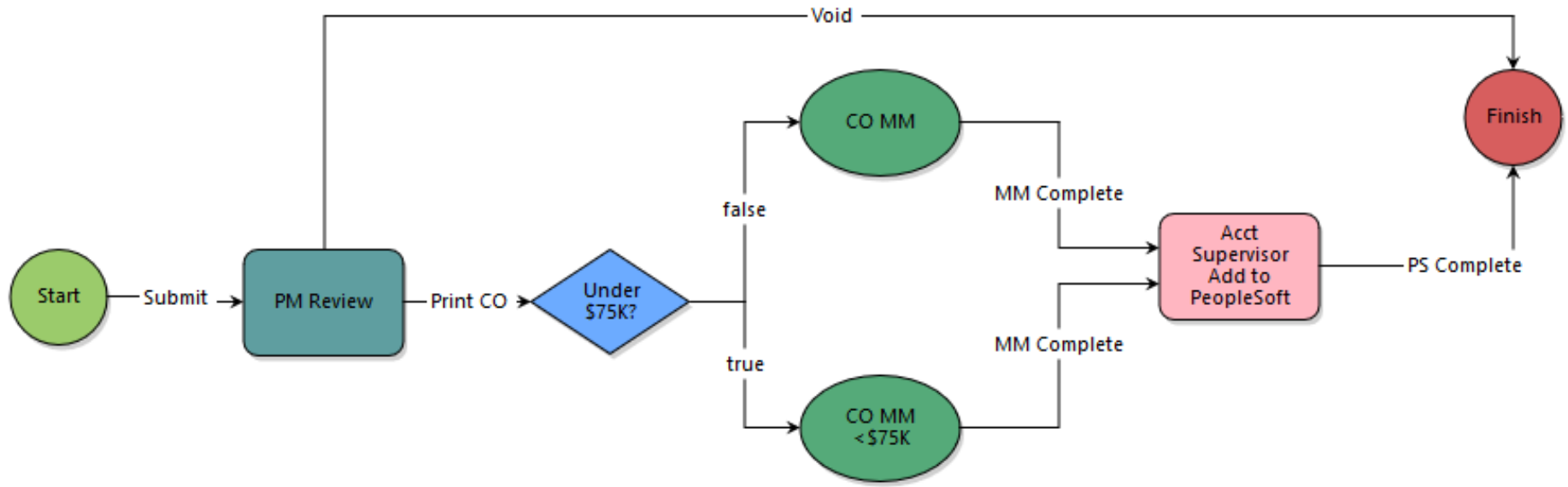




# A Guide On Change Order (CO)

*Prepared by UCF / e-Builder  
14 February 2022*



## 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.

## 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)**.

Processes		Reports (1)
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.

Director Notes/Comments for AVP:

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**Contractor: Please reconfirm the dates and times are still validate for this Change Order**

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

Show Filter

#	Description of Change	Decrease	Increase
<b>Grand Totals (0 Items)</b>		0.00	0.00

Notice to Proceed Date: Present Contract (Days):  Reason for Change Order:  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:
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**Change Order Electronic Approvals & Signatures History**

Contractor Name: A/E Name: AVP Name:	Contractor Date Signed: A/E Date Signed: AVP Date Signed:
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**APPROVED & SIGNED CONSTRUCTION CONTRACT CHANGE ORDER DOCUMENT**

CONSTRUCTION CONTRACT CHANGE ORDER:	
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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.

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[Delete Instance](#)
[Workflow Override](#)
[All Fields View](#)
[Instructions](#)

[Accept](#)
[Decline](#)
CO Ready
[Take Action](#)
[Check Spelling](#)
[Print](#)
[Delegate](#)
[Save](#)
[Cancel](#)

## Accounting Supervisor Add to PeopleSoft:

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

Processes		Reports (1)
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.

### APPROVED & SIGNED CONSTRUCTION CONTRACT CHANGE ORDER DOCUMENT

CONSTRUCTION CONTRACT CHANGE ORDER:	<input type="text"/>
* PS Update Complete:	Has the PO been updated in People Soft? <input type="checkbox"/> Yes

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.

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<input type="button" value="Accept"/>	<input type="button" value="Decline"/>	CO Ready ▾	<input type="button" value="Take Action"/>	<input type="button" value="Check Spelling"/>	<input type="button" value="Print"/>	<input type="button" value="Delegate"/>	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
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-- Please select an action -- ▾

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

**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](mailto:support@e-builder.net). Thank you!

**For UCF Project Support**

e-Builder System Admins can be reached at [eBuilderadmin@ucf.edu](mailto:eBuilderadmin@ucf.edu)

**Notes and Comments:**