



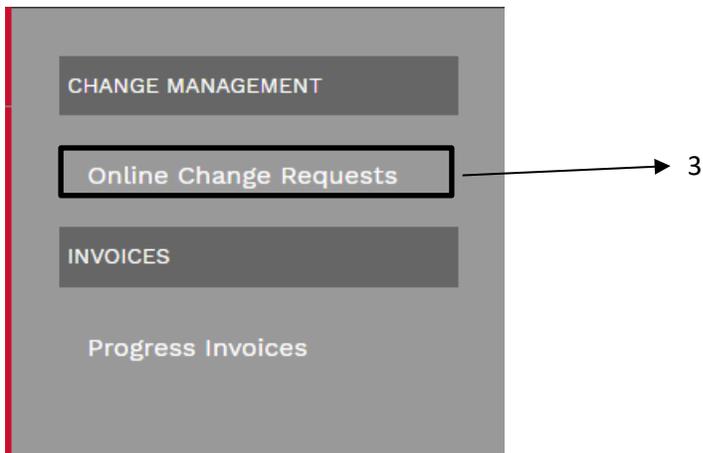
Vendor

Submitting Online Change Request

- 1- For PAEA, PCCEA, PDCA, PPCO and PGMP, complete the appropriate worksheet template per the instructions provided on the first tab of the worksheet. Templates available at the UH FPC [Vendor Resources page](#).
- 2- Click on **Cost Management**



- 3- Click on **Online Change Requests**.



- 4- Click on the **+Add**  button.

- 5- **Company field** – Your Company will auto select based on your user id.
- 6- **Project field** - Select the project from the Project drop down menu.
- 7- **Commitment field** - On the Commitment drop down menu, select the contract for your company.
- 8- **Description field** - Enter a summary of the proposed change.
- 9- **Record # field** – Enter an appropriate reference that serves as a tracking number, i.e. PCCEA 3, PCO 6, PDCA 2.
- 10- **Category field** – From the drop-down menu, select the appropriate category for the request.
- 11- **Post As field** – Leave as ‘Revised Scope’.
- 12- **Scope of Work field** – Enter scope of the work to be performed in this change.
- 13- **Justification of Expense field** – Enter sufficiently detailed information to clearly justify the request.
- 14- From the top bar, click on the **Save** icon.

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The screenshot shows a software interface with a top bar containing several icons. A red box highlights the save icon, which is labeled with the number 14. Below the top bar is a form with the following fields:

- Company: 5
- Project*: 6
- Commitment*: 7
- Description: 8
- Record #*: [Empty]
- Status / Revision: Draft, 0
- Category: 10
- Post As: Revised Scope, 11
- Commitment CO: [Empty]

On the right side of the form, there is a table titled "CHANGE REQUEST RECAP" and a section titled "USER DEFINED FIELDS".

	COSTS	DAYS
Original Value	\$0.00	0
Approved Changes	\$0.00	0
Revised Value	\$0.00	0
This Request	\$0.00	0

USER DEFINED FIELDS:

- Scope of Work: 12
- Justification of Expense: 13

15- A new tab at the bottom will appear.

16- **Important:** Ensure that the 'Use Units' box on the grey bar is not selected.

a. If 'Use Units' is selected (box has a checkmark), click on the box to deselect.

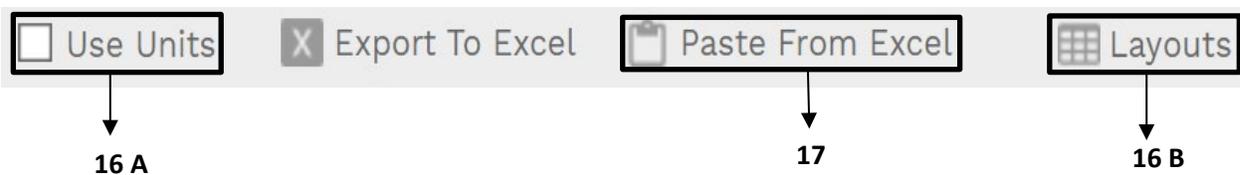
b. To make your default layout, hover over 'Layouts' then select 'Save' from the drop down.

17- Click on **Paste From Excel**. Do not click the **OK** pop up button until after data is copied from the excel file.

18- Go to your worksheet template then select and copy the data in the 'Paste Copy' tab. Do not copy column headers.

19- Click the **OK** pop up button.

20- Hold down the Ctrl button on your keyboard and press V to paste.



21- From the top bar, click on the **Save** icon.

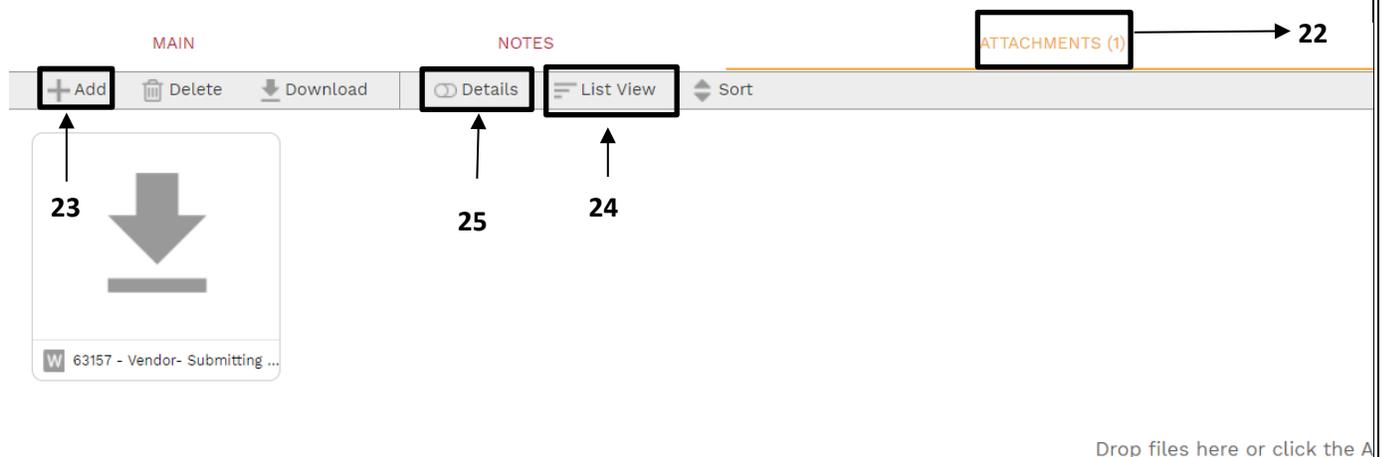


22- Select the **Attachments** tab to add attachments.

23- Add files by drag/dropping or clicking the Add button.

24- Click on **List View** to show attachment details

25- Click on **Details** to show the details for attachments.



- 26-** Review attachment details. Click on the **'Edit'** icon to make edits
- 27-** In the **description field**, provide a brief description of the attachment.
- 28-** Attach the data worksheet as a pdf or as an .xls file.
- 29-** Repeat the process for additional back up files.
- 30-** Click the **Save Icon**.

W 63157 - Vendor- Submitting Online Chang...



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Description*

Vendor- Submitting Online Change Request NLM Review

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Linked Line

Notes

Geolocation

Version 1

Added From Upload

Added 01-02-2023

Added By Vendor - Vendor

ADD COMMENT

- 31-** Review the data in the Change Request Recap data for accuracy. For PAEAs and PCCEAs you should see no change since they are net zero to the contract.

CHANGE REQUEST RECAP

	COSTS	DAYS
Original Value	\$1,140,000.00	0
Approved Changes	\$0.00	0
Revised Value	\$1,140,000.00	0
This Request	\$0.00	0

32- If you identify data errors, select rows with errors and click on the **'Delete'** button. Review data in worksheet then reimport.

Drag a column header and drop it here to group by that column

Edit Selected Lines + Add Add Items **Delete** Refresh Use Units Export To Excel Paste From Excel Layouts

LINE #	ATTACHMENTS	DESCRIPTION	QUANTITY	UNIT COST	EXT. COST	COST CODE	COMMITMENT CHANGE ID	NOT
1	(0)		1.00	\$0.00	\$0.00			

33- Once data is validated, select the **Workflow** tab.

34- Click on the **Submit** button. Review information then click on the **Save** button.

MAIN NOTES ATTACHMENTS **WORKFLOW**

ACTIONS

SUBMIT → 34

— BUSINESS PROCESS

— WORKFLOW LOG

↓ 33

35- Process Complete.

Actions for Returned Online Change Request

- 1- Select the **Workflow** tab at the top navigation bar.
- 2- Scroll down to the *Workflow Log* section and review comments in the *Comments* column.
- 3- Select the '**Attachments**' tab to review any attachments from the Reviewer.

The screenshot shows the 'Workflow Log' section of a software interface. At the top, there is a navigation bar with tabs: 'MAIN', 'NOTES', 'ATTACHMENTS', 'WORKFLOW', and 'NOTIFICATIONS'. The 'WORKFLOW' tab is highlighted with a box and an arrow labeled '1'. Below the navigation bar, there is a 'WORKFLOW LOG' section with a header that says 'Drag a column header and drop it here to group by that column'. Below the header, there are icons for 'Resend Message(s)', 'Refresh', and 'Layouts'. The main table has columns: 'USER', 'ACTION DATE', 'ACTION TIME', 'ACTION', 'DELEGATE', 'TEAM INPUT', 'DOCUMENT VALUE', 'SIGNATURE', and 'COMMENTS'. The 'ATTACHMENTS' tab is highlighted with a box and an arrow labeled '3'. The 'COMMENTS' column for the first row is expanded, showing a comment: 'ASI 05, 06, 07 & 09 addressed the location and elevation of the mechanical yard. Revisions to the structural drawings for the mechanical yard were apart of the package. Revisions to the mechanical yard wall panels.' An arrow labeled '2' points to this comment. The first row of the table contains the following data: USER: Daniel Rueda(dru...), ACTION DATE: 12-08-2021, ACTION TIME: 10:39:50 PM, ACTION: Submit.

USER	ACTION DATE	ACTION TIME	ACTION	DELEGATE	TEAM INPUT	DOCUMENT VALUE	SIGNATURE	COMMENTS
Daniel Rueda(dru...)	12-08-2021	10:39:50 PM	Submit					ASI 05, 06, 07 & 09 addressed the location and elevation of the mechanical yard. Revisions to the structural drawings for the mechanical yard were apart of the package. Revisions to the mechanical yard wall panels.

- 4- If the decision is made to withdraw the request. Under the '**Workflow**' tab, in the Actions box select '**Withdraw**' then click on the **Save** button.
- 5- If the decision is to resubmit - make correction to data and other fields and update attachments as necessary.
- 6- Under the 'Workflow' tab, in the Actions box select 'Resubmit' then click on the Save button.

ACTIONS

RESUBMIT → 6
 RETURN
 REJECT
 WITHDRAW → 4
 FINAL APPROVE
 DELEGATE
 COMMENT