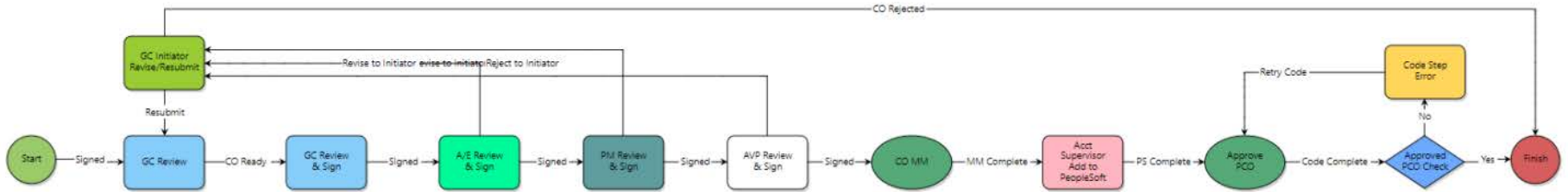




A Guide On Change Order (CO)

*Prepared by e-Builder
13th February 2018*



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 GC for review.
2. The GC will review the process and take the action Co Ready to move the process forward.
3. The GC Review and Sign taking the action Signed to move the process forward. .
4. The AE will Review and Sign the process then take the Signed action to move the process forward.
5. The PM will Review and Sign the process then take the Signed action to move the process forward.
6. The AVP will Review and Sign the process then take the Signed action to move the process forward. A Mail Merge document displaying the signatures will be generated.
7. The Account Supervisor will Review and add info to People Soft then take the action PS Complete. The approve CO mail merge document with signatures will generate. The process will then move to finish.

Initiation of Process:

1. This process is only initiated by the “**Spawn**” step in the Potential Change Order Process.



GC Review:

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

Processes **Reports (1)**

Process	Subject
<input type="checkbox"/> CO - 3	Test RK (PCO - 4)

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.

A/E Job No:
Federal Project No:
Architecture/Engineer:
To (Contractor):
Proposal Date:

Show Filter

#	Description of Change	Decrease	Increase
Grand Totals (0 Items)			

Notice to Proceed Date:
Present Contract (Days):
This Change (Days):
New Contract Time (Days):
Present Contract Sum:
New (Add) (Deduct):
New Contract Sum:

Original Contract Sum:
Present Contract Completion Date:
This Change Completion Date:
New Contract Time Completion Date:

A/E Job No:
Federal Project No:
Architecture/Engineer:
To (Contractor):
Proposal Date:

Show Filter

#	Description of Change	Decrease	Increase
Grand Totals (0 Items)			

Notice to Proceed Date:
Present Contract (Days):
This Change (Days):
New Contract Time (Days):
Present Contract Sum:
New (Add) (Deduct):
New Contract Sum:

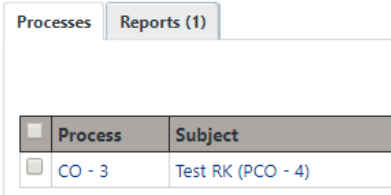
Original Contract Sum:
Present Contract Completion Date:
This Change Completion Date:
New Contract Time Completion Date:

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

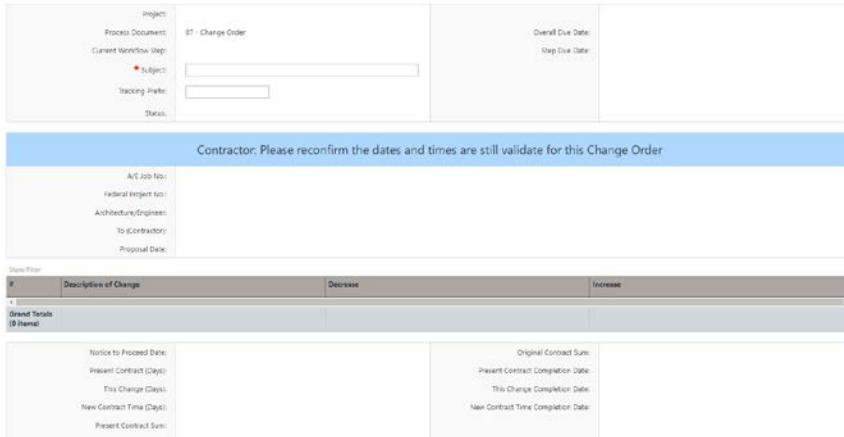
GC Review and Sign:

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



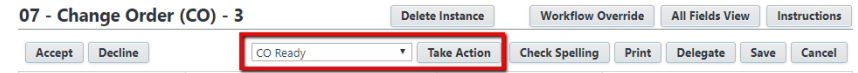
Process	Subject
CO - 3	Test RK (PCO - 4)

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.



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

- a. **Sign**– Select this action if all information is correct and process is ready to move forward.



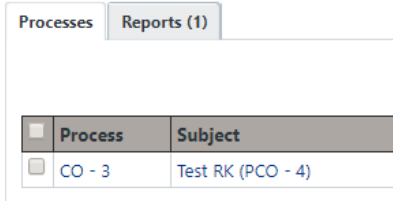
07 - Change Order (CO) - 3

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CO Ready
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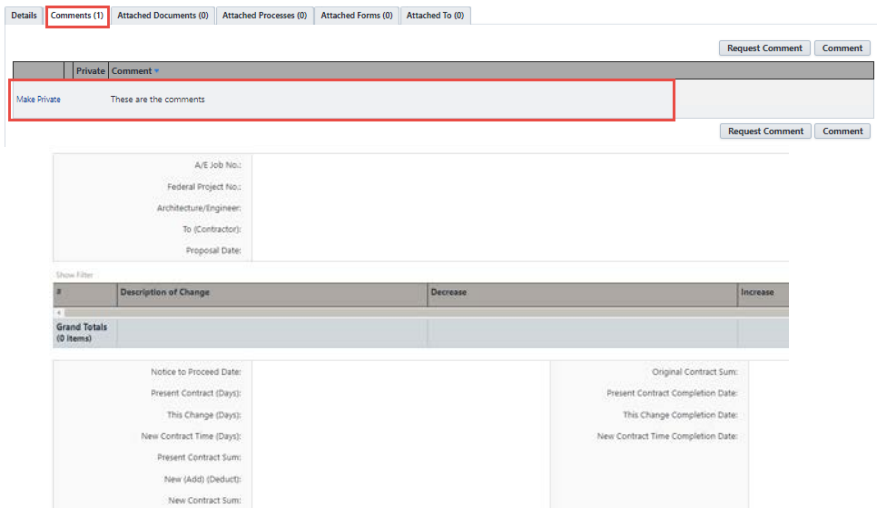
Initiator Revise:

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



Process	Subject
CO - 3	Test RK (PCO - 4)

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

A/E Job No.:
Federal Project No.:
Architecture/Engineer:
To (Contractor):
Proposal Date:

#	Description of Change	Decrease	Increase
Grand Totals (0 Items)			

Notice to Proceed Date:
Present Contract (Days):
This Change (Days):
New Contract Time (Days):
Present Contract Sum:
New (Add) (Deduct):
New Contract Sum:

Original Contract Sum:
Present Contract Completion Date:
This Change Completion Date:
New Contract Time Completion Date:

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.



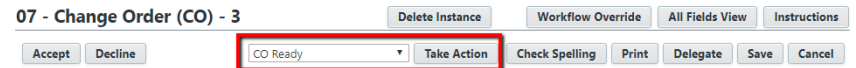
A/E Job No.:
Federal Project No.:
Architecture/Engineer:
To (Contractor):
Proposal Date:

#	Description of Change	Decrease	Increase
Grand Totals (0 Items)			

Notice to Proceed Date:
Present Contract (Days):
This Change (Days):
New Contract Time (Days):
Present Contract Sum:
New (Add) (Deduct):
New Contract Sum:

Original Contract Sum:
Present Contract Completion Date:
This Change Completion Date:
New Contract Time Completion Date:

07 - Change Order (CO) - 3



Delete Instance Workflow Override All Fields View Instructions

Accept Decline **CO Ready** **Take Action** Check Spelling Print Delegate Save Cancel

3. Select an action and click **Take Action** button to move process along; possible actions to take are:
 - a. **Resubmit** – Take this action once all comments have been addressed and all information in the process has been updated accordingly.

AE Review & Sign:

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

Processes		Reports (1)
<input type="checkbox"/>	Process	Subject
<input type="checkbox"/>	CO - 3	Test RK (PCO - 4)

2. Review the following information:

A/E Job No.:
Federal Project No.:
Architecture/Engineer:
To (Contractor):
Proposal Date:

Show Filter

#	Description of Change	Decrease	Increase
Grand Totals (0 items)			

Notice to Proceed Date:

Present Contract (Days):

This Change (Days):

New Contract Time (Days):

Present Contract Sum:

New (Add) (Deduct):

New Contract Sum:

Original Contract Sum:

Present Contract Completion Date:

This Change Completion Date:

New Contract Time Completion Date:

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

- a. **Sign**– Select this action if all information is entered and process is ready to move forward.

07 - Change Order (CO) - 3

Delete Instance
Workflow Override
All Fields View
Instructions

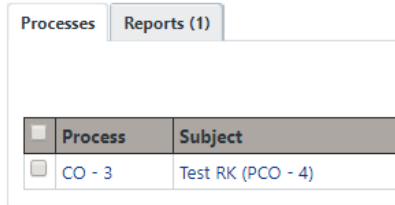
Accept
Decline

CO Ready ▾
Take Action

Check Spelling
Print
Delegate
Save
Cancel

PM Review & Sign:

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



Process	Subject
<input type="checkbox"/> CO - 3	Test RK (PCO - 4)

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



AVE Job No:
 Fiscal Project No:
 Act/Action/Trigger:
 To (Contract):
 Project Date:

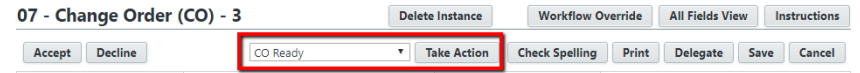
ID	Description of Change	Denote	Denote
Grand Totals (0 items)			

Notice to Proceed Date:
 Revised Contract (Days):
 This Change (Days):
 New Contract Time (Days):
 Revised Contract Sum:
 New (Add) Contract:
 New Contract Sum:

Original Contract Sum:
 Revised Contract Completion Date:
 This Change Completion Date:
 New Contract Time Completion Date:

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

- a. **Sign**– Select this action if all information is entered and process is ready to move forward.



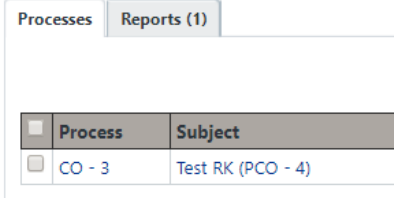
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AVP Review & Sign:

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



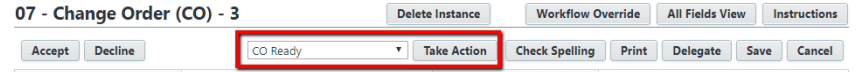
Process	Subject
CO - 3	Test RK (PCO - 4)

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. **Sign**– Select this action if all information is entered and process is ready to move forward.



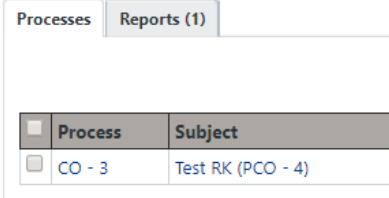
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[Take Action](#)
[Check Spelling](#)
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CO Hold Step:

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



Process	Subject
<input checked="" type="checkbox"/> CO - 3	Test RK (PCO - 4)

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



A/E Job No:
 Federal Project No:
 Jurisdiction/Region:
 No. Contractors:
 Proposal Date:

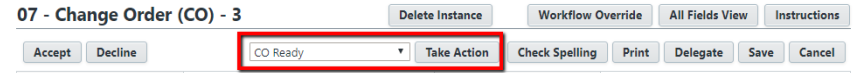
+	Description of Change	Decrease	Increase
Grand Totals			
0 Items			

Notice to Proceed Date:
 Revised Contract Sum:
 New Change Order:
 New Contract Term (Days):
 Revised Contract Sum:
 New (Add) Contract:
 New Contract Sum:

Original Contract Sum:
 Revised Contract Completion Date:
 New Change Completion Date:
 New Contract Term Completion Date:

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

- a. **Sign**– Select this action if all information is entered and process is ready to move forward.



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Accept
Decline
CO Ready
Take Action
Check Spelling
Print
Delegate
Save
Cancel

-- Please select an action -- ▾

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