University of Illinois System

Construction Change Order Training Document

Presented by: OnIndus

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Overview

Construction Change Orders will mostly be processed and auto created from the Issues Application (RFPs). But the Change Order Application can also be used to create Construction Change Orders for an existing Contract against your available budget.

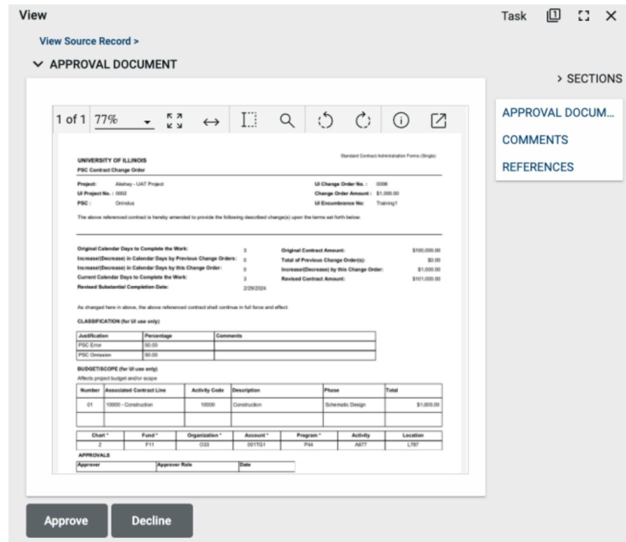
The system will track the Schedule of Values for the Change Order. Cost amounts are tracked in Work Breakdown according to status.

To access the Expense Change Order application, please open the Apps repository. Under the Cost Management suite of applications click on Expenses.
This will launch the Expenses Applications which will include:

- Contracts
- Change Requests
- **Change Orders**
- Pay Requests
- Purchase Orders
- Purchase Order Change Orders
- Invoices

Change Order created from Issue

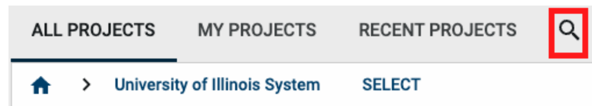
1. When an Change Order Type Issue is approved and it has a Cost or Schedule Impact, Change Orders(s) will be created
2. The number of Change Orders will depend on the number of Impacted Contracts that have a Cost and Schedule Impact
3. Once the Issue has been processed into Change Orders a Task and an Email will be sent to the Financial Manager for review and approval
4. When the Financial Manager opens the Task they will see a screen similar to the image outlining all the details for the impacted contract



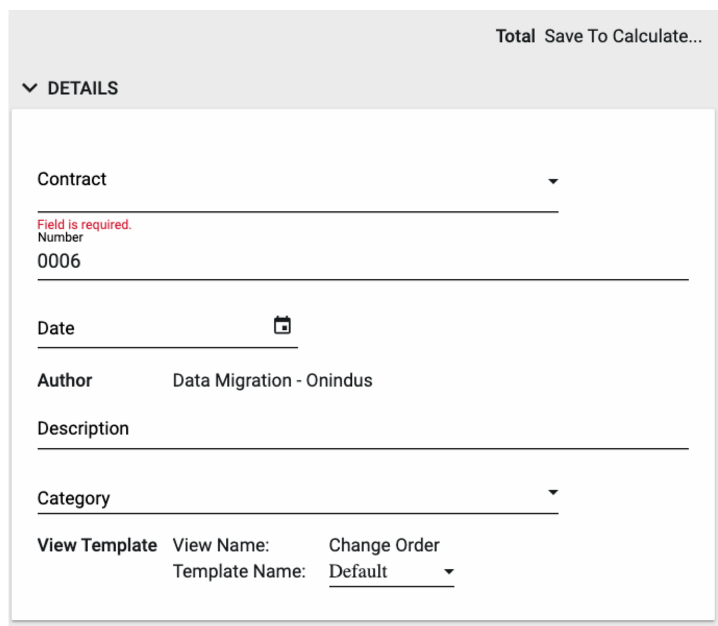
    a. **<u>Note</u>**: If there are multiple impacted contracts then multiple change orders will be created and sent to the Financial Manager for Approval
5. When the Financial Manager clicks Approve, the Change Order will be Approved
6. If the Financial Manager clicks Approve and receives a message saying there is not enough Budget to support the Change Order, please go ahead and click Decline
7. This will send a Message and a Notification to the Project Manager selected in the Project Details
8. The Project Manager can then created a Budget Adjustment or Budget Change to ensure the Budget supports the Change Order
    a. **<u>Note</u>**: Please refer to the Budget Adjustment or Budget Change Training guide on the process
9. Once the Budget Supports the Change Order, the Project Manager can navigate to the Change Order that was declined and then resend it to the Financial Manager for approval by clicking on the Send for Approval button

Create a Construction Change Order

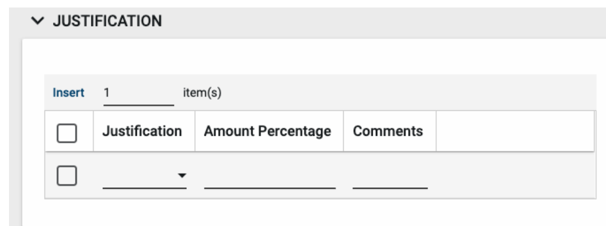
1. To create a new Construction Change Order, please navigate to the appropriate project and go to the Expense Application
2. To do this please navigate using the Project Finder by:
    a. Clicking on Project Finder in the left side Navigation
    b. Selecting the the Project where the Contract was created
3. You can also use the Search functionality in the Project Finder to locate you project by:
    a. Clicking on Project Finder in the left side Navigation



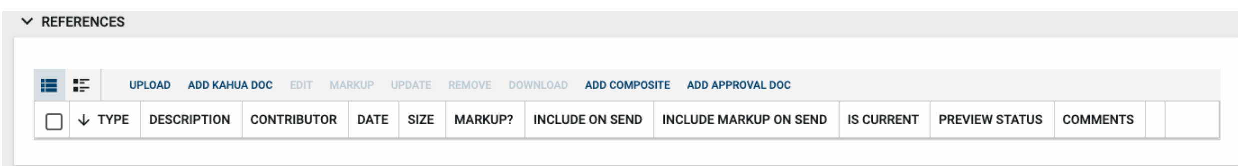
    b. Clicking on the Magnifying Glass icon next to Recent Projects, as shown in the image below
    c. Type out the Project Name and click on the Project
4. Once in the project go to the Expense Application by click on Applications and then searching for Expenses using the Search Bar
5. Select the **Change Orders** tab, then click the **New** button to open a new Change Order
6. Notice a new form on the right side of the screen
7. Select the Contract that the Construction Change Order needs to be created against
8. Populate the Details such as Date, Description and Category
9. In the Scope section please enter the Extension Days and any other relevant information in the Scope of Work & Notes fields
10. In the Dates Section please enter Revised Substantial Completion Date



11. To add Change Order line items, navigate to the Items grid
    a. To add multiple line items, determine how many lines you will need and click Insert
    b. Select the Associated Contract Line and fill out the remaining details regarding this record.
12. To view the Change Order Items in further detail, click the more details icon next to the Item number
    a. This view allows for additional detail on the item such as the Scope of Work, Notes, and additional Comments
    b. Use the Previous and Next action buttons to sort through the Items if needed
13. Click Done once details have been added
14. In the next section you can add the Justification for the Change Order along with the Amount Percentage and Comments



    a. **Note**: The Justification Amount Percentage has to Total to 100 across the lines added
15. Documents can be attached to the record under the References section. The user can either:



    a. Upload a document saved on their computer
    b. Add Kahua Doc to reference a document that is stored within Kahua's File Manager application
    c. Add Approval Doc which is used anytime a record is being routed for Review or Signature.
16. Once all details have been filled out, click Save/Close and then please click on **Submit for Signature**

Change Order Action Buttons

Once the fields within the record have been completed and saved, the users can select from several actions:

- **Send** – Use messaging to send record details to others (NOT to be confused with a workflow)
- **Edit** – Update and maintain the record
- **Delete** – Select this action button to delete a record (typically permission based, so all may not see this)
- **History** – All updates/changes are tracked
- **Import Issue Items** - It will import existing Issue Items from the Issues Application

Send

- Do not confuse **Send** with using the workflow buttons in any application
- Documents can be sent via a message within Kahua to either existing Kahua users or users outside of Kahua by entering their email address and clicking **Enter**
- The documents are treated as attachments, and the message can be copied to the **Communications** application by checking the box

Edit

- The record can be updated as needed during the process
- If the document is out for Review or Signature, **Edit** will not be available

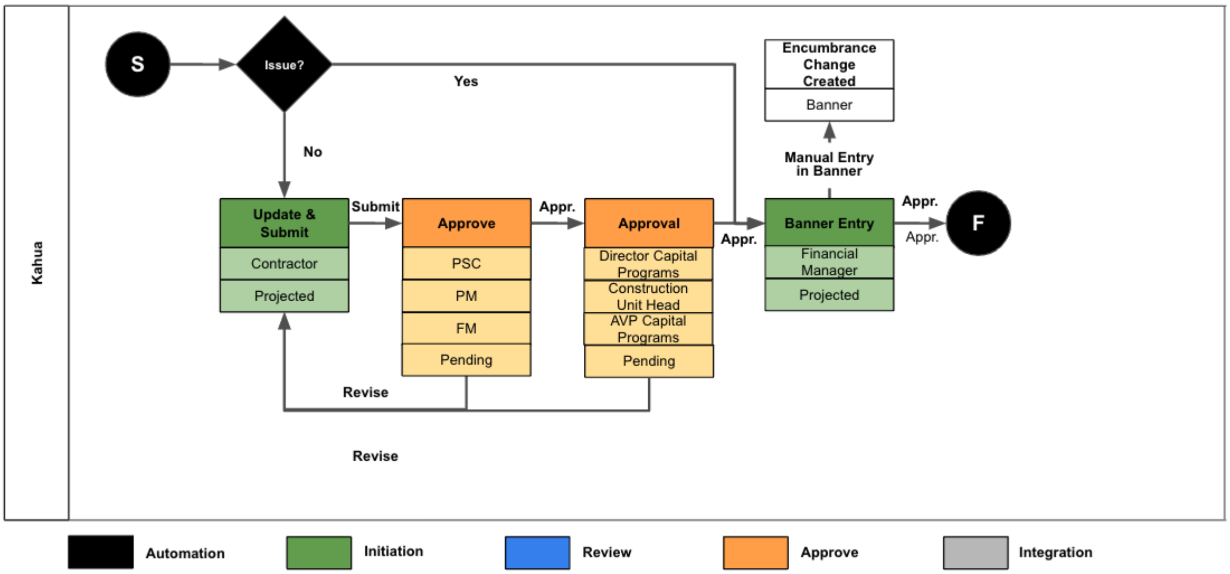
View

- Records can be viewed as a Portable View in which a PDF version of the data is generated and can be printed out. Select the **PDF Icon** to generate a printable PDF version of the document

History

- The **History** action button provides details regarding all activity (Creation, Updates, Saves, etc.) performed on the record
- To see specific details related to the updates made, click the View Edit button

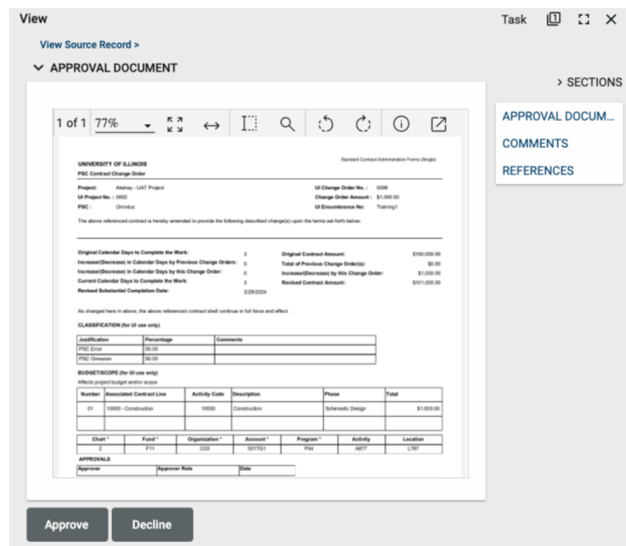
Workflow



Order	Role Type (Name or Actor)	Approval Threshold	Approval Limit
1	Change Order Author	None	None
2	PSC	None	None
3	Project Manager	None	None
4	Financial Manager	None	None
5	University Director Capital Programs	None	None
6	University Construction Unit Head	> $75,000	None
7	Assistant Vice President of Capital Programs & Utility Services	≥ $100,000	None
8	Financial Manager	None	Unlimited

Send a Construction Change Order for Approval

1. The Threshold Based Approval process begins with the Submit for Signature Button has been clicked
2. Once the Author/Creator of the Construction Change Order clicks on the Submit for Signature button the approval process is initiated
3. The Construction Change Order will first be sent to the Author/Creator for their Approval for the Audit Trail
4. The Author/Creator will receive an email in their inbox as well as a Task & Notification in Kahua
    a. The Task can be accessed by clicking on the Task icon located at the Top Right corner of Kahua
5. Once the Task is opened the Author/Creator will see a screen similar to the Image on the right
    a. From the 2nd Approver onwards they will see another option to Revert to the Prior Approver
    b. This option can be used to clarify any doubts that could be answered by the previous Approver



6. When the Author/Creator clicks on Approve it will be sent to the PSC for Approval
7. The Construction Change Order process will following a Threshold Based Approval as outlined on Page-8 in the Approval Workflow Table

When the Construction Change Order is approved the Author/Creator will be notified and they will need to navigate to the Expense SOV application in Project to update the Schedule of Values.

Please Refer to the SOV Guide on the process to update the Schedule of Values

Resources

For additional help with Kahua applications please reach out to the Technical team of the University with any questions

Submit a Support Request or email at servicedeskaits@uillinois.edu

UIC: (312) 996-4806

UIS and UIUC: (217) 333-3102