

CHANGE ORDER

Oracle Unifier Business Process User Guide



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1. Business Process Overview

Shell Level	Project Level	
Workflow	Yes	
Connected BPs	Project Change Request Design Change Notice Non-Conformance Report Request for Information Correspondence	Issues Purchase Orders List of Values Cost Sheet Risks
Partner User Access	Yes	

1.1 Understanding Change Orders

A Change Order (CO) is a formal request to modify the original terms of a project. This process enables internal SC employees and partner users to manage changes in scope, cost, or schedule and ensures that all stakeholders are informed and agree to the modifications.

- **Efficient Change Management:** The process offers a dual workflow system tailored for both External Partner Users and Internal SC Employees, ensuring that changes are managed effectively. It includes a structured documentation and approval mechanism that tracks changes, providing transparency and accountability.
- **Enhanced Communication and Collaboration:** By facilitating clear communication between stakeholders, the process helps align expectations and reduces misunderstandings. This fosters better collaboration and ensures that all parties are aware of changes and their implications.
- **Risk Mitigation and Control:** The Change Order process identifies potential risks early, allowing for proactive management of scope, cost, and timelines. It encourages timely closure of Change Orders, maintaining project momentum and minimizing disruptions.
- **Approval and Execution:**
 - Once approved, the relevant party acts based on the change.
 - Ideally, the Change Order should be closed within 5 days after initiating the approval process.

The Change Order process involves **two distinct workflows**, each serving different purposes depending on who initiates the change.

Partner Owner Change Order	SC Owner Change Order
Initiator: External Partner User	Initiator: Internal SC Employee
Change Type: Change Request	Change Type: Change Notice Change Type: Backcharge
Trigger Events: <ul style="list-style-type: none">▪ Identifying out-of-scope work▪ Recognizing the need for additional resources	Trigger Events: <ul style="list-style-type: none">▪ Changes in project scope▪ Variations in existing scope▪ Identification of potential back charges

Note: The term **“Contractor”** in the workflow steps represents **“Partner Users”** and includes user groups such as **“Partner Contractors”** and **“Partner Engineers.”**

1.2 User Groups & Permissions



1.2.1 WF: SC Owner Initiation (Notice, Backcharge)

Role	Permissions	Shell Level
All Project Users (Initiator)	Authorized to create, edit, act on record, and receive task notifications.	Project Level Shell
Partner Users	Authorized to minimally edit, act on record, and receive task notifications. Not authorized to add comments.	Project Level Shell
Project Engineers, Project Managers, Construction Managers, Construction Team, T&PS Project Managers, Startup Manager	Authorized to minimally edit, act on record, and receive task notifications.	Project Level Shell
All Project Users (Reviewers & Coordinators)	Authorized to act on record and receive task notifications. Note: Due to software constraints, All Project Users will have permission to act as the Review & Coordination Step and add general comments; however, the Initiator should refer to the BU-specific Uses Guide for BU-specific instructions EPPM Training Homepage	Project Level Shell
All Project Users (Level 1 to Level 4 Approvers, Additional Approvers)	Authorized to act on the record and receive task notifications.	Project Level Shell
Project Controls – Cost (Implementers)	Authorized to minimally edit, act on record, and receive task notifications.	Project Level Shell
Project Controls – Schedule (Implementers)	Authorized to minimally edit, act on record, and receive task notifications.	Project Level Shell
Construction Team (Site Team)	Authorized to minimally edit and act on records and receive task notifications.	Project Level Shell

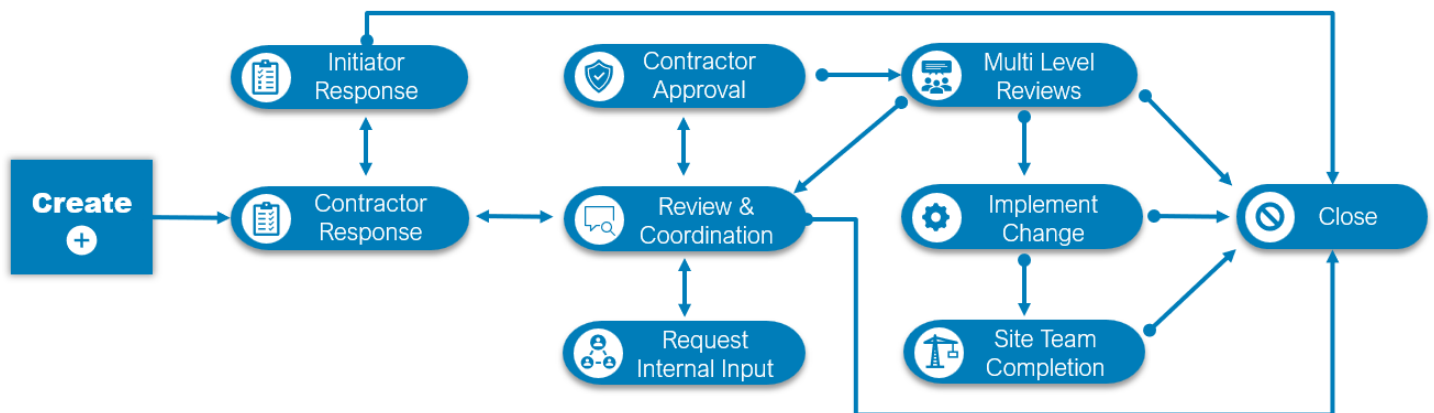
1.2.2 WF: Partner User Initiation (Request)

Role	Permissions	Shell Level
Partner Users (Initiator)	Authorized create, edit, act on record, and receive task notifications. Not authorized to add comments.	Project Level Shell
Track Leads, Construction Team, Project Engineers, Construction Managers (Responsible Lead)	Authorized minimal editing, acted on record, and received task notifications.	Project Level Shell
All Project Users (Coordinator)	Authorized minimal editing, act on record, and received task notifications.	Project Level Shell
All Project Users (Reviewers)	Authorized act on record and receive task notifications.	Project Level Shell
Project Controls – Cost (Implementers)	Authorized minimal editing, acting on record, and receiving task notifications.	Project Level Shell
Project Controls – Schedule (Implementers)	Authorized minimal editing, act on record, and received task notifications.	Project Level Shell
Construction Team (Site team)	Can minimally edit and act on records. Receives notification of task.	Project Level Shell

1.3 Business Process Flow



1.3.1 WF: SC owner initiation (Change Notice, Backcharge)

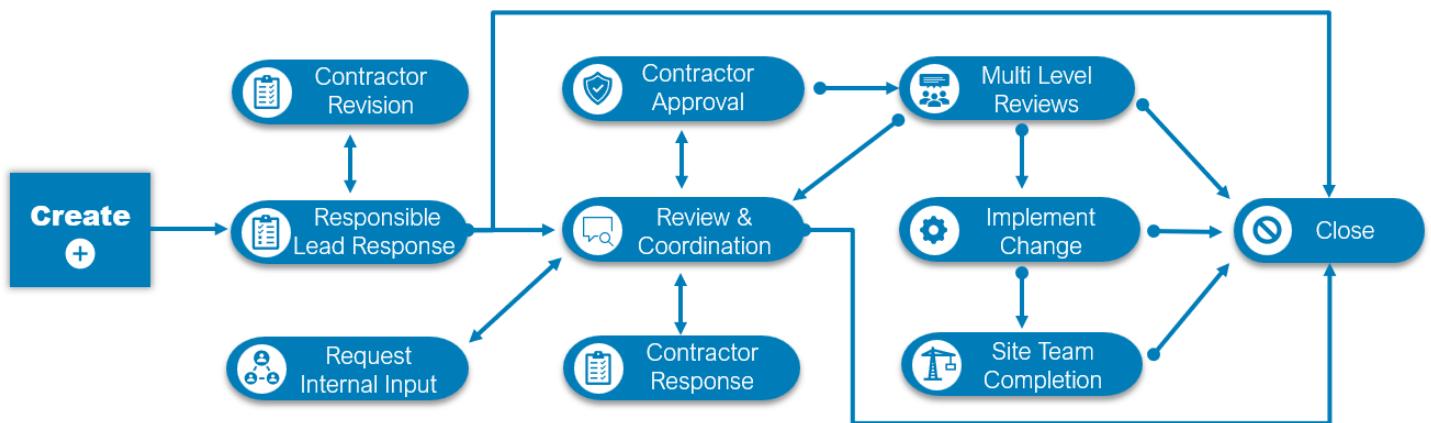


Workflow Step	Summary
Create	The initiator (an Internal Southern Company employee) creates the Change Order form with as much information as possible about the identified change. Workflow actions include creating a new change order record and filling out relevant details.
Contractor Response	The Partner User will review the form and ask for clarifications from any initiator. Workflow actions involve updating the response to Backcharge or developing an estimate for Change Notice
Initiator Response	The initiator reviews the comments provided by Partner User or provides clarification requested by contractor. Workflow actions include either returning the change order for modifications or canceling it.
Review & Co-ordination	This step involves collaboration among various stakeholders. Workflow actions include Request Partner User Approval, Request Partner User Input, Request Internal Input, Reject/Cancel the change order if necessary.
Partner User Approval	The Partner User reviews the change order and determines that the form needs revision or approves the change order (which may involve multi-level reviews).
Level 1 Review	This step involves reassigning the change order if needed, providing approval, updating change impacts, Implementing the change, Rejecting, or Canceling the Change Order
Level 2 Review	This step involves reassigning the change order if needed, providing approval, updating change impacts, Implementing the change, Rejecting, or canceling the change order
Level 3 Review	This step involves reassigning the change order if needed, providing approval, updating change impacts, Implementing the change, Rejecting, or canceling the change order
Level 4 Review	This step involves reassigning the change order if needed, providing approval, updating change impacts, Implementing the change, Rejecting, or canceling the change order, checking if additional review is required



Additional review	Additional review is like the previous levels, this step involves further review and approval. Workflow actions are consistent with the other review levels.
Implement change	Workflow actions included in this step are reassigning tasks as needed, Completing the change order and Site Team updates are made (applicable for TSS only). Implementer will review and determine whether the form needs to be reassigned or approved. After all necessary approvals, the change order is implemented.
Site Team Completion	Note: This step is applicable to TSS only In this stage the Site Team finalizes the change order process. Workflow actions include reassigning any remaining tasks and marking the change order as complete.

1.3.2 WF: Contractor Initiation (Request)



Workflow Step	Summary
Create	The initiator (Partner Contractor) creates the Change Order form with as much information as possible about the identified change. Workflow actions include creating a new change order record, filling out relevant details.
Responsible Lead Response	The Responsible Lead will review the form and ask for any clarifications from the initiator. Workflow actions involve clarifying, submitting for review, or cancelling the request.
Contractor Revision	The initiator (Partner Contractor) reviews the comments provided by the Responsible Lead or provides clarification requested by the Responsible Lead. Workflow actions include either returning the change order for modifications or canceling it.
Review & Co-ordination	This step involves collaboration among various stakeholders. Workflow actions include Request Contractor Approval, Request Contractor Input, Request Internal Input, Reject/Cancel the change order if necessary.
Partner User Approval	The partner user will review the form and either approve or reject the form.

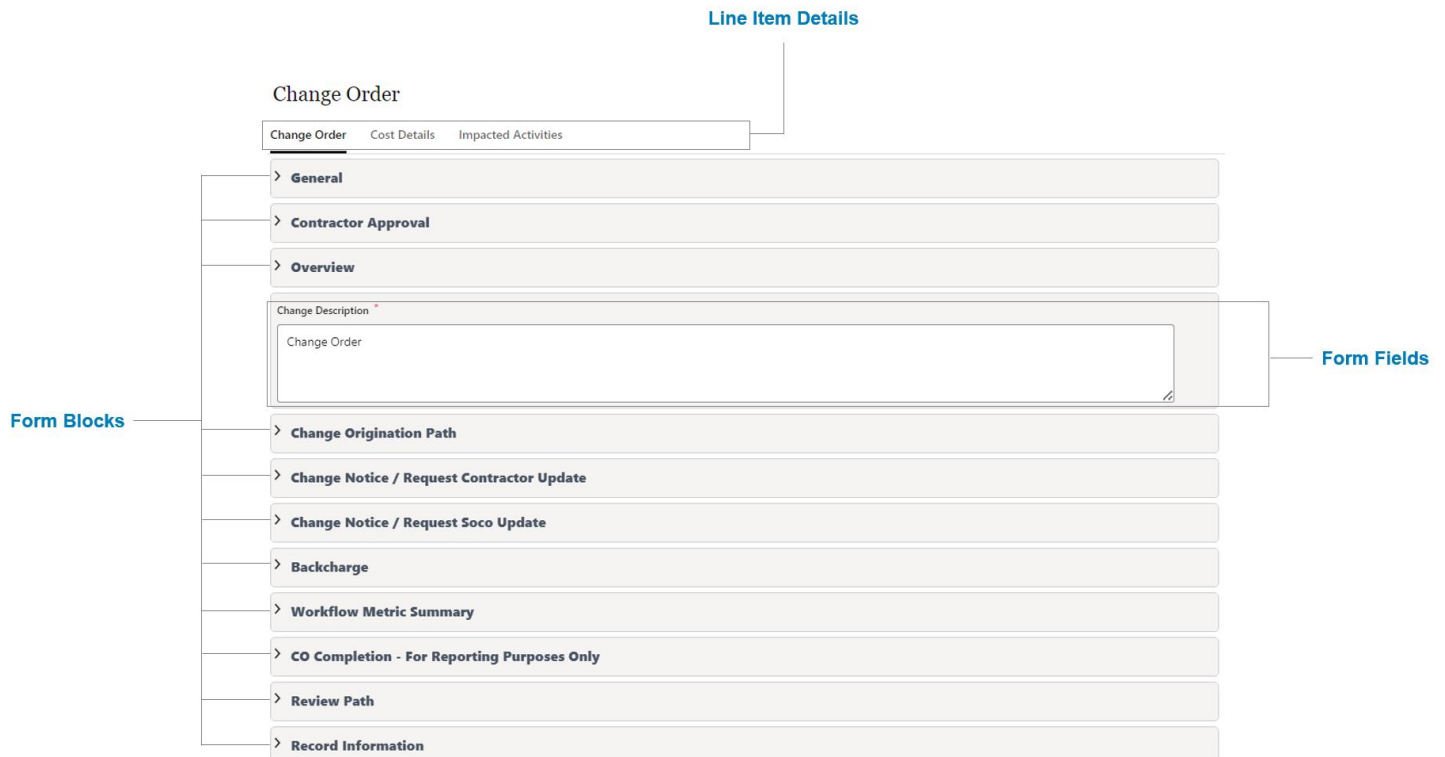


Level 1 Review	This step involves reassigning the change order if needed, providing approval, updating change impacts, implementing the change, rejecting, or canceling the change order
Level 2 Review	This step involves reassigning the change order if needed, providing approval, updating change impacts, implementing the change, rejecting, or canceling the change order
Level 3 Review	This step involves reassigning the change order if needed, providing approval, updating change impacts, implementing the change, rejecting, or canceling the change order
Level 4 Review	This step involves reassigning the change order if needed, providing approval, updating change impacts, implementing the change, rejecting, or canceling the change order and checking if additional review is required
Additional review	Additional review is like the previous levels, this step involves further review and approval. Workflow actions are consistent with the other review levels.
Implement change	Workflow actions included in this step are reassigning tasks as needed, Completing the change order and Site Team updates are made (applicable for TSS only). Implementer will review and determine whether the form needs to be reassigned or approved. After all necessary approvals, the change order is implemented.
Site Team Completion	Note: This step is applicable to TSS only In this stage the Site Team finalizes the change order process. Workflow actions include reassigning any remaining tasks and marking the change order as complete.



1.4 Change Order Form Explained

This form is divided into several blocks, containing mandatory and optional fields, as well as line items. Understanding these elements is crucial for accurately completing the form.



1.4.1 Form Blocks

The upper part of the form is divided into several blocks, each consisting of rows of input fields. These blocks are designed to organize the information efficiently.

Change Order (Upper Form): It is designed to capture and manage various aspects of a change order process. It includes blocks for documenting contractor approvals, change origination paths, contractor updates, SoCo updates, Backcharge, workflow metrics, and cost details. Each block ensures that relevant information is thoroughly recorded, reviewed, and approved, facilitating clear communication and effective management of changes. This comprehensive structure helps maintain accountability and transparency throughout the change order process.

- **General:** This block captures essential metadata for the business process, including basic information like the record ID, title, status, and key dates. It helps in identifying and tracking the form through its lifecycle.
- **Contractor Approval:** It ensures that all contractor-related actions and acknowledgments are reviewed and authorized. It maintains accountability by requiring approvals for both the release and acknowledgment stages, ensuring that all necessary parties have reviewed and accepted the contractor's involvement in the change order process.
- **Overview:** It provides a detailed summary of the change order, including key information such as the type of change, associated purchase order, contractor details, impacted departments, and the root cause. This block ensures that all critical aspects of the change order are clearly documented and easily accessible for review and approval.
- **Change Origination Path:** The Change Origination Path block allows users to select records from various categories to document the origin of a change. This block includes options for Request



for Information, Non-Conformance Report, Design Change Notice, Issues, Project Change Request, Correspondence, and Risks. By providing these options, the block ensures that all potential sources of change are accounted for and properly documented, facilitating a comprehensive and organized change management process.

- **Change Notice / Request Contractor Update:** The Change Notice / Request Contractor Update block is designed to capture and document the contractor's updates regarding the change notice or request. This block includes fields for recording the cost and schedule impacts, both estimated and actual, and the contractor's response. By providing these details, the block ensures that all potential impacts of the change are thoroughly accessed and communicated, facilitating informed decision-making and effective change management.
- **Change Notice / Request Soco Update:** The Change Notice / Request Soco Update block is designed to capture comprehensive updates from the contractor regarding the change notice or request. This block includes fields for documenting cost and schedule impacts, both estimated and final, and the contractor's response. It also tracks the completion of SoCo's cost and schedule reviews, references relevant documents, and includes notes on cost and schedule impacts along with comments for the contractor. This ensures a thorough assessment and clear communication of all aspects related to the change, facilitating effective management and decision-making.
- **Backcharge:** The Backcharge block is designed to document and manage financial adjustments related to contractor performance. It includes fields for estimating and recording the actual backcharge amount, tracking the payment received date, capturing the contractor's response to the backcharge, and issuing the final backcharge notice. This block ensures that all financial aspects of back charges are thoroughly documented and communicated, facilitating clear and accountable financial management.
- **Workflow Metric Summary:** The Workflow Metric Summary block is designed to provide a concise overview of the workflow's progress and completion. It includes fields for documenting the last action taken, who performed it, and when it was done. Additionally, it records who closed the workflow and the date it was closed. This block ensures that all key actions and their responsible parties are clearly tracked, facilitating transparency and accountability in the workflow process.
- **CO Completion – For Reporting Purposes Only:** The CO Completion - For Reporting Purposes Only block is designed to capture detailed information for reporting purposes upon the completion of a change order. It includes fields for documenting the rework impact and cost, retention withheld, actual cost, and the impact on contractual milestones and calendar days. Additionally, it captures any special notes or considerations. This block ensures that all relevant metrics and impacts are thoroughly recorded, facilitating accurate and comprehensive reporting.
- **Review Path:** The Review Path block is designed to outline the review process for a change order. It includes fields for selecting the review coordinator, determining if the reviewer can update the document, and specifying the review level required. The levels range from Level 1 to Level 4, with an option for additional levels if needed. This block ensures that the review process is clearly defined and managed, facilitating thorough and structured evaluations.
- **Record Information:** This block provides additional organizational and project-specific information, linking the project to its broader organizational context. It includes details about the organization, business unit, and program, facilitating better alignment and tracking within the organization.

1.4.2 Form Fields

The fields in these blocks behave according to their data elements:

- **Editable Fields:** These can be filled in or modified by the user.
- **Read-Only Fields:** These are automatically filled and cannot be changed by the user.
- **Record Number:** Automatically generated by the system.
- **Title:** A required input that must be provided by the user.

While optional fields are present in the form, this guide focuses on the mandatory fields required for form creation. Optional fields may include additional details like secondary objectives, detailed cost breakdowns,



and stakeholder information, which can be filled in based on organizational needs (Reference [BU Portal](#) relevant to your organization).

1.4.3 Line Item Details

A line item is a detailed entry within a business process (BP) form, such as transactions or documents, which can be individually edited or deleted if the form is still editable.

- **Cost Details (Line Item):** The Cost Details line item provides a comprehensive overview of the financial aspects related to a change order. It includes details about purchase order impacts, such as item quantities, prices, and task references. It also captures the contractor's estimated impacts on costs and schedules, including item quantities and total estimates. The final terms section records the finalized impacts on costs and schedules, with detailed items and cost information. Additionally, the code name validation ensures the accuracy of code names used in the process. This structure ensures that all cost-related details are clearly documented and validated for accurate financial management.
- **Impacted Activities (Line Item):** The Impacted Activities line item provides detailed information about activities affected by the change order. It includes the P6 Activity Details block, which captures the specific P6 activity, its name, planned start and finish dates, and any relevant comments. This ensures that all impacted activities are clearly documented, facilitating effective tracking and management of changes within the project schedule.

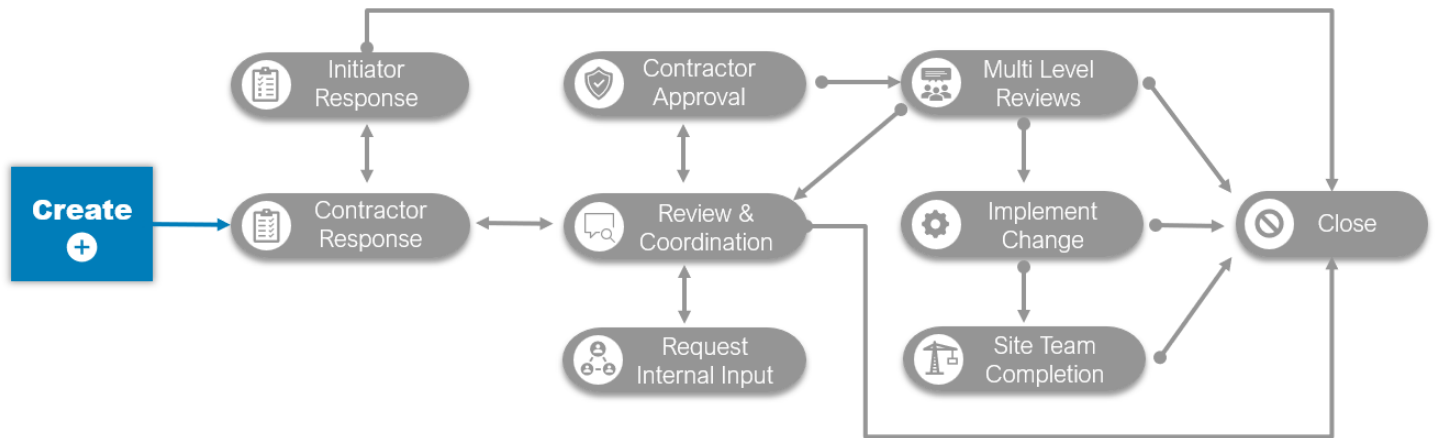
2. Step-by-Step Instructions

Workflow Option(s)	
WF 1: SC owner initiation (Change Notice, Backcharge)	WF 2: Contractor owner initiation (Change Request)
This workflow is initiated by SC for Change Type- Change Notice & Backcharge	This workflow is initiated by Partner Users for Change Type- Change Request
Jump to Section	Jump to Section

SC Owner Initiation (Change Notice, Backcharge)

2.1 Create Change Notice/ Backcharge Record

User Role(s): All Project Users



1. In the left Navigator, click **Change Management > Change Order**
2. Click **+ Create**

3. In the **General** section of the **Create New Change Order** window, populate below mentioned fields:

Title	Use a clear and concise title that summarizes the content or purpose of the Change Notice or Backcharge record. Character Limit – 50 words
Due Date	Select the due date from the provided calendar icon. The due date is the entire workflow completion date.

4. Navigate to the **Overview** Section and select **Change Type & Purchase Order** details.

Change Type	Select either Change Notice or Backcharge from the given drop-down menu.
--------------------	--



	Note: In case SC Owner selects Change Type = Change Request, an error message will be displayed when attempting to send the record.
Oracle PO #	In PO field, click the text box ('Start typing for suggestions...') and type the purchase order name or number to select PO details. The PO details can be searched using the Select function

Overview

Change Type *

Select

Required

Contractor Representative

Oracle PO # *

Type a Oracle PO #...

Required

Contractor / Vendor

- a. **Change Description:** Enter text to describe the change details in 4000 or less characters.

Change Description *

Required

5. Navigate to **Review Path** Section and select **Review Coordinator** from the given selection menu.

Note: Refer to *BU-specific User Guide* for BU-specific instructions on who to select for this role [EPPM Training Homepage](#)

Review Coordinator	In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Review Co-Ordinator. The name can be searched using the Select function
---------------------------	--

Review Path

Review Coordinator *

Type a Name...

Required

6. Navigate to **Cost Details** Tab > click **Add**.



Change Order **Cost Details** Impacted Activities

Add Actions

No.		...	Change Type	PO Impact	PO Line-Item	PO Line-Item Qty

Cost Code

In this field, 'Start typing CBS code or name for suggestions and select the CBS code or select the CBS Code by clicking on selection icon

Line Item Details Attachments Linked Records

Cost Code *

Type CBS Code or Name...

Required

Code Name

Override Validation

In this field, Select either **Yes** or **No** from the given drop-down menu.

Note: Override Validation refers to the ability to bypass or modify predefined validation rules for cost entries. It is used to bypass deviations from the Cost Code Selected in Change Order and the PO Line Item

- **Yes:** Select this option to allow a different cost code than the associated PO line item
- **No:** Selecting this option will not allow to select different cost code than the associated PO line item

Line Item Details Attachments Linked Records

Change Type

Override Validation?

Select

a. Populate all the mandatory & optional details in Line Item Details.

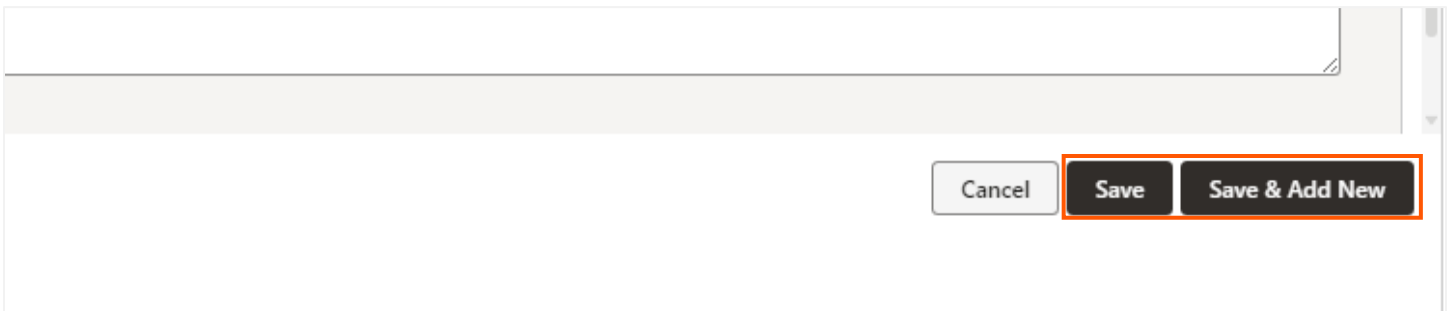
7. Click **Save** or **Save & Add New**.

Save

Select this Option when only one line item to be added.


Save & Add New

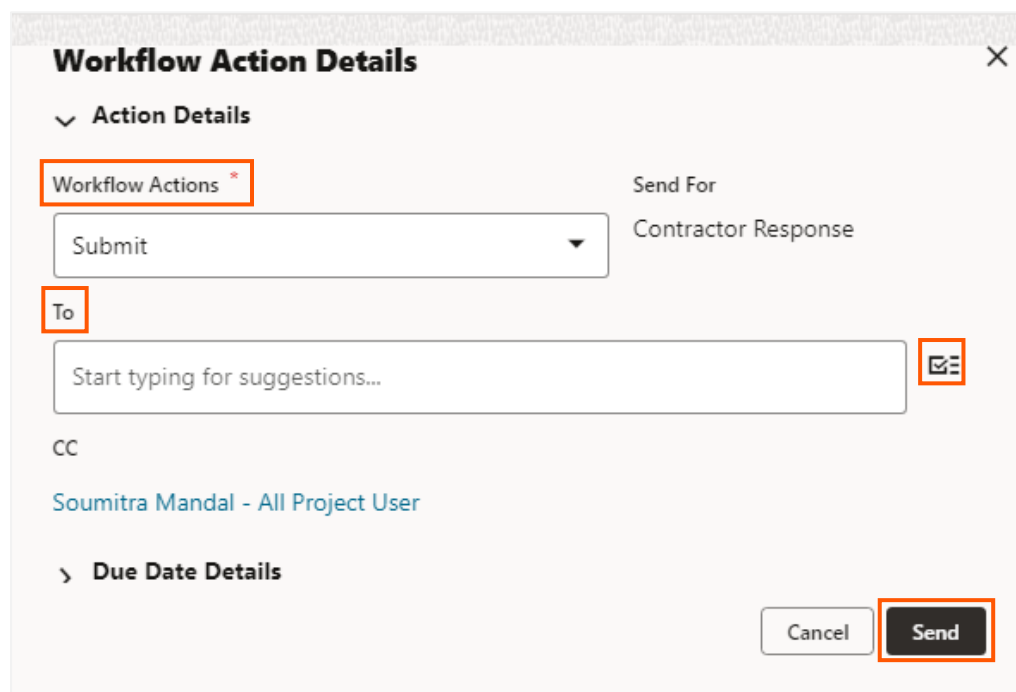
Select this option when more than one line item to be added. Repeat step no 6 to add the cost details.



8. Click **Send** from the top right side of the screen.



- Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select **Submit**.
- To:** In this field, 'Start typing name of the Partner User for suggestions or select Partner Username from selection icon  .
- CC:** Initiator is auto populated.
- Click **Send**.



2.2 Contractor Response to Change Notice or Backcharge

User Role(s): Partner Users (Partner Contractors & Partner Engineers)



1. In the left Navigator, click the **Tasks** option in the **Navigator**.
 - a. The Task Log will show available records.
 - b. Double-click the **Change Order** record to be Reviewed.

(**Note:** Partner User will also receive an email with a link of the record to click on)

Tasks

+ Create Actions View: Received in last 7 days [Edit] [Refresh] [Print] [Search] [Filter]

✓	📄	Origin	Business Process	Record Number	Title	Record Due
<input checked="" type="checkbox"/>		Project_Demo_TSS	Change Order	CO-00051	test16sept	09/18/2024 05:00 ...
<input checked="" type="checkbox"/>		Project_Demo_TSS	Change Order	CO-00049	Change Order 001	09/19/2024 05:00 ...
<input checked="" type="checkbox"/>		Project_Demo_TSS	Submittals	SUB-000032	ABC-3	09/24/2024 10:45 ...

2. A new window will appear, click **Accept** on the top right side of the page.

Change Order Decline More Actions **Accept**

Change Order Cost Details Impacted Activities

Task Details

From

Attachments Linked Records [Next] [Full Screen]

3. Follow the steps in the section below according to the Change Type of the Change Order.

Change Type = Change Notice	Change Type = Backcharge
Jump to Section	Jump to Section

2.2.1 Change Type = Change Notice

1. Navigate to the Change Notice/ Request Contractor Update Section and populate the below fields.

Cost Impact	Select Yes if the Change Notice has any financial implication or select No .
Schedule Impact	Select Yes if the Change Notice has any timeline implication or select No .
Contractor Response	Enter text describing the response in 4000 or less characters.



▼ **Change Notice / Request Contractor Update**

Cost Impact * **Schedule Impact ***

Select Select

Required Required

Estimated Cost Impact Estimated Calendar Days Impact

\$0.00 0

Contractor Response *

Required

2. If **Cost Impact** or **Schedule Impact** =YES, then the Partner User shall follow the steps below.

▼ **Change Notice / Request Contractor Update**

Cost Impact * **Schedule Impact ***

Yes Yes

- a. Click on **Cost Details** Tab and click on the line item already created by the Company User during the Create Step.

Change Order		Cost Details		Impacted Activities	
		Add	Actions ▼	View Currency	Transaction Currency ▼
No. ▼		Change Type	PO Impact	PO Line-Item	
001		Change Notice		0	

- b. Navigate to **Contractor Estimate** block and update the details. (**Note:** Complete all the available fields as applicable to define the cost or schedule impacts related to the Change Notice)



Change Order

Save Draft More Actions Send

Change Order Cost Details Impacted Activities

Add Actions View Currency Transaction Currency

Line Item Details Attachments Linked Records

Contractor Estimate

Estimate Calendar Days Impact

0

Terms of Cost

Select

Item Quantity

0

Unit of Measure

each

Item Unit Cost

\$0.00

c. Click **Save**.

Code Name Last Step

Item 1

Cancel Save Save & Add New

3. Click **Send**.

Save Draft More Actions Send

Attachments Linked Records Linked Mail Workflow Progress Auc > []

0

4. **Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select **Submit for Review** or **Clarify**

Clarify

- If clarification is needed from the CO initiator, then follow the steps from [2.2.1.1 Clarify](#)

Submit for Review

- Select this option to send a record for review. Follow the steps from [2.2.1.2 Submit for Review](#)

2.2.1.1 Clarify

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.



Workflow Actions	Select Clarify from the drop down menu.
To	The field will be auto populated with CO Initiator name.
CC	Select users in the CC field from whom the internal input is required. The names of the desired additional users should be added to the CC field using the select icon

Workflow Action Details

✓ **Action Details**

Workflow Actions *
Clarify

Send For
Initiator Response

To
Soumitra Mandal - All Project User

CC
Start typing for suggestions...

✓ **Due Date Details**


Task Due Date
Task Due Date is not available

Cancel Send

2. Click **Send**.

2.2.1.2 Submit for Review

- Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Submit for Review from the drop down menu.
To	Field will be auto populated with Review Coordinator name selected by the CO Initiator in step number 2.1 > 5 in this user guide.
CC	Field will be populated with CO Initiator. Additionally, select users in the CC field from whom internal input is required. The names of the desired additional users should be added to the CC field using the select icon 



Workflow Action Details

Workflow Actions *

Submit for Review

Send For
Review & Coordination

To

Company Administrator

CC

Soumitra Mandal - All Project User

Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

2. Click **Send**.

2.2.2 Change Type = Backcharge

1. Navigate to the **Backcharge** section and populate the below fields.
 - a. **Contractor Response to BCA:** Enter text describing the response in 4000 or fewer characters.

Backcharge

Estimated Backcharge Amount

\$0.00

Actual BCA Cost

\$0.00

Contractor Response to BCA *

Required

BCA Payment Received Date

Final BCA Notice

2. Click **Send**.



mpact

0

Attachments

Linked Records

Linked Mail

Workflow Progress

Auc

>

⌵

Save Draft

More Actions ▾

Send

3. **Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select **Submit for Review** or **Clarify**

Clarify	Submit for Review
<ul style="list-style-type: none">If clarification is needed from the CO initiator, then follow the steps from 2.2.2.1 Clarify	<ul style="list-style-type: none">Select this option to send a record for review. Follow the steps from 2.2.2.2 Submit for Review

2.2.2.1 Clarify

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Clarify from the drop down menu.
To	The field will be auto populated with CO Initiator name.
CC	Select users in the CC field from whom the internal input is required. The names of the desired additional users should be added to the CC field using the select icon



Workflow Action Details ✕

▼ **Action Details**

Workflow Actions ^{*}

Clarify ▼

Send For Initiator Response

To
Soumitra Mandal - All Project User

CC

Start typing for suggestions...

☑

▼ **Due Date Details**

Task Due Date

i

Task Due Date is not available


Cancel

Send

2. Click **Send**.

2.2.2.2 Submit for Review

3. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Submit for Review from the drop-down menu.
To	Field will be auto populated with Review Coordinator name selected by the CO Initiator in step number 2.1 > 5 in this user guide.
CC	Field will be populated with CO Initiator. Additionally, select users in the CC field from whom internal input is required. The names of the desired additional users should be added to the CC field using the select icon 



Workflow Action Details ✕

▼ **Action Details**

Workflow Actions *

Submit for Review ▼

Send For
Review & Coordination

To

Company Administrator

CC

Soumitra Mandal - All Project User ✕

▼ **Due Date Details**

Task Due Date

i

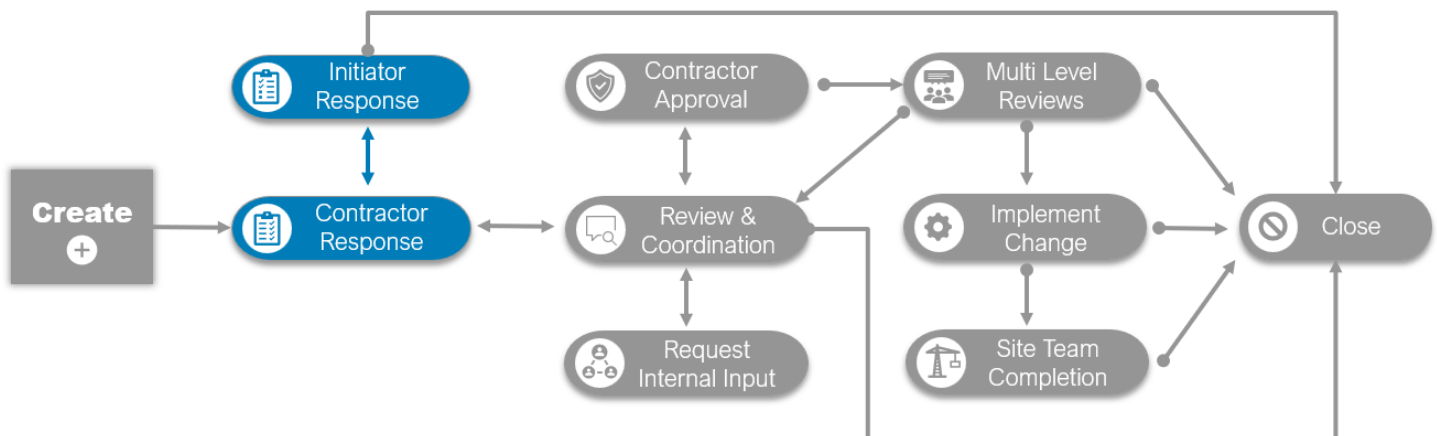
Task Due Date is not available

Cancel **Send**

4. Click **Send**.

2.3 Initiators Response to Request for Clarification from Partner User

User Role(s): All Project Users



1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task Log** will show available records.
 - b. Double-click the **Change Order** record to be responded.



(Note: Initiator will also receive an email with a link of the record to click on)

Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

Create

Actions

View: All Tasks

	Origin	Business Process	Record Number	Title	Record Due	From	Sent for
	Project_Demo_TSS	Change Order	CO-00051	test16sept	09/18/2024 05:00 ...	Hariharanath Mag...	Initiator Response
	Project_Demo_TSS	Risks	RISK-000023	test	10/04/2024 05:16 ...	Soumitra Mandal - ...	Revise
	Project_Demo_TSS	Risks	RISK-000022	t6est	10/04/2024 05:08 ...	Soumitra Mandal - ...	Review/Mitigate
	Project_Demo_TSS	Action Items	AI-000042	test		Soumitra Mandal - ...	Action



2. **Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select **Return** or **Cancel**.

- a. **Return:** Select this option when all the requested information is complete, and the record is ready to be sent back to the Partner User.



Workflow Action Details

✓ **Action Details**

Workflow Actions * Send For

Return Contractor Response

To

Start typing for suggestions...

CC

Soumitra Mandal - All Project User

✓ **Due Date Details**

Task Due Date

Task Due Date is not available

Cancel **Send**

- b. **To:** In this field, 'Start typing name of the contractor for suggestions or select the contractor's name from selection icon .
- c. **Cancel:** Select this option when Change Order Record needs to be cancelled.
- d. Click **Send**.

2.3.2 Change Type = Backcharge

1. Click **Send**.

Save Draft More Actions **Send**

Attachments Linked Records Linked Mail Workflow Prog >

2. **Workflow Actions Details** Window will open. In **Action Details** > **Workflow Actions** select **Return** or **Cancel**.



Workflow Action Details

✓ Action Details

Workflow Actions *

Select

Select

Return

Cancel

Send For

Cancel Send

- a. **Return:** Select this option when all the requested information is complete and the record is ready to be sent back to the Partner User.

Workflow Action Details

✓ Action Details

Workflow Actions *

Return

Send For

Contractor Response

To

Start typing for suggestions...

CC


Soumitra Mandal - All Project User

✓ Due Date Details

Task Due Date

Task Due Date is not available

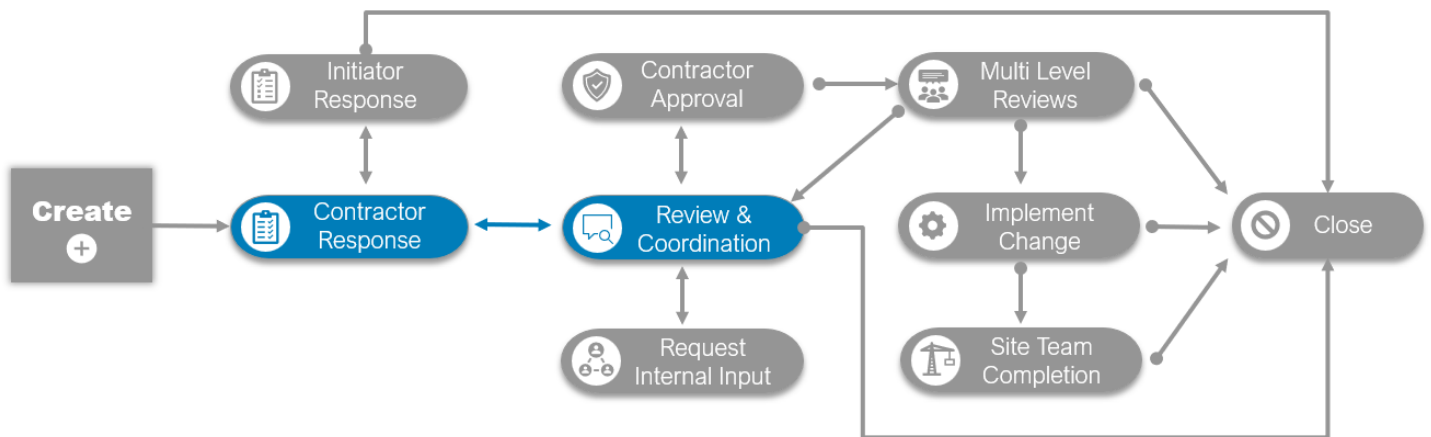
Cancel Send

- b. **To:** In this field, 'Start typing name of the contractor for suggestions or select the contractor's name from selection icon  .
- c. **Cancel:** Select this option when Change Order Record needs to be cancelled.
- d. Click **Send**.



2.4 Review & Coordination of Change Notice or Backcharge

User Role(s): All Project Users (the Review Coordinator first selected by the CO Initiator)



1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task Log** will show available records.
 - b. Double-click the **Change Order** record to be responded.**(Note:** Partner User will also receive an email with a link of the record to click on)

☰ Tasks

🔔 Notifications

📄 Drafts

🔑 Shell Access Req...

Tasks

+

Create

Actions

▼

View: All Tasks

▼

✎

↺

🖨

▼

🔍

☰

✔️🔒	Origin	Business Process	Record Number	Title	Record Due	From	Sent for
✔️	Project_Demo_TSS	Change Order	CO-00055	test_...	09/20/2024 07:00 PM	Hariharanath Maganti- Partner C...	Review & Coordination
✔️	Project_Demo_TSS	Change Order	CO-00050	123	09/30/2024 07:00 PM	Company Administrator, SoCo	Review & Coordination

2. Click **Accept** on the top right side of the screen.

Decline

More Actions

Accept

Attachments

Linked Records

Linked Mail

Workflow Prog

>

3. Follow the steps in the section below according to the Change Type of the Change Order.

Change Type = Change Notice	Change Type = Backcharge
Jump to Section	Jump to Section

2.4.1 Change Type = Change Notice

1. Review the response received from Contractor and CO Notice form.



2. Navigate to Change Notice / Request SoCo update and populate the below details.

- SoCo Cost Review Completed?** Select Yes if cost review is completed. Select No if cost review is not completed.
- SoCo Schedule Review Completed?** Select Yes if schedule review is completed. Select No if schedule review is not completed.

Note: You can request additional Internal Input during the "Send" step by adding names to the CC Field.

Change Order

Cost Details

Impacted Activities

▼

Change Notice / Request Soco Update

SoCo Cost Review Completed? *

Select

▼

Required

Final Terms Cost Impact

\$0.00

SoCo Schedule Review Completed? *

Select

▼


Required

Final Terms Calendar Days Impact

0

3. If the Review Coordinator determines that additional approvals of the final CO will be required, then navigate to **Review Path** Section and select the below mentioned fields.

Note: You will invite Additional Internal Reviewers during the "Send" step by adding names to the CC Field.

- Allow Reviewer to Update?** Select either **Yes** or **No**
Note: this refers to the internal Approvers. Choosing Yes will allow the approvers to make changes to or reassign the record.
- Level of Review Required?** Select the level of review required from the given drop down menu.
Note: This refers to the level of internal Approval (not review) required to finalize the Change Order and may be based on Spend Authority or other procedures. Refer to BU-specific User Guides for further guidance on selecting the appropriate Level of Review" [EPPM Training Homepage](#)
- Level 1:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 1 reviewer. The name can be searched using the Select function 
- Level 2:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 2 reviewer. The name can be searched using the Select function.
- Level 3:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 3 reviewer. The name can be searched using the Select function.
- Level 4:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 4 reviewer. The name can be searched using the Select function.



- g. **Additional:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Additional reviewer. The name can be searched using the Select function.

Note: If Level of review required = Level 2 and Level 2 is empty, then the error message will pop up. Users are required to input names of the Level field up to selected levels. This is valid for all selected levels.

Review Path

Review Coordinator

Company Administrator

Allow Reviewer to Update? *

Yes

Level 1

Type a Name...

Level 3

Type a Name...

Additional

Type a Name...

Level of Review Required *

Level 4

Level 2

Type a Name...

Level 4

Type a Name...

4. Click **Send**

Save Draft More Actions Send

Attachments Linked Records Linked Mail Workflow Prog > []

[]

5. **Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select any one of the below mentioned options.

Request Contractor Input	Request Contractor Approval	Request Internal Input	Cancel
<ul style="list-style-type: none">If additional input is needed from the Partner User or to continue negotiations with the Partner User, then follow the steps from 2.4.1.1 Request Contractor Input	<ul style="list-style-type: none">Select this option after all necessary Internal Input has been received and Southern Company is ready for the Partner User to Approve the	<ul style="list-style-type: none">If record needs to be sent for the review, then follow the steps from 2.4.1.3 Request Internal Input	<ul style="list-style-type: none">If the record needs to be cancelled, then follow the steps from 2.4.1.4 Cancel



Change Notice or Backcharge. Note, this step comes before the Level 1 Internal Approval steps. Follow the steps from [2.4.1.2 Request Contractor Approval](#)

Workflow Action Details ✕

✓ **Action Details**

Workflow Actions *

Send For

Select

Select

Request Contractor Approval

Request Contractor Input

Request Internal Input

Cancel



2.4.1.1 Request Contractor Input

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Request Contractor Input from the drop down menu.
To	Select Partner Contractors in the To field from whom the internal input is required. The names of the desired Partner Contractors should be added to the To field using the select icon
CC	Field will be auto populated with CO initiator name

2.4.1.2 Request Contractor Approval

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.



Workflow Actions	Select Request Contractor Approval from the drop down menu.
To	Field will be auto populated with selected Partner Contractor name.
CC	Field will be populated with CO Initiator. Additionally, select users in the CC field from whom internal input is required. The names of the desired additional Internal Reviewers should be added to the CC field using the select icon

2.4.1.3 Request Internal Input

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Request Internal Input from the drop down menu.
To	Field will be auto populated with review coordinator name.
CC	Select users in the CC field from whom the internal input is required. The names of the desired additional Internal Reviewers should be added to the CC field using the select icon



Workflow Action Details

▼ Action Details

Workflow Actions *

Request Internal Input ▼

Send For
Review & Coordination

To
Company Administrator

CC

Soumitra Mandal - All Project User ×

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

2.4.1.4 Cancel

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Cancel from the drop down menu.
To	Field does not exist
CC	Select users in the CC field to be notified. The names of the desired additional users should be added to the CC field using the select icon



The dialog box is titled "Workflow Action Details" and has a close button (X) in the top right corner. Under the "Action Details" section, there is a "Workflow Actions" dropdown menu with "Cancel" selected. To the right of this dropdown is the text "Send For End". Below the dropdown is a "CC" field with a placeholder text "Start typing for suggestions...". To the right of the CC field is a small icon of a document with a checkmark. At the bottom right of the dialog are "Cancel" and "Send" buttons.

a. Click **Send**

Note: Users in CC can add comments

The form shows a "Comments" section with tabs for "Attachments", "Comments", "Linked Records", and "Links". The "Comments" tab is active. Below the tabs is a large text area for entering a comment. At the bottom of the text area are a "Clear" button and a "Post" button. To the left of the text area is a vertical scrollbar.

2.4.2 Change Type = Backcharge

1. Review the response received from Contractor and CO Notice form.
2. Navigate to Backcharge section and populate the below details.
 - a. **Final BCA Notice:** Add description with 4000 or fewer characters.

Note: You can request additional Internal Input during the "Send" step by adding names to the CC Field.



▼ **Backcharge**

Estimated Backcharge Amount


Actual BCA Cost

BCA Payment Received Date

Contractor Response to BCA

Final BCA Notice *

Required

3. If the Review Coordinator determines that additional approvals of the final CO will be required, then navigate to **Review Path** Section and select the below mentioned fields.
- Note:** You will invite Additional Internal Reviewers during the "Send" step by adding names to the CC Field.
- Allow Reviewer to Update?** Select either **Yes** or **No**
Note: this refers to the internal Approvers. Choosing Yes will allow the approvers to make changes to the record.
 - Level of Review Required?** Select the level of review required from the given drop down menu.
Note: This refers to the level of internal Approval (not review) required to finalize the Change Order and may be based on Spend Authority or other procedures. Refer to BU-specific User Guides for further guidance on selecting the appropriate Level of Review [EPPM Training Homepage](#)
 - Level 1:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 1 reviewer. The name can be searched using the Select function 
 - Level 2:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 1 reviewer. The name can be searched using the Select function.
 - Level 3:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 1 reviewer. The name can be searched using the Select function.
 - Level 4:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 1 reviewer. The name can be searched using the Select function.
 - Additional:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 1 reviewer. The name can be searched using the Select function.
- Note:** If Level of review required = Level 2 and Level 2 is empty, then the error message will pop up. Users are required to input names of the Level field up to selected levels. This is valid for all selected levels.



Review Path

Review Coordinator

Company Administrator

Allow Reviewer to Update? *

Yes

Level of Review Required *

Level 4

Level 1

Type a Name...

Level 2

Type a Name...

Level 3

Type a Name...

Level 4

Type a Name...

Additional

Type a Name...

4. Click **Send**

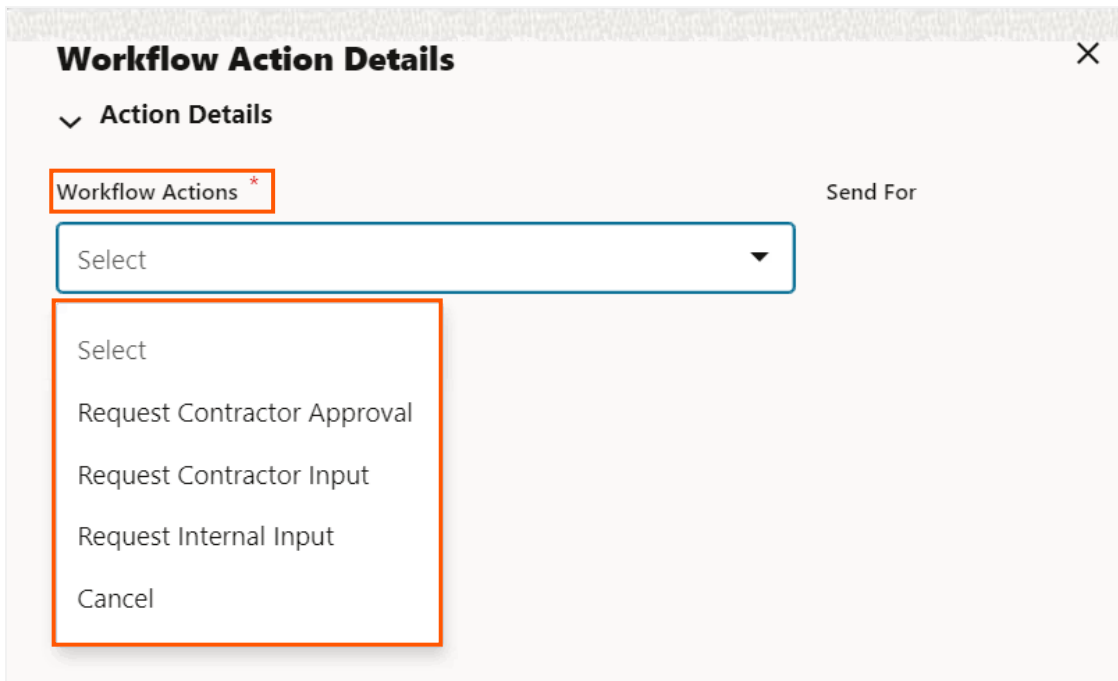
Save Draft More Actions **Send**

Attachments Linked Records Linked Mail Workflow Prog > []

[]

5. Workflow Actions Details Window will open. In **Action Details > Workflow Actions** select any one of the below mentioned options.

Request Contractor Input	Request Contractor Approval	Request Internal Input	Reject / Cancel
<ul style="list-style-type: none">If additional input is needed from the Partner User or to continue negotiations with the Partner User, then follow the steps from 2.4.2.1 Request Contractor Input	<ul style="list-style-type: none">Select this option after all necessary Internal Input has been received and Southern Company is ready for the Partner User to Approve the Change Notice or Backcharge. Note, this step comes before the Level 1 Internal Approval steps. Follow the steps from 2.4.2.2 Request Contractor Approval	<ul style="list-style-type: none">If record needs to be sent for the review, then follow the steps from 2.4.2.3 Request Internal Input	<ul style="list-style-type: none">If the record needs to be cancelled, then follow the steps from 2.4.2.4 Cancel



2.4.2.1 Request Contractor Input

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Request Contractor Input from the drop down menu.
To	Select Partner Contractors in the To field from whom the internal input is required. The names of the desired Partner Contractors should be added to the To field using the select icon
CC	Field will be auto populated with CO initiator name



Workflow Action Details

▼ Action Details

Workflow Actions *

Request Contractor Input

Send For Contractor Response

To

Start typing for suggestions...

CC

Soumitra Mandal - All Project User

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

2.4.2.2 Request Contractor Approval

- Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Request Contractor Approval from the drop down menu.
To	Field will be auto populated with selected Partner Contractor name.
CC	Field will be populated with CO Initiator. Additionally, select users in the CC field from whom internal input is required. The names of the desired additional Internal Reviewers should be added to the CC field using the select icon



Workflow Action Details

▼ Action Details

Workflow Actions *

Request Contractor Approval ▼

Send For
Contractor Approval

To

Hariharanath Maganti- Partner Contractor

CC

Soumitra Mandal - All Project User ×

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

2.4.2.3 Request Internal Input

- Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Request Internal Input from the drop down menu.
To	Field will be auto populated with review coordinator name.
CC	Select users in the CC field from whom the internal input is required. The names of the desired additional Internal Reviewers should be added to the CC field using the select icon



Workflow Action Details

▼ Action Details

Workflow Actions *

Request Internal Input ▼

Send For
Review & Coordination

To
Company Administrator

CC

Soumitra Mandal - All Project User ×

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

2.4.2.4 Cancel

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Cancel from the drop down menu.
To	Field does not exist
CC	Select users in the CC field to be notified. The names of the desired additional users should be added to the CC field using the select icon

Workflow Action Details

✓ Action Details

Workflow Actions *
Cancel

Send For
End

CC
Start typing for suggestions...

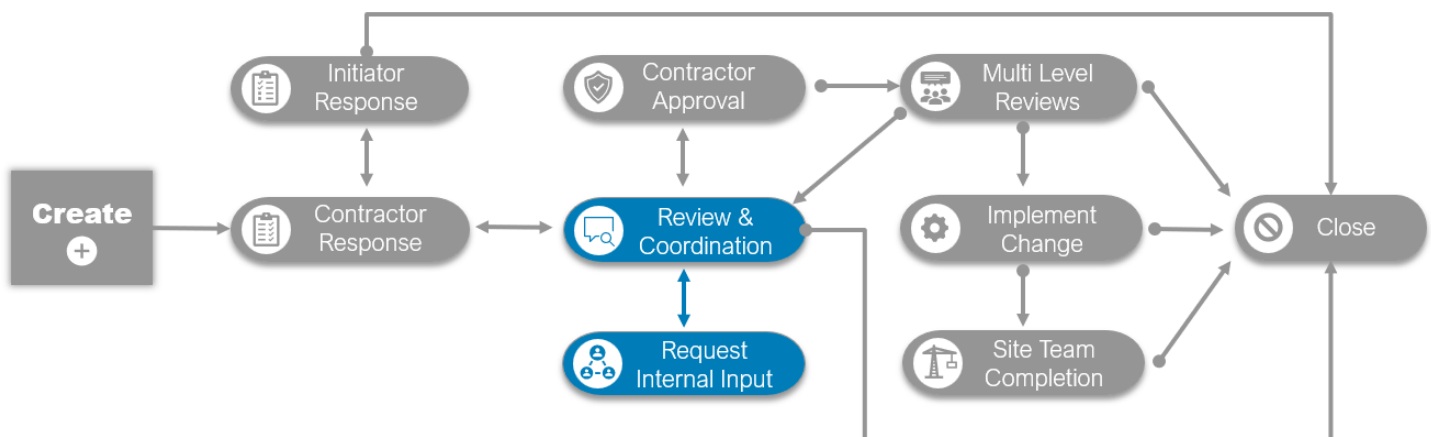
Cancel Send

2. Click **Send**

2.5 Provide Internal Input to Change Notice or Backcharge

User Role(s): All Project Users

Note: This step is for Users that have been requested to provide additional Internal Input regarding a company-initiated Change Notice or Backcharge.



1. In the left Navigator, click the **Notification** option in the Navigator
 - a. The **Notification** Log will show available records.
 - b. Double-click the **Change Order** record to be responded.
(**Note:** User will also receive an email with a link of the record to click on)



Notifications	Actions	View: All Notifications					
Drafts		Business Process	From	Title	Record Number	On	
Shell Access Request	Change Order	Rashmi Singh-Proj...	Notice-1	CO-00057	Pr		
	Change Order	Company Adminis...	123	CO-00050	Pr		

- Click on the **Comments** tab > Provide additional input requested by Review Coordinator in the Comments tab > Click **Post**.

Change Order Cost Details Impacted Activities

Attachments **Comments** Linked Records Linkec > []

Status
Potential
Priority
Originator

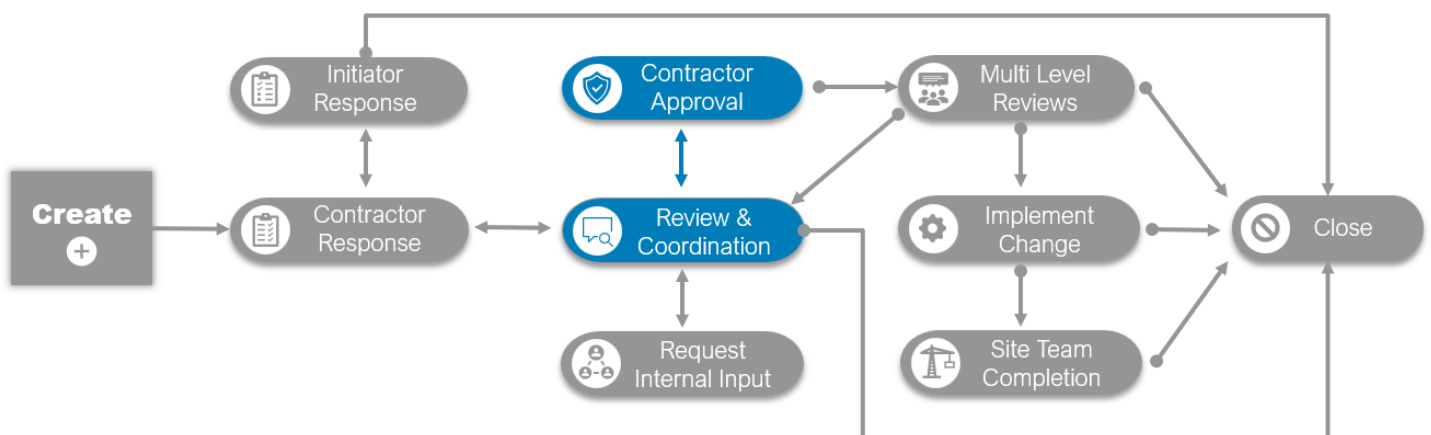
Clear

Post

- Close the record.

2.6 Contractor Approval of Change Order Notice or Backcharge

User Role(s): Partner User (Partner Contractors, Partner Engineers)



- In the left Navigator, click the **Tasks** option in the Navigator
 - The **Task Log** will show available records.



- b. Double-click the **Change Order** record to be responded.
(**Note:** Partner User will also receive an email with a link of the record to click on)

Tasks	Tasks								
Notifications	+ Create Actions View: (Modified) Received in last 7 days [Edit] [Refresh] [Print] [Search] [Filter]								
Drafts	<input checked="" type="checkbox"/>	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
Shell Access Request	<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00055	test_b...	09/20/2024 05:00 ...	Company Adminis...	Contractor Approval	
Document Manager	<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00056	test_c...	09/20/2024 05:00 ...	Soumitra Mandal -...	Contractor Response	
	<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00054	test987	09/19/2024 05:00 ...	Soumitra Mandal -...	Contractor Response	
	<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00052	test_s...	09/19/2024 05:00 ...	Soumitra Mandal -...	Contractor Response	

2. Click **Accept** on the top right side of the screen.

	Decline	More Actions ▼	Accept
	Attachments	Linked Records	Linked Mail
		Workflow Prog	> [Full Screen]

3. Follow the steps in the section below according to the Change Type of the Change Order.

Change Type = Change Notice	Change Type = Backcharge
Jump to Section	Jump to Section

2.6.1 Change Type = Change Notice

1. Navigate to the Contractor Approval Section and populate the below mentioned fields.
 - a. **Release Approval:** Read the release instructions and select **Approve** or **Reject** from the given drop down menu.
 - b. **Acknowledgement Approval:** Read the acknowledgement instructions and select **Approve** or **Reject** from the given drop down menu.



Contractor Approval

Release

Authorization of this Change Order constitutes a full and final settlement for all costs of Contractor (including, but not limited to, all direct, indirect, delay impact, and ripple effect costs of labor, subcontractors, materials, and

Acknowledgement

By selecting "Approve", I represent that I have the authority to approve this change order on behalf of Contractor

Release Approval *

Select

Required

Acknowledgement Approval *

Select

Required

2. Click Send

Save Draft

More Actions ▼

Send

08/02/2024 04:10 AM

Record Last Update Date

08/05/2024 03:24 AM

Attachments

Linked Records

Linked Mail

> []

a. Note:

- If **Release Approval & Acknowledgement Approval** are selected as **Approve**, then workflow will progress to Level 1 Review.
- If any of the **Release Approval & Acknowledgement Approval** are selected as **Reject**, then workflow will progress to **Review & Coordination**.

- b. **Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select **Submit**.

Note: For Condition 1 & condition 2, please do not modify the **"To"** and **CC** fields that have been pre-populated in the Workflow Action Details window.

Condition 1: Release Approval and Acknowledgement Approval = Approve



Workflow Action Details

▼ Action Details

Workflow Actions *

Submit ▼

Send For
Level 1 Review

To

CC

Soumitra Mandal - All Project User ×

✉

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

Condition 2: Release Approval or Acknowledgement Approval = Reject



Workflow Action Details

▼ Action Details

Workflow Actions *

Submit ▼

Send For
Review & Coordination

To

Company Administrator

CC

Soumitra Mandal - All Project User ×

✉

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

- c. Click **Send**.



Workflow Action Details

▼ Action Details

Workflow Actions *

Submit ▼

Send For

Level 1 Review

To

CC

Soumitra Mandal - All Project User ×

✉

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

2.6.2 Change Type = Backcharge

1. Navigate to the Contractor Approval Section and populate the below mentioned fields.
 - a. **Release Approval:** Read the release instructions and select **Approve** or **Reject** from the given drop down menu.
 - b. **Acknowledgement Approval:** Read the acknowledgement instructions and select **Approve** or **Reject** from the given drop down menu.



▼ **Contractor Approval**

Release

We (the vendor/contractor) request that SCS perform the work described herein and charge our account.

Acknowledgement

By selecting "Approve", I represent that I have the authority to approve this change order on behalf of Contractor

Release Approval *

Select

Required

Acknowledgement Approval *

Select

Required

2. Click **Send**

Save Draft

More Actions ▼

Send

08/02/2024 04:10 AM

Record Last Update Date

08/05/2024 03:24 AM

Attachments

Linked Records

Linked Mail

> []

a. **Note:**

- If **Release Approval & Acknowledgement Approval** are selected as **Approve**, then workflow will progress to Level 1 Review.
- If any of the **Release Approval & Acknowledgement Approval** are selected as **Reject**, then workflow will progress to **Review & Coordination**.

- Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select **Submit**.

Note: For Condition 1 & condition 2, please do not modify the **"To"** and **CC** fields that have been pre-populated in the Workflow Action Details window.

Condition 1: Release Approval and Acknowledgement Approval = Approve



Workflow Action Details ✕

✓ Action Details

Workflow Actions ^{*}

Submit ▼

Send For
Level 1 Review

To

CC

Soumitra Mandal - All Project User ✕

✎

✓ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

Condition 2: Release Approval or Acknowledgement Approval = Reject



Workflow Action Details

▼ Action Details

Workflow Actions *

Submit ▼

Send For
Review & Coordination

To

Company Administrator

CC

Soumitra Mandal - All Project User ×

☑

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

- Click **Send**.



Workflow Action Details

✓ Action Details

Workflow Actions *

Submit

Send For

Level 1 Review

To

CC

Soumitra Mandal - All Project User ×

✓ Due Date Details

Task Due Date

i

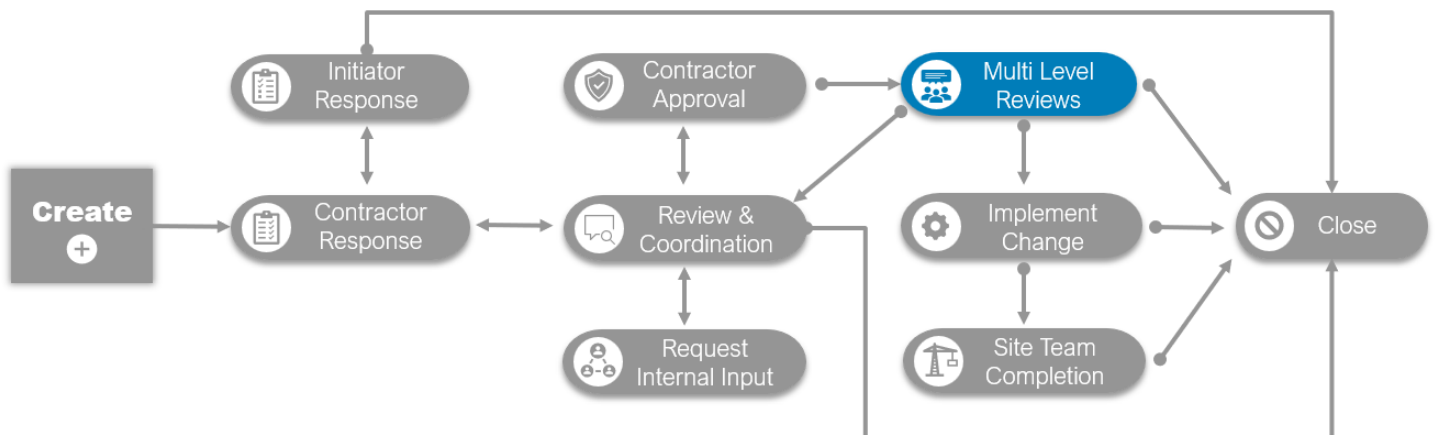
Task Due Date is not available

Cancel

Send

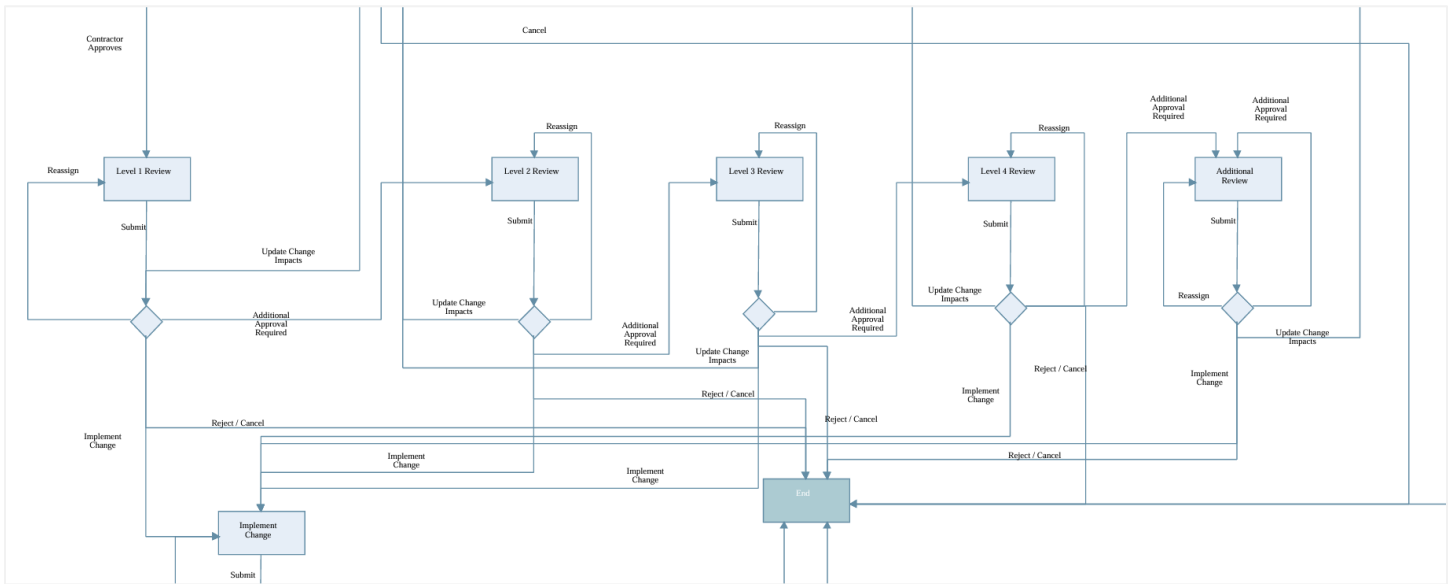
2.7 Multi Level Reviews of Change Notice or Backcharge

User Role(s): All Project Users (Level 1 to Level 4 and Additional Reviewers selected by Review Coordinators)



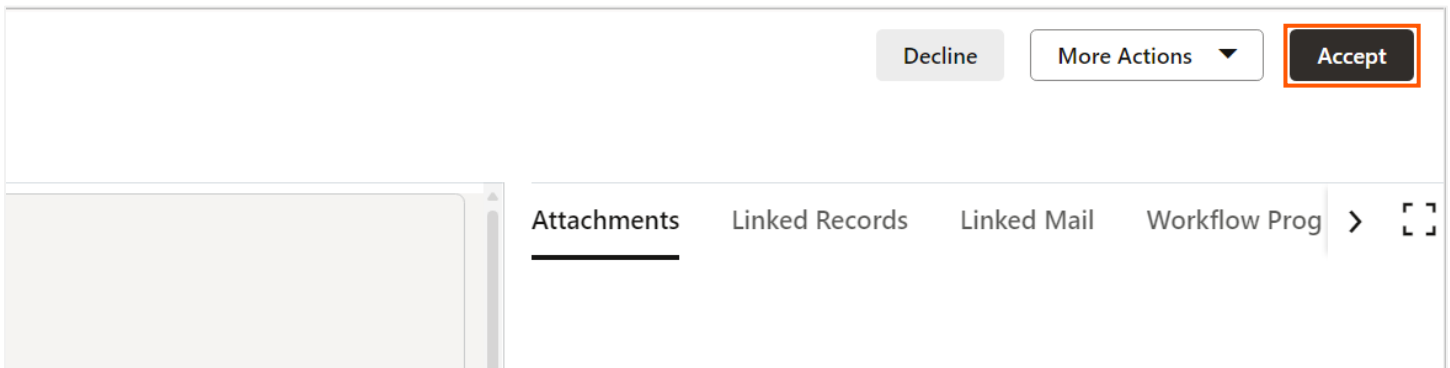


Multi-Level Reviews: This step includes multiple levels of review as selected in step 2.4 Review & Coordination of Change Notice or Backcharge.



1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task Log** will show available records.
 - b. Double-click the **Change Order** record to be responded.
(**Note:** Partner User will also receive an email with a link of the record to click on)

2. Click **Accept** on the top right side of the screen.



3. Navigate to the Review Path Section and populate the below mentioned fields.
 - a. **Reviewer Decision:** Select the decision from the given drop down menu.
 - i. **Approve:** Reviewer will review and recommend approval without any additional review
 - ii. **Reject/Cancel:** Reviewer will review and recommend record should be canceled.
 - iii. **Update Change Impacts:** Reviewer will review and determine that change impacts need to be updated.
 - iv. **Not Applicable:** Reviewer decision is not applicable.
 - b. **Reassign:** Select the option from the given drop down menu
Note: This option is only available if the Review & Coordination step allowed reviewers to Update the Record.
 - i. **Yes - Wrong User is Selected:** Record will be reassigned to other user for same Level review.



1. Navigate to the **Review Path** section and select the correct reviewer for the respective level. E.g., for Level 1 reviewer change > select the correct Level 1 Reviewer from the picker.

- ii. **Yes - Additional Review Required:** Record will be reassigned for next level review.
- iii. **No:** Record will not be re-assigned.

Note: Below conditions will be applicable when reviewer will review and reassign to another user.

- a. If the workflow is currently on step Level 1 Review, AND '**Reassign?**' field = '**Yes – Wrong User Selected**' then it routes back to Level 1 Review. The user would have selected a new user within the relevant level field user picker.
 - If on step Level 2, then level 2
 - If on step Level 3, then Level 3
 - If on step Level 4, then Level 4
 - If on step Additional Review, then Additional Review

Note: Below conditions will be applicable when reviewer will review and recommend approval with additional reviews

- b. '**Reviewer Decision**' field = '**Approve**' AND '**Reassign?**' field = 'No'
 - If the user is on step Level 1 Review and 'Level of Review Required' = Level 1 then it will route to step 'Implement Change'.
 - If the user is on step Level 2 Review and 'Level of Review Required' = Level 2 then it will route to step 'Implement Change'.
 - If the user is on step Level 3 Review and 'Level of Review Required' = Level 3 then it will route to step 'Implement Change'.
 - If the user is on step Level 4 Review and 'Level of Review Required' = Level 4 then it will route to step 'Implement Change'. If the user is on step Additional Review and 'Level of Review Required' = Level 5+ then it will route to step 'Implement Change'.
- c. '**Reviewer Decision**' field = '**Approve**' AND '**Reassign?**' field = '**Yes – Additional Review Required**'



- If the user is on step Level 1 Review and 'Level of Review Required' = Level 2 and 'Level 2' is not empty, then it will route for 'Additional Approval Required' to step 'Level 2 Review'.
 - If the user is on step Level 2 Review and field 'Level of Review Required' = Level 3 and 'Level 3' is not empty, then it will route for 'Additional Approval Required' to step 'Level 3 Review'.
 - If the user is on step Level 3 Review and field 'Level of Review Required' = Level 4 and 'Level 4' is not empty, then it will route for 'Additional Approval Required' to step 'Level 4 Review'.
 - If the user is on step Level 4 Review and field 'Level of Review Required' = Level 5+ and 'Additional' is not empty, then it will route for 'Additional Approval Required' to step 'Additional Review'.
 - If the user is on step Additional Review and field 'Level of Review Required' = Level 5+, then it will route for 'Additional Approval Required' to step 'Additional Review'.
- d. **'Reviewer Decision'** field = **'Update Change Impacts'** then the form is routed to step **'Review & Coordination.'**
- e. **'Reviewer Decision'** field = **'Reject/Cancel'** then the form is routed to terminal end.
- f. Click **Send**.

Save Draft More Actions ▼ **Send**

Attachments Comments Linked Records Linked Mail > []

📎 ▼

- a. Under **Action Details> Workflow Actions**, Select **Submit**

Workflow Action Details ✕

▼ Action Details

Workflow Actions *

Submit ▼

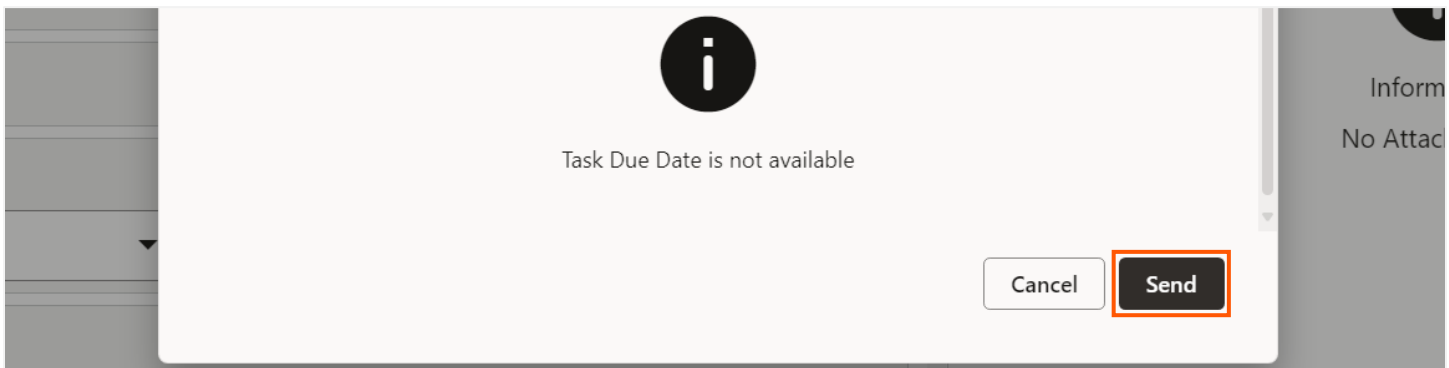
To

Send For
Level 2 Review

Save Draft

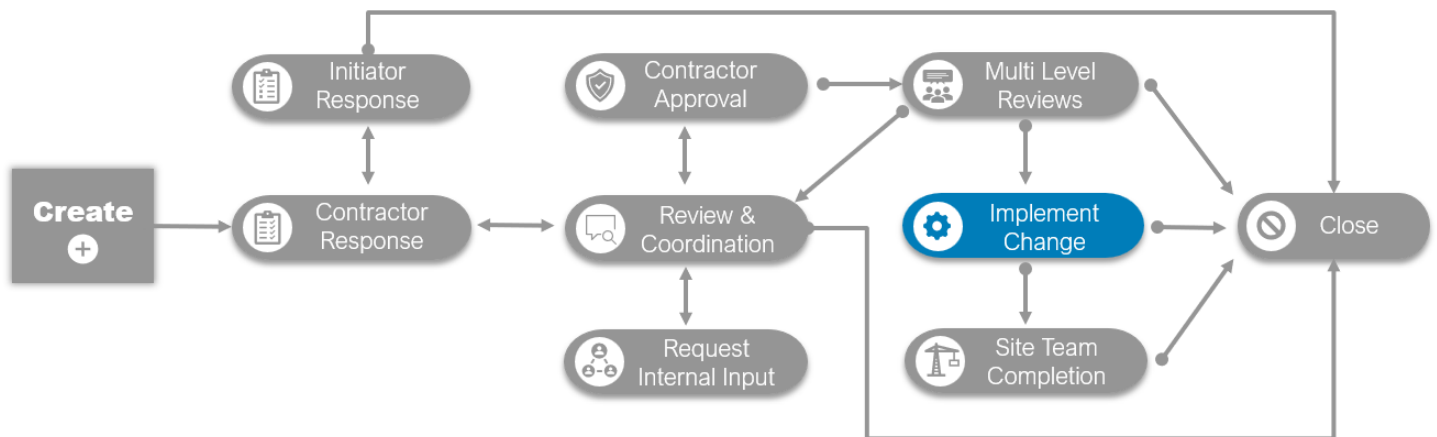
ts Linked Rec

- b. Click **Send**.

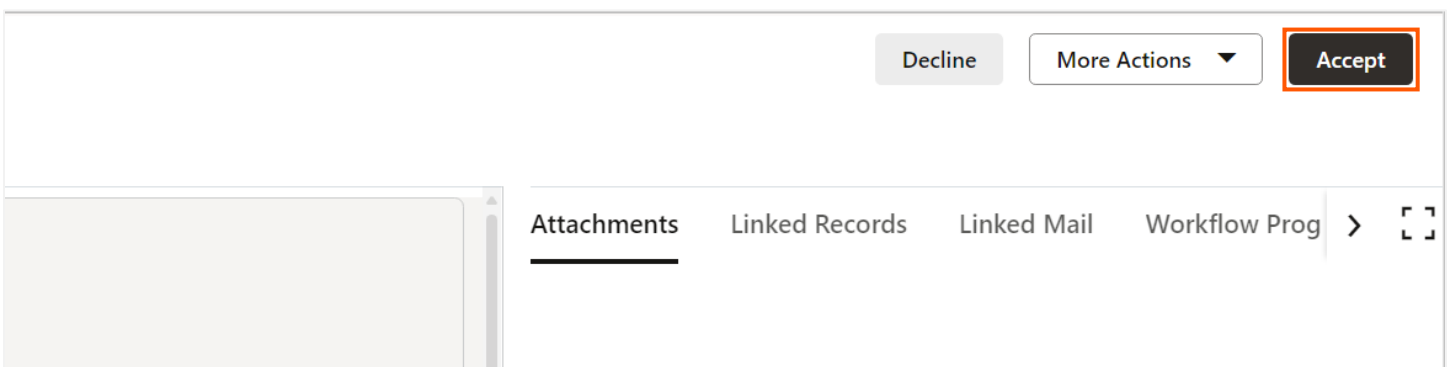


2.8 Implement Change of Change Notice or Backcharge

User Role(s): Implementers (Project Controls – Cost, Project Controls – Schedule)



1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task** Log will show available records.
 - b. Double-click the **Change Order** record to be responded.
(**Note:** Partner User will also receive an email with a link of the record to click on)
2. Click **Accept** on the top right side of the screen.



3. Navigate to the Review Path Section and select Reassign? Field from given drop down menu.



- a. **Yes - Wrong User Selected: Workflow**
- b. **Yes – Additional Review required:**
- c. **No:** Change Implementation is Completed
- d. **Note:**
 - i. If **'Reassign?'** field = **'No'** and Originating Organization is **TSS** then record routes to **Site Team Completion**.
 - ii. If **'Reassign?'** field = **'No'** and Originating Organization is **other than 'TSS'** then record routes to terminal end

> **Review Path**

Reassign? * ?

Select ▼

Required

4. Click **Send**.

Save Draft More Actions ▼ **Send**

Attachments Comments Linked Records Linked Mail > []

@ ▼

- a. Under **Action Details> Workflow Actions**, Select **Submit**
- b. **To:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select. The name can be searched using the Select function.

Workflow Action Details X

▼ Action Details

Workflow Actions * Send For Site Team Completion

Submit ▼

To

Start typing for suggestions... []

c. Click **Send**.



Reporting Purpose

Task Due Date

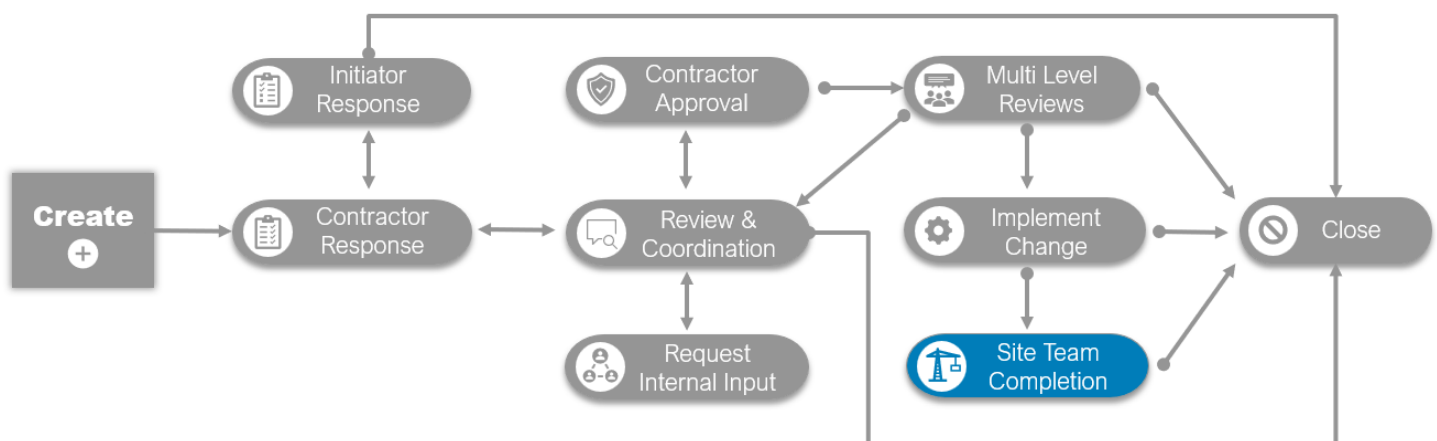
Task Due Date is not available

Cancel Send

Information
No Attachments.

2.9 Site Team Completion of Chang Notice or Backcharge

User Role(s): Construction Team



- In the left Navigator, click the **Tasks** option in the Navigator
 - The **Task** Log will show available records.
 - Double-click the **Change Order** record to be responded.
(**Note:** Partner User will also receive an email with a link of the record to click on)
- Click **Accept** on right top side of the screen.

Decline More Actions Accept

Attachments Linked Records Linked Mail Workflow Prog > []

- Navigate to the **Review Path** Section and select Reassign? field from the given drop down menu.
 - Yes - Wrong User Selected:** Record will be routed to **Site Team Completion**
 - Yes – Additional Review required:** Record will be routed to **Site Team Completion**
 - No:** Record will route to terminal end.



> Review Path

Reassign? * ?

Select

Required

4. Click **Send**.

Save Draft

More Actions ▼

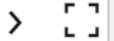
Send

Attachments

Comments

Linked Records

Linked Mail



- Under **Action Details> Workflow Actions**, Select **Submit**
- To:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select. The name can be searched using the Select function.

Workflow Action Details X

☒ **Action Details**

Workflow Actions * Send For

Submit Site Team Completion

To

Start typing for suggestions...

c. Click **Send**.

Reporting Purposes

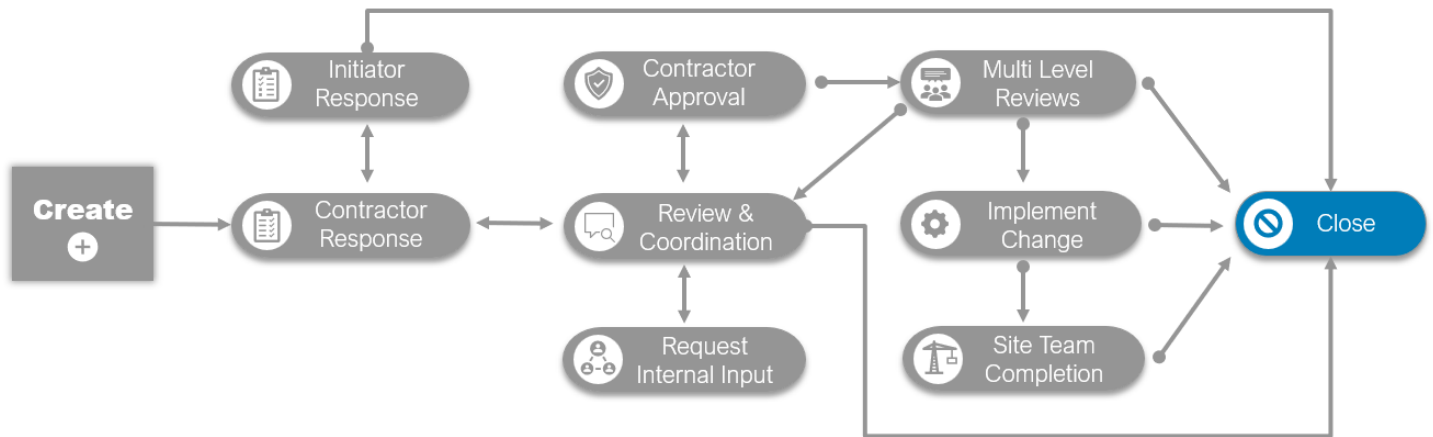
Task Due Date

Task Due Date is not available

Cancel **Send**

Information
No Attachments.

2.10 Closure of Change Order Notice

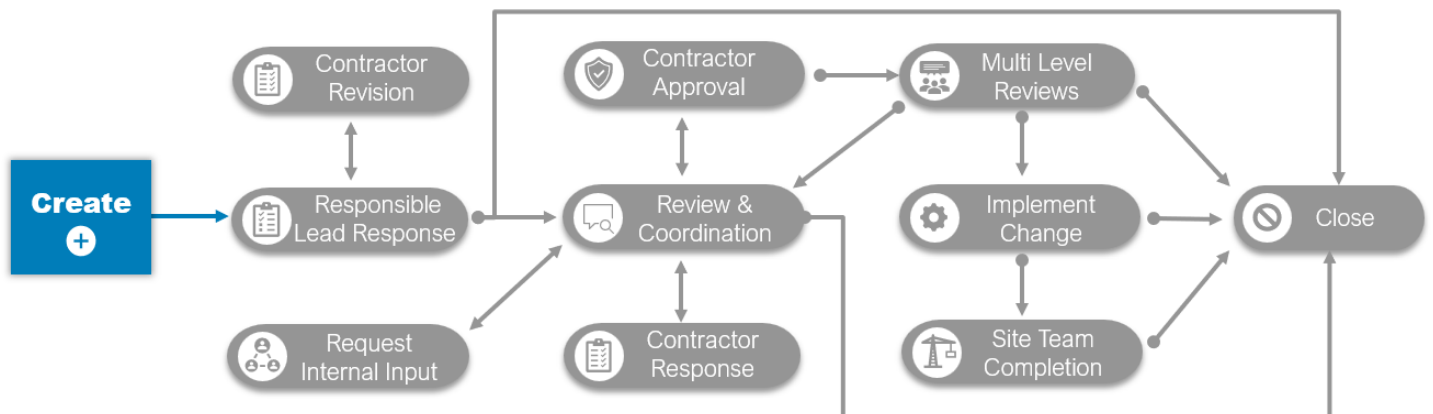


1. Change Order Notice or Backcharge record has now reached to the terminal end by below ways:
 - a. Completion of the Change Order Notice or Backcharge record
 - b. Rejection or cancellation of Change Order Notice or Backcharge record

Partner User Initiation (Change Request)

2.11 Create Change Request Record

User Role(s): Initiator - Partner Users (Partner Contractors & Partner Engineers)



1. In the left Navigator, click **Change Management > Change Order**
2. Click **+ Create**



Change Management

Change Order

Design Change Notices

Change Order

+ Create

Actions

View : All Records

Record No

Title

Creator

3. In the **General** section of the **Create New Change Order** window, populate below mentioned fields:

Title	Use a clear and concise title that summarizes the content or purpose of the Change Request record. Avoid using unnecessary words to ensure the title remains within the 50-character limit.
Due Date	Select the due date from the provided calendar icon. The due date is the entire workflow completion date.

Title *

Priority

Select

Due Date *

MM/DD/YYYY HH:MM AM

Originator

Baluvuri Kumar- Project Engine...

4. Navigate to the **Overview** Section and select **Change Type**

Change Type	This field will be auto populated with “Change Request.” It is a read-only field
PO #	In this field, please enter PO number associated with the Change Request

Overview

Change Type

Change Request

PO # *

PO #

5. Navigate to **Change Notice/ Request Contractor Update** Section and select below mentioned details.

Cost Impact	Select Yes or No from the given drop down menu according to the impact on cost due to change request.
Schedule Impact	Select Yes or No from the given drop down menu according to the impact on cost due to change request.
Contractor Response	Provide detailed description of the change request in 4000 or less words.



▼ **Change Notice / Request Contractor Update**

Cost Impact *

Select ▼

Required

Estimated Cost Impact

\$0.00

Contractor Response *

Required

Schedule Impact *

Select ▼

Required

Estimated Calendar Days Impact

0

6. Navigate to **Cost Details** Tab > click **Add**.

Change Order **Cost Details** Impacted Activities

Add Actions ▼ ↺ ↻ 🔍 ☰

No. ▼	📎	⚙️...	Change Type	PO Impact	PO Line-Item	PO Line-Item Qty
-------	---	-------	-------------	-----------	--------------	------------------

- a. Navigate to **Contractor Estimate** block and update the details. (**Note:** Complete all the available fields as applicable to define the cost or schedule impacts related to the Change Request)

Change Order

Change Order **Cost Details** Impacted Activities

Add Actions ▼ View Currency Transaction Currency ▼

No. ▼	📎	⚙️...	Change Type	PO Impact	PO Line-Item	PO Line-Item Qty	PO Line-Item
-------	---	-------	-------------	-----------	--------------	------------------	--------------

Contractor Estimate

Estimate Calendar Days Impact

0

Terms of Cost

Select ▼

Item Quantity

0

Unit of Measure

each ▼

Item Unit Cost

\$0.00

- b. Under **Final Terms** section of the Line-Item Details, select Cost Code
Cost Code: In this field, 'Start typing CBS code or name for suggestions and select the CBS code or the name.


Cost Code

In this field, there is only one cost code available, and it is named "**Contractor Placeholder Cost Code**." 'Start typing CBS name for suggestions and select the CBS Code/Name.




Line Item Details Attachments Linked Records

Cost Code *



Type CBS Code or Name... 

Required

Code Name

- c. Or click on the checklist icon  to select the CBS code or the name. A **Cost Code Picker** window will open. Select the option **Contractor Placeholder Cost Code**.

Cost Code Picker


 

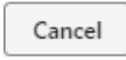


CBS Code	CBS Item	Status	Summary Code?
P0-_-_-_-_-	Contractor Placeholder cost Code	Active	

7. Populate all the mandatory & optional details in Line Item Details.

8. Click **Save** or **Save & Add New**.

Save	Select this Option when only one line item to be added.
Save & Add New	Select this option when more than one line item to be added. Repeat step no 6 to add details.



9. Click **Send** from the top right side of the screen.



Records 



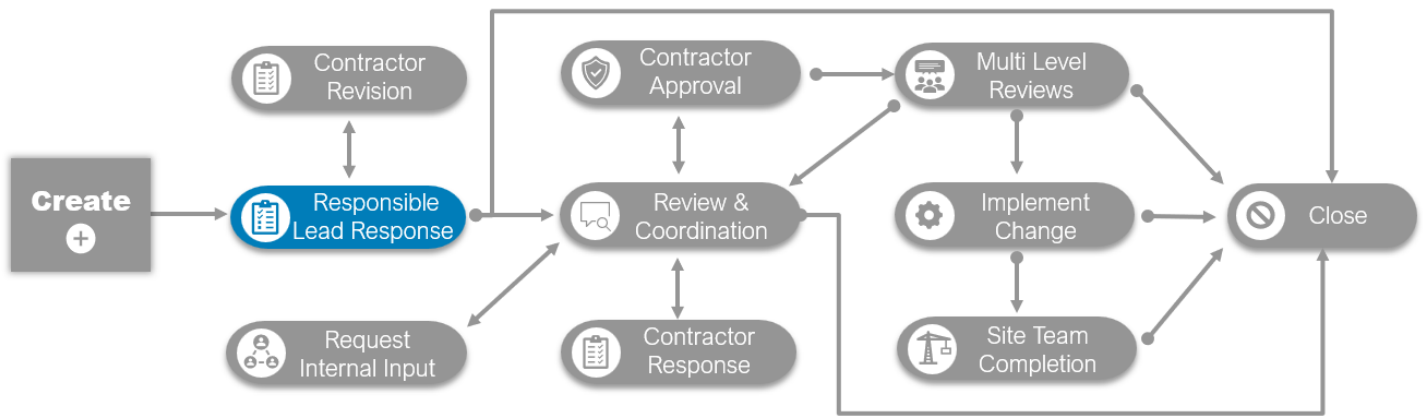
- a. **Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select **Submit**.

To	Start typing name of the Company Lead responsible for your element of work for suggestions or select the Company Lead's name from selection icon
CC	This field is auto populated

- b. Click **Send**.

2.12 Responsible Lead Response to Change Request

User Role(s): Responsible Lead (Track Leads, Construction Team, Project Engineers, Construction Managers)



1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task** Log will show available records.
 - b. Double-click the **Change Order** record to be responded.(Note: Partner User will also receive an email with a link of the record to click on)

✓	📎	Origin	Business Process	Record Number	Title
✓		Project_Demo_TSS	Change Order	CO-00060	Change Request T...
✓		Project_Demo_TSS	Internal Document...	IDR-000019	ABC
✓		Project_Demo_TSS	Design Change No...	DCN-000019	Test

2. Click Accept on the top right side of the page.

Change Order

Decline More Actions Accept

Change Order Cost Details Impacted Activities

Task Details

From

Attachments Linked Records

3. Navigate to the **Overview** Section and populate the PO details.
 - a. Review the PO # entered by the Partner User. In the editable PO # field, click the text box ("Start typing for suggestions...") and type the correct purchase order name or number. The PO details can also be searched using the Select function



▼ **Overview**

Change Type ?

Change Request

PO # ? PO # * ?

123 AGL10010344

☑ ✕

- b. Provide **Change Description** in 4000 or fewer words.

Change Description *

Required

4. Navigate to the **Review Path** Section and populate the below details:
- a. **Review Coordinator:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person who should coordinate the review of the Change Request.
 - b. The Reviewer Coordinator name can also be searched using the Select function ☑

▼ **Review Path**

Review Coordinator *

Type a Name... ☑


Required

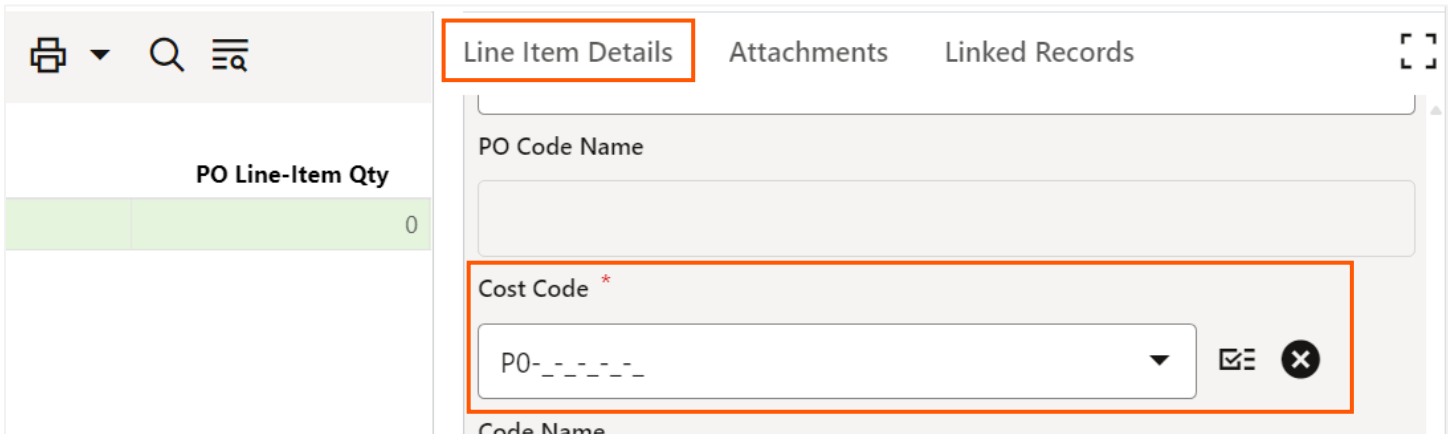
Note: Refer to *BU-specific User Guide* for BU-specific instructions on who to select for this role [EPPM Training Homepage](#)

5. Navigate to the **Cost Detail** tab and select the line item.

Change Order		Cost Details		Impacted Activities	
☰	☰	Add	Actions ▼	View Currency	Transaction Currency ▼
☑	☑	☑	☑	☑	☑
No. ▼	Change Type	PO Impact	PO Line-Item	PO Line-Item Qty	
001	Change Request		0	0	



- a. Under Line item details, replace the generic **Contractor Placeholder Cost Code** with the correct code for the requested change.
- b. Click  icon to remove the existing **Contractor Placeholder Cost Code**.



Line Item Details Attachments Linked Records


PO Code Name

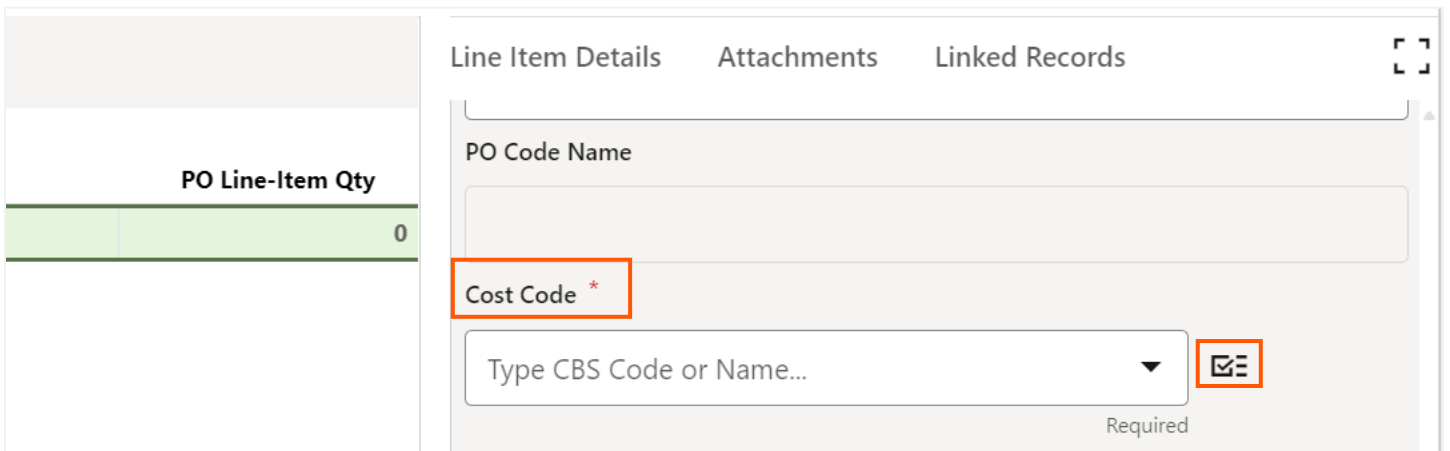
PO Line-Item Qty 0

Cost Code *

P0-_-_-_-

Code Name

- c. Now Start typing the Cost Code or Name in the Cost Code field to select the Cost code from the given list. Also, you can click on the checklist icon  and select the Cost Code from Cost Code Picker Window.



Line Item Details Attachments Linked Records

PO Code Name

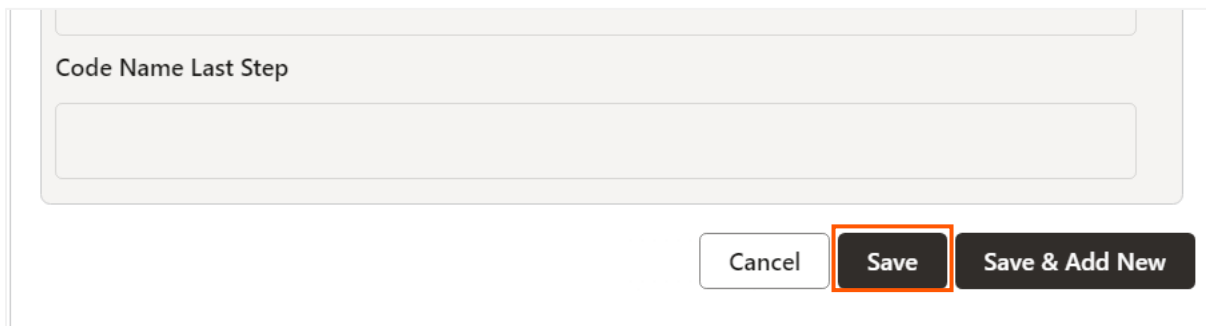
PO Line-Item Qty 0

Cost Code *

Type CBS Code or Name...

Required

- d. Click **Save**.



Code Name Last Step

Cancel Save Save & Add New

6. Click **Send**.



Save Draft

More Actions ▼

Send

Line Item Details

Attachments

Linked Records

- a. **Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select **Clarify** or **Submit for Review** from the drop down menu.

Clarify	Submit for Review	Cancel
<ul style="list-style-type: none">If the record needs any clarification from Change Request Initiator, then follow the steps from 2.12.1 Clarify	<ul style="list-style-type: none">If record needs to be sent for the review, then follow the steps from 2.12.2 Submit for Review	<ul style="list-style-type: none">If the record needs to be cancelled, then follow the steps from 2.12.3 Cancel

2.12.1 Clarify

5. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Clarify from the drop down menu.
To	This field is auto populated with CO Change Request Initiator
CC	Select users in the CC field who need to be informed/ notified regarding the clarification. Select the users in cc field from the selection icon



Workflow Action Details ✕

▼ **Action Details**


Workflow Actions * Send For
Clarify Contractor Revision

To
Hariharanath Maganti- Partner Contractor

CC
Start typing for suggestions... ☑

▼ **Due Date Details**

Task Due Date



Task Due Date is not available

Cancel **Send**

6. Click **Send**.

2.12.2 Submit for Review

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Submit for Review from the drop down menu.
To	The field is auto populated with Review Coordinator selected in Step 2.12 Step 4 above
CC	In this field, select the users who should be notified regarding the Change Request submission for Review & Coordination step. The names of the desired users should be added to the CC field using the select icon 



Workflow Action Details ✕

▼ **Action Details**

Workflow Actions *

Submit for Review ▼

Send For
Review & Coordination

To

Company Administrator

CC

Hariharanath Maganti- Partner Contractor ✕

▼ **Due Date Details**

Task Due Date

Task Due Date is not available

Cancel

Send

2. Click **Send**.

2.12.3 Cancel

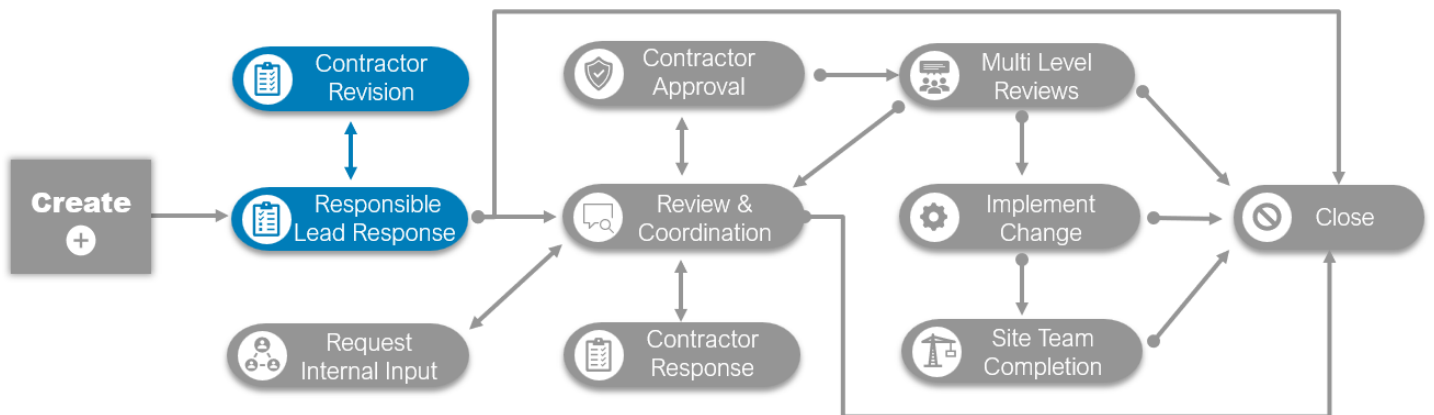
- Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Cancel from the drop down menu
CC	In this field, select the users who should be notified regarding the Change Request cancellation. The names of the desired users can be added to the CC field using the select icon

2. Click **Send**. The record reaches terminal end from here.

2.13 Contractor Revision of Change Request

User Role(s): Partner Users (Partner Contractors & Partner Engineers)



1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task Log** will show available records.
 - b. Double-click the **Change Order** record to be responded.(**Note:** Partner User will also receive an email with a link of the record to click on)



Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

Create

Actions

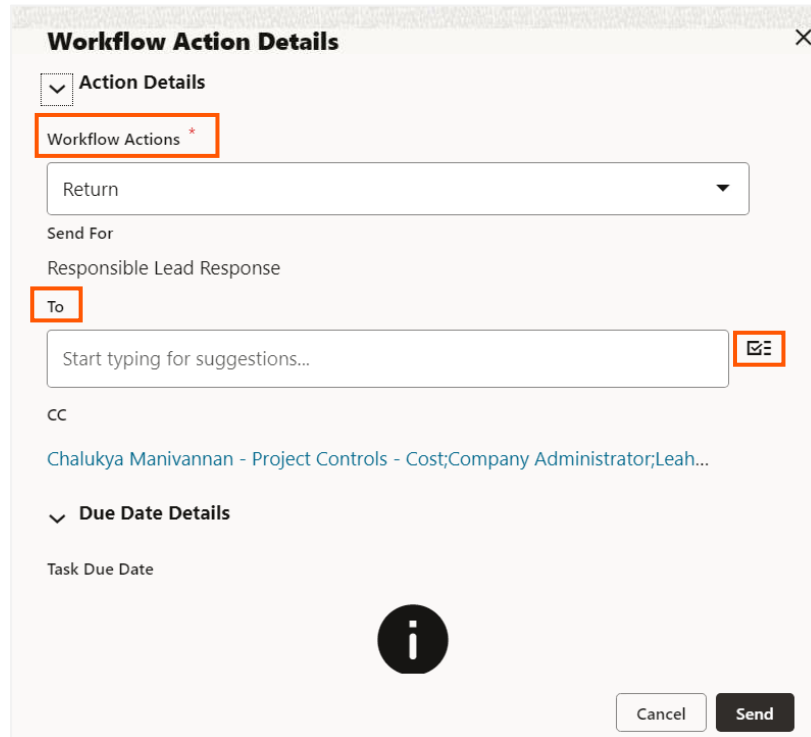
View: Received in last 7 days

	Origin	Business Process	Record Number	Title	Record Due	From	Sent for
	Project_Demo_TSS	Change Order	CO-00061	change req...	09/27/2024 05:00 ...	Baluvuri Kumar- Pr...	Contractor Revision
	Project_Demo_TSS	Change Order	CO-00059	test b	09/19/2024 08:00 ...	Soumitra Mandal - ...	Contractor Response
	Project_Demo_TSS	Change Order	CO-00058	test9876	09/26/2024 08:00 ...	Soumitra Mandal - ...	Contractor Response
	Project_Demo_TSS	Change Order	CO-00055	test_backch...	09/20/2024 08:00 ...	Company Adminis...	Contractor Approval



- a. **Return:** Select this option when all the requested information from contractor is updated in the record and record to be sent back Contractor Response.

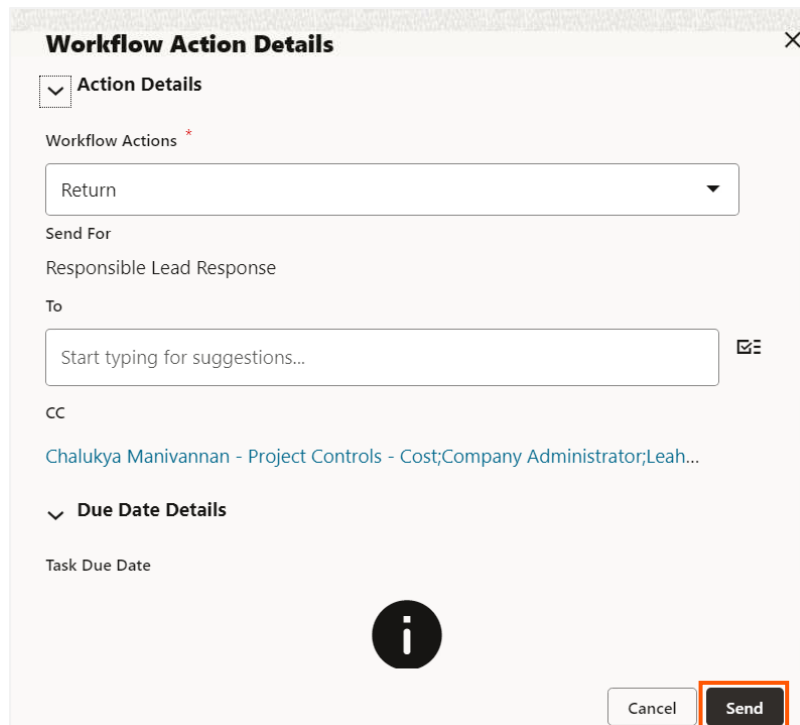
To	In this field, start typing name of the Responsible Lead for suggestions or select the Responsible Lead name from selection icon
CC	This field is auto populated



The dialog box titled "Workflow Action Details" contains the following elements:

- Action Details:** A section with a dropdown menu labeled "Workflow Actions" (highlighted with a red box) showing "Return".
- Send For:** Labeled "Responsible Lead Response".
- To:** A text input field (highlighted with a red box) with the placeholder "Start typing for suggestions..." and a selection icon (highlighted with a red box).
- CC:** A list of email addresses: "Chalukya Manivannan - Project Controls - Cost;Company Administrator;Leah...".
- Due Date Details:** A section with a label "Task Due Date".
- Buttons:** "Cancel" and "Send" buttons at the bottom right.
- Information Icon:** A large black circle with a white 'i' in the center.

- b. Click **Send**.

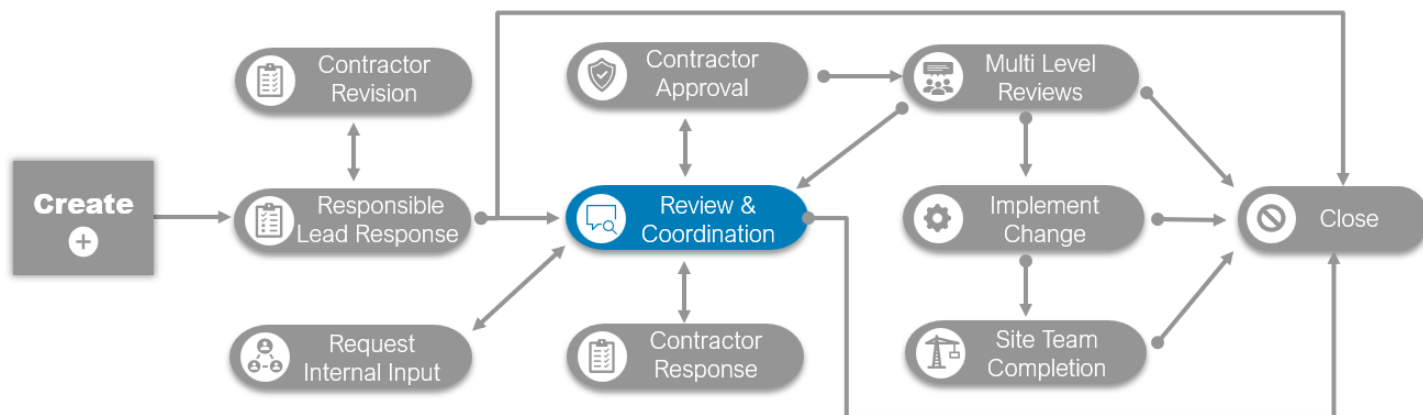


This is the same "Workflow Action Details" dialog box as above, but with the "Send" button highlighted with a red box.



2.14 Review & Coordination of Change Request

User Role(s): All Project Users



1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task Log** will show available records.
 - b. Double-click the **Change Order** record to be responded.**(Note: Partner User will also receive an email with a link of the record to click on)**

Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

Create Actions View: All Tasks

Origin	Business Process	Record Number	Title	Record Due	From	Sent for
Project_Demo_TSS	Change Order	CO-00061	change request	09/27/2024 04:00 PM	Baluvuri Kumar- Project Engineer,...	Review & Coordination
Project_Demo_TSS	Change Order	CO-00060	Change Request Test	09/30/2024 04:00 PM	Baluvuri Kumar- Project Engineer,...	Review & Coordination
Project_Demo_TSS	Project Change Request	PCR-00024	Conversion Testing ...	10/29/2024 07:46 AM	Company Administrator, SoCo	Review & Coordination
Project_Demo_TSS	Change Order	CO-00057	Notice-1	09/30/2024 07:00 PM	Company Administrator, SoCo	Level 2 Review

2. Click **Accept** on the top right side of the screen.

Decline

More Actions

Accept

Attachments

Linked Records

Linked Mail

Workflow Prog

3. Review the response received from Responsible Lead and CO Request form.
4. Navigate to Change Notice / Request SoCo update and populate the below details.
 - a. **SoCo Cost Review Completed?** Select Yes if cost review is completed. Select No if cost review is not completed.
 - b. **SoCo Schedule Review Completed?** Select Yes if schedule review is completed. Select No if schedule review is not completed.



Change Order Cost Details Impacted Activities

▼ **Change Notice / Request Soco Update**

SoCo Cost Review Completed? *

Select ▼

Required

Final Terms Cost Impact

\$0.00

SoCo Schedule Review Completed? *


Select ▼

Required

Final Terms Calendar Days Impact

0

1. Navigate to Review Path Section and select the below mentioned fields.
 - a. **Allow Reviewer to Update?** Select either **Yes** or **No**
Note: this refers to the internal Approvers. Choosing Yes will allow the approvers to make changes to or reassign the record.
 - b. **Level of Review Required?** Select the levels of review required from given drop down menu

Note: This refers to the level of internal Approval (not review) required to finalize the Change Order and may be based on Spend Authority or other procedures. Refer to BU-specific User Guides for further guidance on selecting the appropriate Level of Review" [EPPM Training Homepage](#)
 - c. **Level 1:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 1 reviewer. The name also can be searched using the Select function 
 - d. **Level 2:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 2 reviewer. The name also can be searched using the Select function.
 - e. **Level 3:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 3 reviewer. The name also can be searched using the Select function.
 - f. **Level 4:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Level 4 reviewer. The name also can be searched using the Select function.
 - g. **Additional:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the Additional reviewer. The name also can be searched using the Select function.



Review Path

Review Coordinator

Company Administrator

Allow Reviewer to Update? *

Yes

Level of Review Required *

Level 4

Level 1

Type a Name...

Level 2

Type a Name...

Level 3

Type a Name...

Level 4

Type a Name...

Additional

Type a Name...

2. Click **Send**

Save Draft More Actions **Send**

Attachments Linked Records Linked Mail Workflow Prog >

3. **Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select any one of the below mentioned options.

Request Contractor Input	Request Contractor Approval	Request Internal Input	Reject / Cancel
<ul style="list-style-type: none">If additional input is needed from the Partner User or to continue negotiations with the Partner User, then follow the steps from 2.14.1 Request Contractor Input	<ul style="list-style-type: none">Select this option after all necessary Internal Input has been received and Southern Company is ready for the Partner User to Approve the Change Notice or Backcharge. Note, this step comes before the Level 1 Internal Approval steps. Follow the	<ul style="list-style-type: none">If record needs to be sent for the review, then follow the steps from 2.14.3 Request Internal Input	<ul style="list-style-type: none">If the record needs to be cancelled, then follow the steps from 2.14.4 Reject / Cancel

steps from [2.14.2 Request Contractor Approval](#)

Workflow Action Details X

✓ Action Details

Workflow Actions * Send For

Select ▼

- Select
- Request Contractor Input
- Request Contractor Approval
- Request Internal Input
- Reject / Cancel

Cancel Send

2.14.1 Request Contractor Input

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields.

Workflow Actions	Select Request Contractor Input from the drop down menu.
To	Field will be auto populated with CO Change Request Initiator name.
CC	Select users in the CC field from whom the input is required. The names of the desired additional Internal Reviewers should be added to the CC field using the select icon



Workflow Action Details

▼ Action Details

Workflow Actions *

Request Contractor Input

Send For
Contractor Response

To
Hariharanath Maganti- Partner Contractor

CC

Start typing for suggestions...

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

2. Click **Send**.

2.14.2 Request Contractor Approval

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields

Workflow Actions	Select Request Contractor Approval from the drop-down menu.
To	Field will be auto populated with CO Change Request Initiator name.
CC	Select users in the CC field from whom the internal input is required. The names of the desired additional Internal Reviewers should be added.



2. Click **Send**.

2.14.3 Request Internal Input

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields

Workflow Actions	Select Request Internal Input from the drop-down menu.
To	Field will be auto populated with Review Coordinator name.
CC	Field will be auto populated with CO Change Request Initiator name. Additionally, select users in the CC field from whom internal input is required. The names of the desired additional Internal Reviewers should be added.



Workflow Action Details

▼ Action Details

Workflow Actions *

Request Internal Input ▼

Send For
Review & Coordination

To
Company Administrator

CC

Hariharanath Maganti- Partner Contractor ×

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

2. Click **Send**.

2.14.4 Reject / Cancel

1. Under **Workflow Actions Details > Actions Details > Workflow Actions**, populate below mentioned fields

Workflow Actions	Select Reject / Cancel from the drop-down menu.
CC	Select users in the CC field to be notified. The names of the desired additional users should be added to the CC field using the select icon



Workflow Action Details ✕

▼ Action Details

Workflow Actions *
Reject / Cancel

Send For
End

cc
Start typing for suggestions...

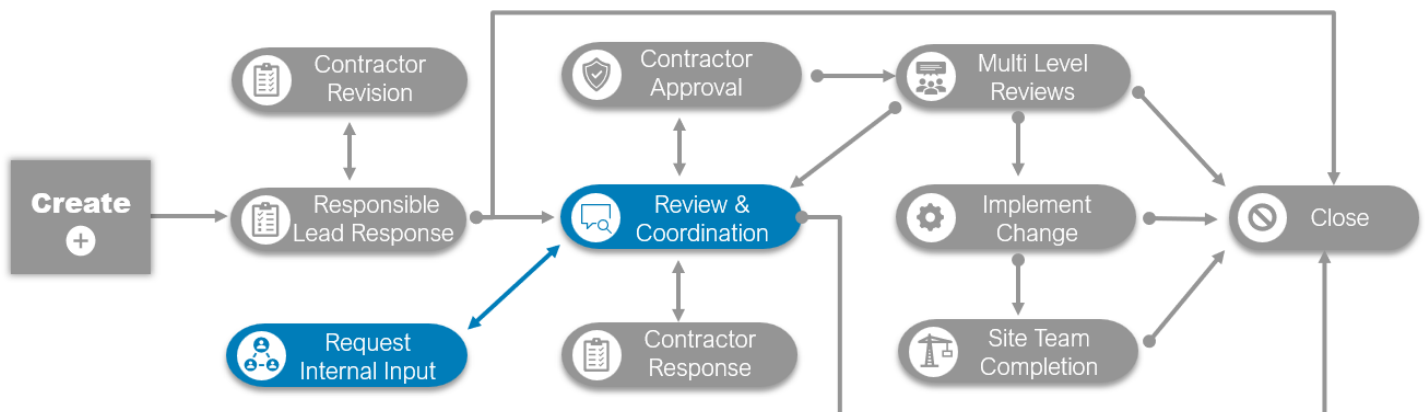
Cancel Send

2. Click **Send**

2.15 Request Internal Input for Change Request

User Role(s): All Project Users

Note: This step is for Users that have been requested to provide additional Internal Input regarding a Partner User-initiated Change Request



2. In the left Navigator, click the **Notification** option in the Navigator
 - a. The **Notification** Log will show available records.
 - b. Double-click the **Change Order** record to be responded.

(Note: User will also receive an email with a link of the record to click on)



Tasks	Notifications					
Notifications	Actions View: (Modified) All Notifications					
Drafts	Business Process	From	Title	Record Number	Origin	Received
Shell Access Request	Change Order	Soumitra Mandal -...	test b	CO-00059	Project_Demo_TSS	09/17/2024 04:46 ...
Document Manager	Change Order	Soumitra Mandal -...	test9876	CO-00058	Project_Demo_TSS	09/17/2024 04:29 ...
Information	Change Order	Soumitra Mandal -...	Notice-1	CO-00057	Project_Demo_TSS	09/17/2024 01:46 ...
Project Planning an...	Change Order	Hariharanath Mag...	Notice-1	CO-00057	Project_Demo_TSS	09/17/2024 02:04 ...
	Change Order	Rashmi Singh-Proj...	Notice-1	CO-00057	Project_Demo_TSS	09/17/2024 02:21 ...
	Change Order	Rashmi Singh-Proj...	Notice-1	CO-00057	Project_Demo_TSS	09/17/2024 04:59 ...
	Change Order	Hariharanath Mag...	Notice-1	CO-00057	Project_Demo_TSS	09/17/2024 05:00 ...

3. Click on the **Comments** tab > Provide additional input requested by Review Coordinator in the Comments tab > Click **Post**.

Change Order

Cost Details

Impacted Activities

Status

Potential

Priority

Originator

Attachments

Comments

Linked Records

Linker

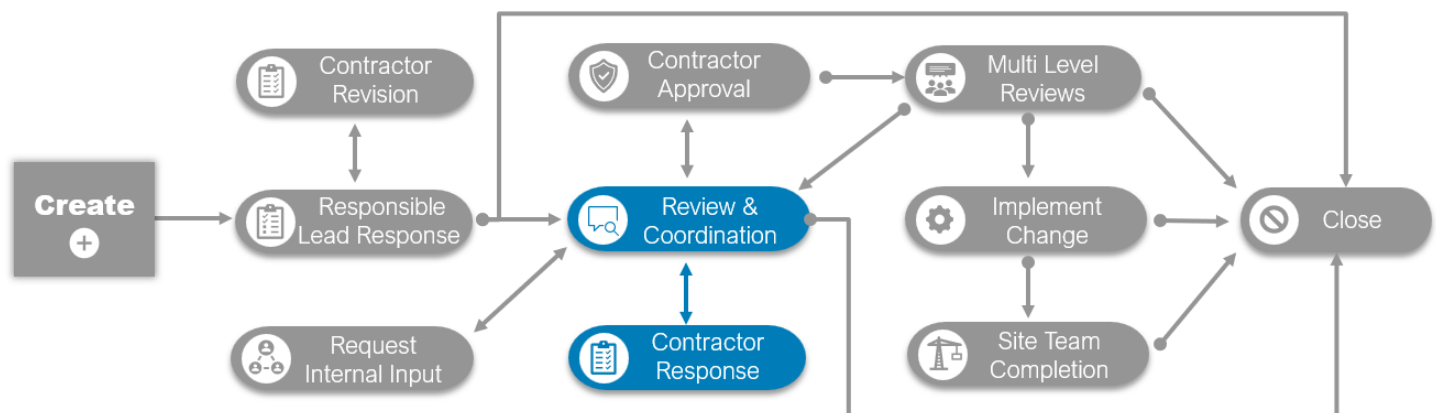
Clear

Post

4. Close the record.

2.16 Contractor Response to Change Request

User Role(s): Partner Users (Partner Contractors & Partner Engineers)





1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task Log** will show available records.
 - b. Double-click the **Change Order** record to be responded.(**Note:** Partner User will also receive an email with a link of the record to click on)

	Origin	Business Process	Record Number	Title	Record Due	From	Sent for
<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00061	change req...	09/27/2024 05:00 ...	Company Adminis...	Contractor Response
<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00059	test b	09/19/2024 08:00 ...	Soumitra Mandal ...	Contractor Response
<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00058	test9876	09/26/2024 08:00 ...	Soumitra Mandal ...	Contractor Response
<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00055	test_backch...	09/20/2024 08:00 ...	Company Adminis...	Contractor Approval

2. Click **Accept** on the top right side of the screen.

Decline More Actions **Accept**

Attachments Linked Records Linked Mail Workflow Prog > []

3. Act on the comments received from Review & Coordination Step.
4. Click **Send**

Save Draft More Actions **Send**

Attachments Linked Records Linked Mail Workflow Prog > []

[]

5. **Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select **Return**.

To	Field will be auto populated with Review Coordinator name.
CC	Field will be auto populated with CO Change Request Initiator name. Additionally, select users in the CC field from whom internal input is required. The names of the desired additional Internal Reviewers should be added to the CC field using the select icon



Workflow Action Details

▼ Action Details

Workflow Actions *

Return

Send For
Review & Coordination

To
Company Administrator

CC

Hariharanath Maganti- Partner Contractor X

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

6. Click **Send**

Workflow Action Details

▼ Action Details

Workflow Actions *

Return ▼

Send For
Review & Coordination

To
Company Administrator

CC

Hariharanath Maganti- Partner Contractor X

▼ Due Date Details

Task Due Date

i

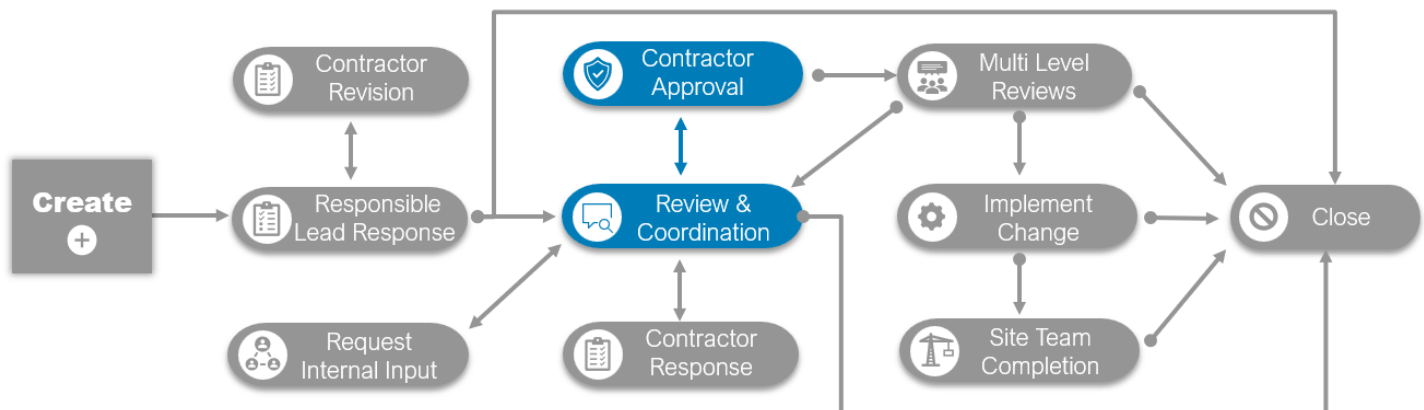
Task Due Date is not available

Cancel

Send

2.17 Contractor Approval of Change Request

User Role(s): Initiator Partner Users (Partner Contractors & Partner Engineers)



1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task Log** will show available records.
 - b. Double-click the **Change Order** record to be responded.
(**Note:** Partner User will also receive an email with a link of the record to click on)



Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

+ Create

Actions

View: Received in last 7 days

<input checked="" type="checkbox"/>		Origin	Business Process	Record Number	Title	Record Due	From	Sent for	
<input checked="" type="checkbox"/>		Project_Demo_TSS	Change Order	CO-00061	change req...	09/27/2024 05:00 ...	Company Adminis...	Contractor Approval	
<input checked="" type="checkbox"/>		Project_Demo_TSS	Change Order	CO-00059	test b	09/19/2024 08:00 ...	Soumitra Mandal - ...	Contractor Response	
<input checked="" type="checkbox"/>		Project_Demo_TSS	Change Order	CO-00058	test9876	09/26/2024 08:00 ...	Soumitra Mandal - ...	Contractor Response	
<input checked="" type="checkbox"/>		Project_Demo_TSS	Change Order	CO-00055	test_backch...	09/20/2024 08:00 ...	Company Adminis...	Contractor Approval	



Save Draft

More Actions ▾

Send

08/02/2024 04:10 AM

Record Last Update Date

08/05/2024 03:24 AM

Attachments

Linked Records

Linked Mail

> []

a. **Note:**

- If **Release Approval & Acknowledgement Approval** are selected as **Approve**, then workflow will progress to Level 1 Review.
- If any of the **Release Approval & Acknowledgement Approval** are selected as **Reject**, then workflow will progress to **Review & Coordination**.

- b. **Workflow Actions Details** Window will open. In **Action Details > Workflow Actions** select **Submit**.

Condition 1: Release Approval and Acknowledgement Approval = Approve

To	Field will be auto populated with Level 1 Reviewer name as selected in step 2.14 in this guide.
CC	Field will be auto populated with CO Change Request Initiator name. Additionally, select users in the CC field from whom internal input is required. The names of the desired additional Internal Reviewers should be added to the CC field using the select icon



Workflow Action Details

▼ Action Details

Workflow Actions *

Submit ▼

Send For

Level 1 Review

To

Company Administrator

CC

Hariharanath Maganti- Partner Contractor ×

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

Condition 2: Release Approval or Acknowledgement Approval = Reject

To	Field will be auto populated with Review Coordinator name.
CC	Field will be auto populated with CO Change Request Initiator name. Additionally, select users in the CC field from whom internal input is required. The names of the desired additional Internal Reviewers should be added to the CC field using the select icon



Workflow Action Details

▼ Action Details

Workflow Actions *

Submit ▼

Send For

Review & Coordination

To

Company Administrator

CC

Hariharanath Maganti- Partner Contractor ×

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

c. Click **Send**.



Workflow Action Details

▼

Action Details

Workflow Actions *

Submit

Send For

Level 1 Review

To

CC

Hariharanath Maganti- Partner Contractor X

▼

Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

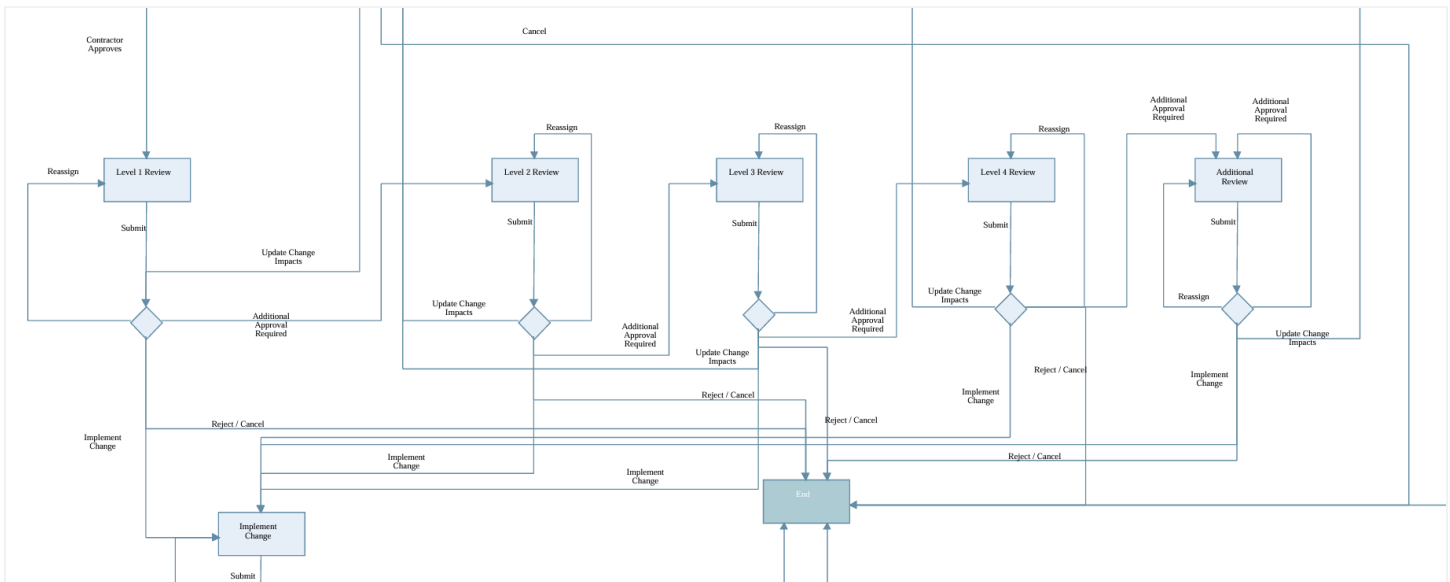
Send

2.18 Multi Level Reviews of Change Request

User Role(s): All Project Users



Multi-Level Reviews: This step includes multiple levels of review as selected in step 2.4 Review & Coordination of Change Notice or Backcharge.



1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task Log** will show available records.
 - b. Double-click the **Change Order** record to be responded.

(Note: Partner User will also receive an email with a link of the record to click on)

Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

+ Create

Actions

View: All Tasks

	Origin	Business Process	Record Number	Title	Record Due	From	Sent for
	Project_Demo_TSS	Change Order	CO-00061	change request	09/27/2024 04:00 PM	Hariharanath Maganti- Partner C...	Level 1 Review
	Project_Demo_TSS	Project Change Request	PCR-00127	Conversion Testing ...	10/30/2024 05:58 AM	Company Administrator, SoCo	Review & Coordination
	Project_Demo_TSS	Project Change Request	PCR-00133	Conversion Testing ...	10/30/2024 05:58 AM	Company Administrator, SoCo	Review & Coordination

2. Click **Accept** on the top right side of the screen.

Decline

More Actions

Accept

Attachments

Linked Records

Linked Mail

Workflow Prog

3. Navigate to the Review Path Section and populate the below mentioned fields.
 - a. **Reviewer Decision:** Select the decision from the given drop-down menu.

Approve	Reviewer will review and recommend approval without any additional review
Reject/Cancel	Reviewer will review and recommend record should be canceled
Update Change Impacts	Reviewer will review and determine that change impacts need to be updated

**Not
Applicable**

Reviewer decision is not applicable

b. **Reassign:** Select the option from the given drop-down menu

Yes - Wrong User is Selected	The record will be reassigned to another user for the same Level of review
Yes - Additional Review Required	The record will be reassigned for Review & Coordination
No	Record will not be re-assigned

Note: Below conditions will be applicable when reviewer will review and recommend approval with additional reviews.

- If the workflow is currently on step Level 1 Review, AND 'Reassign?' field = 'Yes – Wrong User Selected' then it routes back to Level 1 Review. The user would have selected a new user within the relevant level field user picker.
 - If on step Level 2, then level 2
 - If on step Level 3, then Level 3
 - If on step Level 4, then Level 4
 - If on step Additional Review, then Additional Review
 - If the workflow is currently on step Additional Review, AND 'Reassign?' field = 'Yes – Additional Review Required' then it routes back to Additional Review. Note the user would have selected a new user within the 'Additional' user picker field. (Refer Section 2.6 > 6)
- 'Reviewer Decision' field = **Approve** AND 'Reassign?' field = 'No'



- If the user is on step Level 1 Review and 'Level of Review Required' = Level 1 then it will route to step 'Implement Change'.
 - If the user is on step Level 2 Review and 'Level of Review Required' = Level 2 then it will route to step 'Implement Change'.
 - If the user is on step Level 3 Review and 'Level of Review Required' = Level 3 then it will route to step 'Implement Change'.
 - If the user is on step Level 4 Review and 'Level of Review Required' = Level 4 then it will route to step 'Implement Change'. If the user is on step Additional Review and 'Level of Review Required' = Level 5+ then it will route to step 'Implement Change'.
- c. **'Reviewer Decision' field = 'Approve' AND 'Reassign' field = 'Yes – Additional Review Required'**
- If the user is on step Level 1 Review and 'Level of Review Required' = Level 2 and 'Level 2' is not empty, then it will route for 'Additional Approval Required' to step 'Level 2 Review'.
 - If the user is on step Level 2 Review and field 'Level of Review Required' = Level 3 and 'Level 3' is not empty, then it will route for 'Additional Approval Required' to step 'Level 3 Review'.
 - If the user is on step Level 3 Review and field 'Level of Review Required' = Level 4 and 'Level 4' is not empty, then it will route for 'Additional Approval Required' to step 'Level 4 Review'.
 - If the user is on step Level 4 Review and field 'Level of Review Required' = Level 5+ and 'Additional' is not empty, then it will route for 'Additional Approval Required' to step 'Additional Review'.
 - If the user is on step Additional Review and field 'Level of Review Required' = Level 5+, then it will route for 'Additional Approval Required' to step 'Additional Review'.
- d. **'Reviewer Decision' field = 'Update Change Impacts'** then the form is routed to step **'Review & Coordination.'**
- e. **'Reviewer Decision' field = 'Reject/Cancel'** then the form is routed to terminal end.

4. Click **Send**.

The screenshot shows a software interface with a top bar containing three buttons: 'Save Draft', 'More Actions' (with a dropdown arrow), and 'Send' (highlighted with a red box). Below the top bar is a section with four tabs: 'Attachments', 'Comments', 'Linked Records', and 'Linked Mail'. The 'Attachments' tab is active, displaying a paperclip icon and a dropdown arrow. To the left of the tabs is a large, empty rectangular area, likely for a document preview or image.

- c. Under **Action Details> Workflow Actions**, Select **Submit**



Workflow Action Details ✕

✓ **Action Details**

Workflow Actions *

Submit ▼

Send For
Level 1 Review

To
Company Administrator

CC

Hariharanath Maganti- Partner Contractor ✕

✓ **Due Date Details**

Task Due Date

Task Due Date is not available

Cancel

Send

- d. Click **Send**.



Workflow Action Details

▼ Action Details

Workflow Actions *
Submit
Send For
Level 1 Review
To
Company Administrator
CC
Hariharanath Maganti- Partner Contractor X

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

2.19 Implement Change of Change Request

User Role(s): Implementers (Project Controls – Cost, Project Controls – Schedule)

```
graph LR; Create[Create] --> Responsible[Responsible Lead Response]; Responsible <--> ContractorRevision[Contractor Revision]; Responsible --> Review[Review & Coordination]; Request[Request Internal Input] --> Review; Review <--> ContractorApproval[Contractor Approval]; Review <--> ContractorResponse[Contractor Response]; Review --> MultiLevel[Multi Level Reviews]; Review --> Implement[Implement Change]; MultiLevel --> Implement; Implement --> SiteTeam[Site Team Completion]; SiteTeam --> Close[Close]; Review --> Close; ContractorApproval --> Close; ContractorResponse --> Close; MultiLevel --> Close; Implement --> Close; SiteTeam --> Close;
```

The flowchart illustrates the process for implementing a change of change request. It begins with a 'Create' button leading to 'Responsible Lead Response'. This step is linked to 'Contractor Revision' and leads to 'Review & Coordination'. 'Request Internal Input' also feeds into 'Review & Coordination'. From 'Review & Coordination', the process can move to 'Contractor Approval', 'Contractor Response', 'Multi Level Reviews', or 'Implement Change'. 'Contractor Approval' and 'Contractor Response' are linked to 'Review & Coordination'. 'Multi Level Reviews' and 'Implement Change' are linked to each other. 'Implement Change' leads to 'Site Team Completion', which then leads to 'Close'. Finally, 'Review & Coordination', 'Contractor Approval', 'Contractor Response', 'Multi Level Reviews', 'Implement Change', and 'Site Team Completion' all lead to the 'Close' step.

1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task Log** will show available records.
 - b. Double-click the **Change Order** record to be responded.**(Note:** Partner User will also receive an email with a link of the record to click on)

94



☰ Tasks

🔔 Notifications

📄 Drafts

🔒 Shell Access Request

📁 Document Manager >

Tasks

+

Create

Actions

▼

View: All Tasks

▼

✎

↺

🖨

▼

🔍

☰

🕒	👤	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
🕒	👤	Project_Demo_TSS	Change Order	CO-00061	change request	09/27/2024 05:00 ...	Company Adminis...	Implement Change	
🕒	👤	Project_Demo_TSS	Project Change Re...	PCR-00016	Test	05/17/2024 04:10 ...	Esha Jain - Change...	Implement Change	
🕒	👤	Project_Demo_TSS	Project Change Re...	PCR-00015	Sample	05/17/2024 02:39 ...	Company Adminis...	Implement Change	
🕒	👤	Project_Demo_TSS	Change Order	CO-00004	Test		Rashmi Singh-Proj...	Implement Change	



Save Draft

More Actions ▾

Send

Attachments

Comments

Linked Records

Linked Mail

> []

- Under **Action Details> Workflow Actions**, Select **Submit**
- To:** In this field, click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select. The name can be searched using the Select function.

Workflow Action Details

×

▼ Action Details

Workflow Actions *

Submit ▾

Send For
Site Team Completion

To

Start typing for suggestions...

☒

CC

Start typing for suggestions...

☒

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel

Send

- Click **Send**.



Workflow Action Details X

✓ **Action Details**

Workflow Actions * Send For

Submit Site Team Completion

To Start typing for suggestions...

CC Start typing for suggestions...

✓ **Due Date Details**

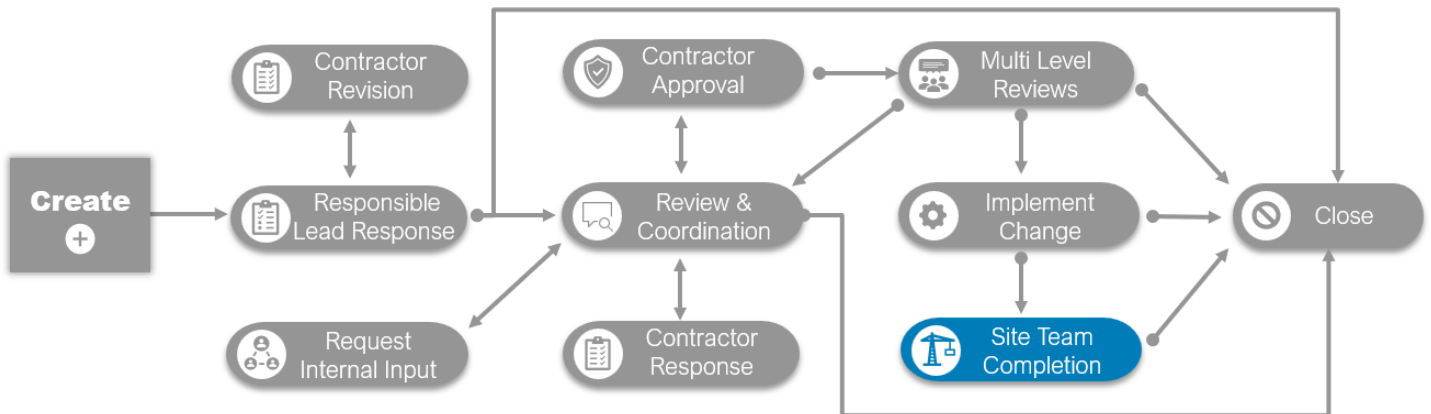
Task Due Date

Task Due Date is not available

Cancel **Send**

2.20 Site Team Completion of Change Request

User Role(s): Site Team (Construction Team)



1. In the left Navigator, click the **Tasks** option in the Navigator
 - a. The **Task Log** will show available records.
 - b. Double-click the **Change Order** record to be responded.

(**Note:** Partner User will also receive an email with a link of the record to click on)



Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

Create

Actions

View: All Tasks

	Origin	Business Process	Record Number	Title	Record Due	From	Sent for
	Project_Demo_TSS	Change Order	CO-00061	change request	09/27/2024 02:00 ...	Chalukya Manivan...	Site Team Completion
	Project_Demo_TSS	Change Order	CO-00046	Test 1 Aug	08/09/2024 05:00 ...	Company Adminis...	Site Team Completion
	Project_Demo_TSS	Change Order	CO-00045	R575	06/14/2024 05:00 ...	Chalukya Manivan...	Site Team Completion
	Project_Demo_TSS	Change Order	CO-00027	Test		Hariharanath Mag...	Responsible Lead Respo...



Workflow Action Details ✕

▼ Action Details

Workflow Actions *

Submit ▼

Send For
End

CC

Start typing for suggestions... ☑

Cancel

Send

b. Click **Send**.

Workflow Action Details ✕

▼ Action Details

Workflow Actions *

Submit ▼

Send For
End

CC

Start typing for suggestions... ☑

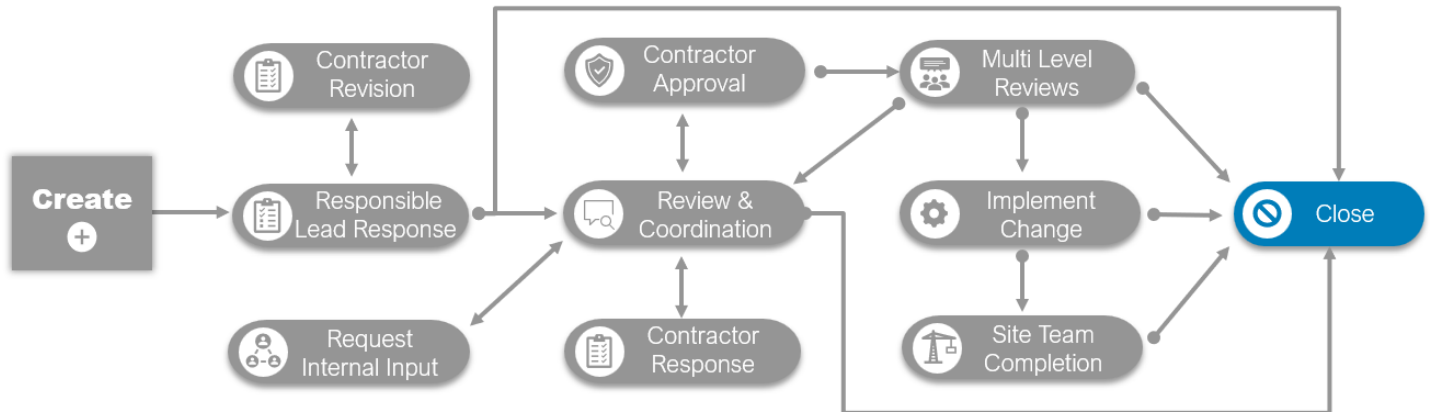
Cancel

Send



2.21 Closure of Change Request

User Role(s): NA



1. Change Order Record has now reached to the terminal end by below ways:
 - a. Completion of the Change Order Request record
 - b. Rejection or cancellation of Change Order Request record



2.22 Related Business Processes

In the Change Order business process, several related objects and business processes play crucial roles in ensuring smooth operations and integration across various project functions. These related objects help streamline the initiation and management of Change Orders by providing necessary data and facilitating communication between different stakeholders. Understanding these relationships enhances the overall efficiency and effectiveness of managing changes in project scope, costs, and timelines.

Workflow Step	Summary
Project Change Request	The Project Change Request allows users to create a Change Order by referencing a PCR record. When a PCR is identified, users can initiate a Change Order to address any contractual impacts, ensuring that changes are accurately documented and approved.
Design Change Notice	A Design Change Notice can be linked to a Change Order to reflect design modifications that impact the project scope. Users can reference a Design Change Notice when creating a Change Order to ensure all design-related changes are captured and processed.
Non-Conformance Report	A Non-Conformance Report can trigger a Change Order by highlighting discrepancies that require corrective actions. By referencing a Non-Conformance Report, users can create a Change Order to address non-conformances and implement necessary changes to align with project standards.
Request for Information	When a Request for Information (RFI) reveals changes needed in the project, users can create a Change Order linked to the RFI. This connection ensures that all inquiries and responses that impact on the project scope are formally addressed and incorporated into the project plan.
Issues	Identified project issues that require changes to the project scope can be documented in a Change Order. By linking issues to Change Orders, users can systematically address and resolve challenges, ensuring all necessary adjustments are made to the project plan.
Purchase Orders	Purchase Orders associated with project changes can be included in a Change Order to reflect cost and procurement adjustments. This integration ensures that all financial and contractual implications of changes are accounted for and managed effectively.
Risks	Risk references are present in change order. Users can manually select risk in the change order form. This connection allows address risks effectively during change.
Correspondence	Correspondence references are present in change order. Users can manually select correspondence in the change order form. For example, correspondence could be generated to notify stakeholders about pending change orders.

2.23 BP & Document Manager

This business process is designed to automatically publish its records, along with comments and attachments, to the Document Manager at the **Project Shell only**. This produces a detailed audit trail of the recorded information through the business process (*for both workflow and non-workflow processes*). Users can open these records and their information by following the steps below.

1. In the left **Navigator**, click **Document Manager**
2. Click **Documents**
3. In the central pane, navigate to the following folder:
 - a. **Phase 5 - Monitoring & Controlling Phase > Change Management**



Document Manager

Documents

Recycle Bin

Unpublished Document...

Information

Project Planning and Initia...

Documents

Home > Project Documents > Phase 5 - Monitoring & Controlling Phase

Create Actions View: All

Name	Upload By	Upload Date	Location
Action Items			/Phase 5 - Monitoring & Controlling P
Assessments			/Phase 5 - Monitoring & Controlling P
Change Management			/Phase 5 - Monitoring & Controlling
Compliance			/Phase 5 - Monitoring & Controlling P

b. Change Management > Change Order

Documents

Home > Project Documents > Phase 5 - Monitoring & Controlling Phase > Change Management

Create Actions View: All

Name	Upload By	Upload Date	Location
Change Order			/Phase 5 - Monitoring & Controlling Pha
Design Change Notice			/Phase 5 - Monitoring & Controlling Pha
Project Change Request			/Phase 5 - Monitoring & Controlling Pha

Properties Audit Log Perr

Name *

Change Order

Location

/Phase 5 - Monitoring &

4. The generated .pdf workflow document will be named in the format **WF_Record Number_Record Title** where “WF” is the BP workflow name, the “Record Number” is the Unifier-generated record number, and the “Record Title” is the title of the workflow record.

Home > Project Documents > Phase 5 - Monitoring & Controlling Phase > Change Management > Change Order

Create Actions View: All

Name	Upload By	Upload Date	Location	BP	Document L
Change Order_CO-00002_Tes...	Sakshi Awasthi - Constr...	04/03/2024 01:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-ur
Change Order_CO-00003_Tes...	Sakshi Awasthi - Constr...	04/03/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-ur
Change Order_CO-00005_Tes...	Sakshi Awasthi - Constr...	04/04/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-ur
Change Order_CO-00006_Tes...	Sakshi Awasthi - Constr...	04/04/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-ur

Any files that were attached to the workflow will include the **paper clip icon** in the “BP” column, if a the file is uploaded directly to the displayed Document Manager folder; it will not show the paper clip icon in the “BP” column.

Documents

Home > Project Documents > Phase 5 - Monitoring & Controlling Phase > Change Management > Change Order

Create Actions View: All

Name	Upload By	Upload Date	Location	BP	Doc
Change Order_CO-00003_Test.pdf	Sakshi Awasthi - Constr...	04/03/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...		http
Change Order_CO-00005_Test.pdf	Sakshi Awasthi - Constr...	04/04/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...		http
Change Order_CO-00006_Test.pdf	Sakshi Awasthi - Constr...	04/04/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...		http



Users may sort the list of files at any level within the Document Manager folders by clicking on the column label. An indicator will be displayed on the right side of the sorted column. Re-clicking on a sorted column will re-sort the list in the opposite sort order (i.e., ascending to descending or descending to ascending).

> Project Documents > Phase 5 - Monitoring & Controlling Phase > Change Management > Change Order

Create ▾ Actions ▾ View: (Modified) All ▾

Name	Upload By	Upload Date	Location	BP	Doc
Change Order_CO-00018_Test.pdf	▲ Sort Ascending	/10/2024 01:...	/Phase 5 - Monitoring & Controlling Phase...		http ▲
Change Order_CO-00029_Test.pdf	▼ Sort Descending	/24/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...		http
Change Order_CO-00002_Test.pdf		/03/2024 01:...	/Phase 5 - Monitoring & Controlling Phase...		http
Change Order_CO-00003_Test.pdf		/03/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...		http
Change Order_CO-00005_Test.pdf		/04/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...		http
Change Order_CO-00006_Test.pdf		/04/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...		http

2.24 Link to Cost Sheet

The Cost Sheet serves as a centralized financial overview for the project, consolidating data from various cost business processes. Each business process contributes specific financial details to corresponding columns in the Cost Sheet, providing a comprehensive view of project costs.

Business Process	Columns in Cost Sheet	Formula
Change Order	Potential Changes (CO)	n/a
Changes Order	Approved Changes (CO)	n/a
Change Order	Completed Changes (CO)	Change Order (Complete) + Change Order (Complete_Reporting)



Cost Sheet

View: (Modified) Default

Currency: United States

	Cost Code	CBS Item	Potential Changes (CO)	Approved Changes (CO)	Completed Changes (CO)
1	P1-_-	GAS Project 1 (AGL P...	\$100.00	\$100,000.00	\$3,500,000.00
2	P1.10-_-	Engineering	\$100.00	\$100,000.00	\$0.00
3	P1.10-_-	Engineering	\$100.00	\$100,000.00	\$0.00
4	P1.10.02-_-	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
5	P1.10.02-_-A.3	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
6	P1.10.02-_-	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
7	P1.10.02-_-S...	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
8	P1.10.02-_-	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
9	P1.10.02-_-S...	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
10	P1.10.02-_-	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
11	P1.10.02-_-S...	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
12	P1.10.02-_-	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
13	P1.10.02-_-S...	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
14	P1.10.02-_-	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
15	P1.10.02-_-S...	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
16	P1.10.02-_-	Engineering - Feasibility	\$0.00	\$0.00	\$0.00
17	P1.10.03-_-	Engineering - Concept...	\$0.00	\$0.00	\$0.00
18	P1.10.03-_-	Engineering - Conceptual	\$0.00	\$0.00	\$0.00
19	P1.10.03-_-S...	Engineering - Concept...	\$0.00	\$0.00	\$0.00
20	P1.10.03-_-	Engineering - Conceptual	\$0.00	\$0.00	\$0.00



3. Business Unit Guidance

This user guide offers baseline instructions. For localized guidance, users should visit their respective business unit portals (accessible via the link below).

[EPPM Training Homepage](#)



4. Appendix

4.1 Getting Help & Support

If you encounter any issues or require assistance, there are two primary channels available:

Business Unit Administrator	IT Support
For process-related inquiries or issues, users can reach out to the designated Business Unit Administrator. They are equipped to provide guidance and support specific to the business process within Oracle Unifier.	For technical issues or challenges beyond the scope of the Business Unit Administrator's expertise, users can contact IT Support. They can assist with platform-related technical difficulties, account access problems, or any other IT-related concerns.

4.2 Glossary of Terms

Here are some clear definitions for key concepts and terminology essential for navigating Oracle Unifier.

SC Owner Initiation	WF allows Southern Company Users to create and track Change Orders. They will not be able to create using WF02.
Contractor Owner Initiation	WF allows Partner Users to create and track Change Orders. They will not be able to create using WF01.
Role Definitions	Each Unifier user will be assigned a role relating to the work they will perform during a project.

4.3 Abbreviations and Acronyms

Here, you will find a handy reference list of commonly used abbreviations and acronyms throughout your Oracle Unifier experience.

PCR	Project Change Request
DCN	Design Change Notice
RFI	Request for Information
NCR	Non-conformance Report
BP	Business Process
WF	Workflow
PO	Purchase Order
CBS	Cost Breakdown Structure
SoCo	Southern Company
SC	Southern Company



4.4 Frequently Asked Questions

1. What is a Change Order (CO) in Oracle Unifier?

A Change Order (CO) is a formal request to modify the original terms of a project. It allows stakeholders (both internal SC employees and partner contractors) to manage changes in scope, cost, or schedule. The CO process ensures transparency, accountability, and agreement among all parties involved.

2. How many workflows are there in Change Order BP?

There are two workflows available in Change Order BP.

- a. WF1: Change Order Notice - SC Owner Change Order
- b. WF2: Change Order Request - Partner Owner Change Order

3. Site Team Completion is applicable to which Organization?

Site Team Completion is only applicable to **TSS**.

4. Where can a PDF copy of the published document of CO record be in Document Manager?

CO documentation is auto published to the following folder in the Document Manager: Phase 5 - Monitoring & Controlling Phase > Change Management > Change Order

5. How can I track the status of a Change Order?

You can track the status of a Change Order by accessing the Change Order log in Oracle Unifier. The log provides real-time updates on the status, including whether the Change Order is pending, approved, or rejected.