

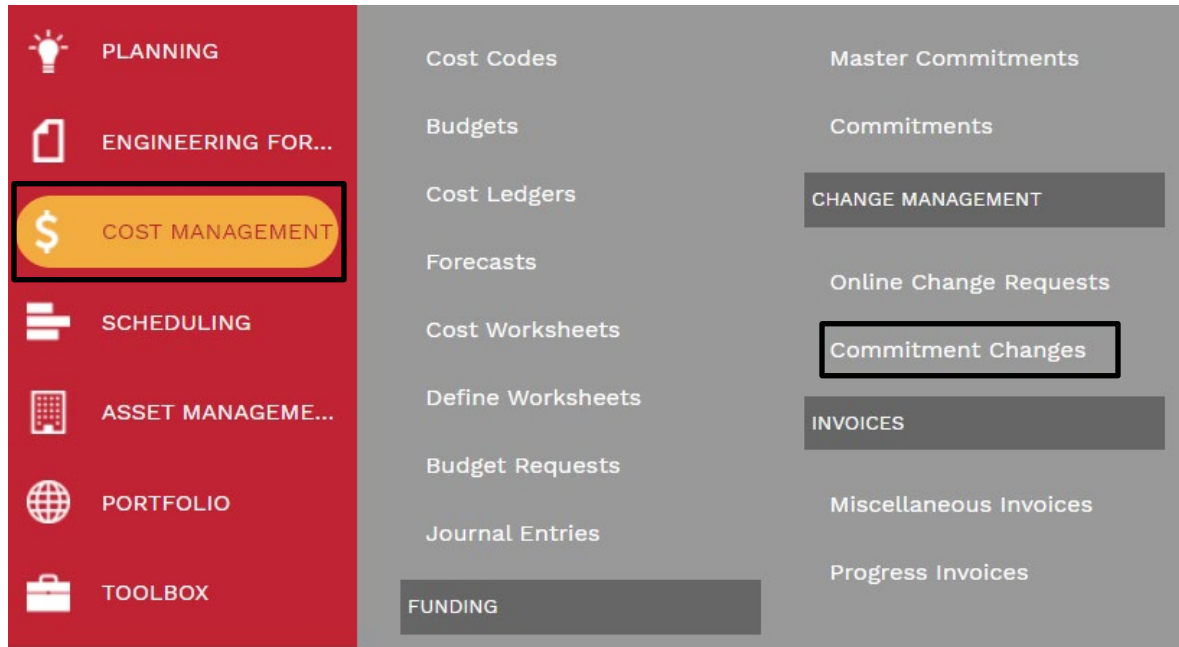


PM & Contracts

Commitment Change Processing

Contract Administrator

1. Access the Commitment Change record by clicking on the link in the notification e-mail, the item in your PMWeb WORKFLOW INBOX or going to **Commitment Changes** under **COST MANAGEMENT**.



2. In the **Lower tab**, review the data entered.
3. Ensure that funds have been allocated under the 'Funding' column.

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

Refresh Export To Excel Layouts

LINE #	ATTACHMENT	CHANGE REQUEST ID	DESCRIPTION	COST CODE	DAYS	AMOUNT REQUESTED	AMOUNT APPROVED	FUNDING	NOTES
1	(0)		Reallocate ext. bldg. assess to A	02-01-001550 - Building Envelop	0.00	\$-8,846.00	\$-8,846.00	\$0.00 ***	Reallocated per PO Contracts
					0.00	\$-8,846.00	\$-8,846.00		

PAGE SIZE 20

3

4. Under the 'UH Fields' tab, select the appropriate change type tab. Review the Scope and Justification provided. Enter data for any additional fields required (ie. 'Change Order Type' field for Change Orders).

MAIN	ADJUSTMENTS	UH FIELDS	NOTES	ATTACHMENTS	WORKFLOW	NOTIFICATIONS
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Additional Services Requisition

Allowance Exp Authorization

Change Order

Construction Contingency Exp Au

Design Change Authorization

Guaranteed Maximum Price

Unilateral Change Order

Signatories

UH FIELD	DATA	NOTES
Scope	Reallocate ext. bldg. assess to Armko	
Justification	Per PO Contracts, WSP CSA did not include ext. bldg. assess, therefore reduce WSP CSA to MEP scope only	

4

4

5. Under the 'UH Fields' tab, select the 'Signatories' tab. Review the Architect and Contractor data. Enter additional names and titles as required based on the type and dollar value of the change.

MAIN	ADJUSTMENTS	UH FIELDS	NOTES	ATTACHMENTS	WORKFLOW	NOTIFICATIONS
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Additional Services Requisition

Allowance Exp Authorization

Change Order

Construction Contingency Exp Au

Design Change Authorization

Guaranteed Maximum Price

Unilateral Change Order

Signatories


UH FIELD	DATA	NOTES
Architect Name		
Architect Title		
Contractor Name		
Contractor Title		
UH Signatory Name		
UH Signatory Title		
Internal Reviewer 1 Name		
Internal Reviewer 1 Title		
Internal Reviewer 2 Name		
Internal Reviewer 2 Title		
Internal Reviewer 3 Name		
Internal Reviewer 3 Title		
OGC Approver Name		
OGC Approver Title		

5

5

6. Select the 'Attachments' tab. Review attachments submitted.

MAIN	ADJUSTMENTS	UH FIELDS	NOTES	ATTACHMENTS (1)
+ Add	Details	List View	Sort	

 19393 - Compressed air CO .

Drop files here or click the Add button

7. If the commitment change is ready for submission, continue, if not ready, skip to step 18.

8. Click on the **Main tab** in the top navigation bar.

9. In the **Date of Issuance** field, enter the date the form was submitted by the submitter.

Project*	M001328 - WOE61588 - 415 UH Technr	Reason Code	
Commitment*	002 - WSP USA BUILDINGS INC - Migrati	Date of Issuance	9
Company	WSP USA BUILDINGS INC	Effective Date	03-15-2022
Record #*	001	Days	0
Description	Migration MEP Feasibility	RECAP	
Post As	Revised Scope		
Status / Revision	Approved		0
Change Request			
Category			

	COSTS	DAYS
Original Commitment A...	\$69,635.00	316
Prior Approved Changes	\$0.00	0
Prior Revised Contract	\$69,635.00	316
Total of This Change	\$-8,846.00	0
Contract to This Change	\$60,789.00	316

10. From the top bar, click on the  icon to save the information entered.

11. On the top bar, click on the drop-down arrow for the Print icon and select BI Reporting from the drop-down list.

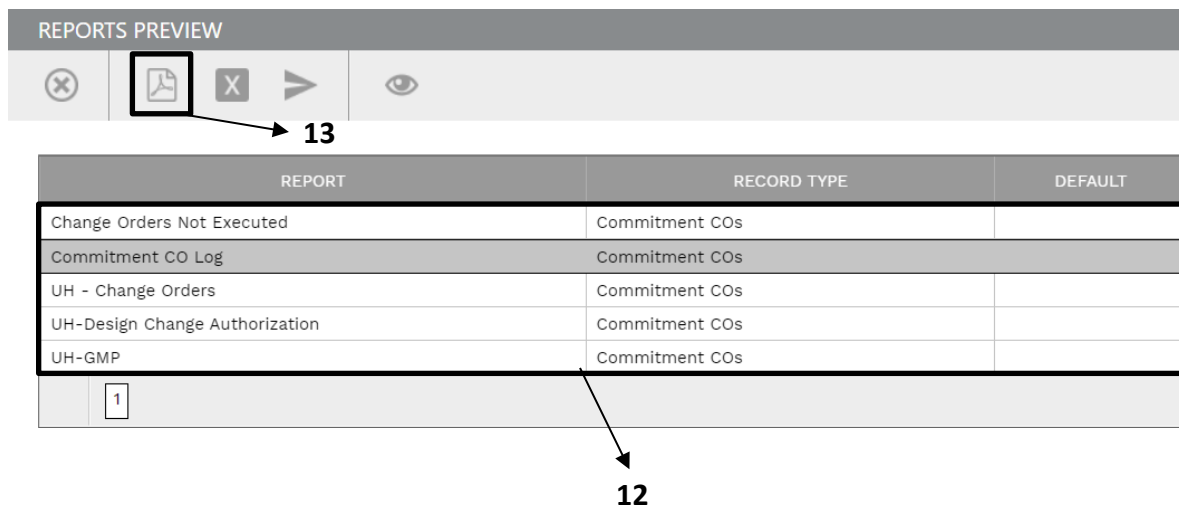


12. Double click the desired UH report to preview.

13. Click on Print Drawing to PDF button.

14. Review the form for accuracy.

15. Save the file using following format for the file name - "[change number] - [project name] - UNSIGNED Changes Form".



16. Under the '**Attachments**' tab, add the created UNSIGNED Changes Form by dragging and dropping the file to the files list.

16

17. Under the "Workflow" tab click on the **Approve** button in the "Actions" box.

18. **OR**, if issues were identified that require resubmission, under the "Workflow" tab click on the **Return** button in the "Actions" box.

19. Click the **Save** button.

18

19

19

20. [If required] The workflow will continue to OGC review if required

21. The change is routed to the submitter to get vendor 'wet' signatures.

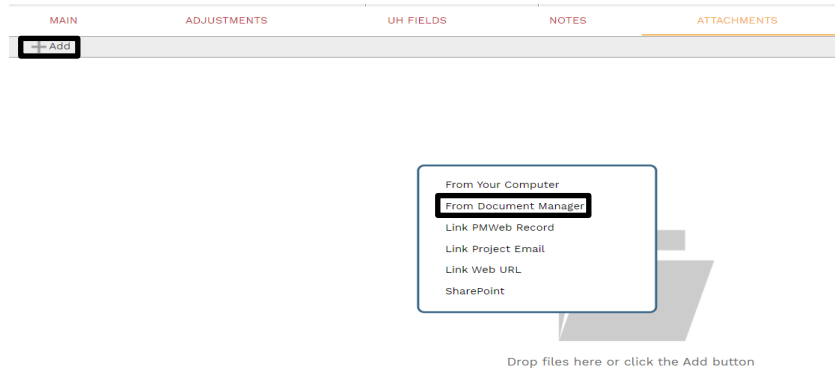
Project Manager

22. Go to the Attachments tab and download the UNSIGNED Changes Form.
23. Print out and circulate the form to get 'wet' signatures from vendors.
24. Once form is signed, save the file as "[change number] - [project name] – VENDOR SIGNED Changes Form".
25. Add the VENDOR SIGNED Form to the Attachments tab.
26. Under the **'Workflow'** tab click on the **Submit** button.

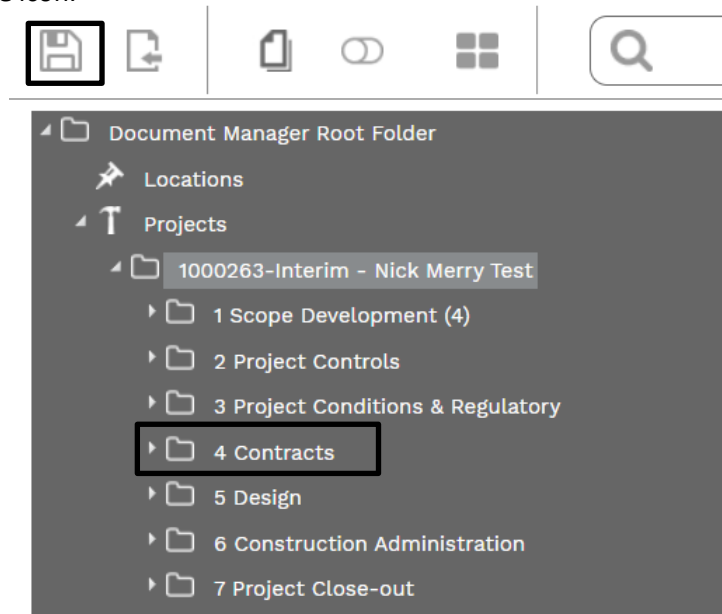
The screenshot displays the Project Manager interface. At the top, there is a horizontal navigation bar with six tabs: MAIN, ADJUSTMENTS, UH FIELDS, NOTES, ATTACHMENTS, and WORKFLOW. The WORKFLOW tab is highlighted with a black border. Below the navigation bar, there is a section labeled 'ACTIONS' with a horizontal line. Under this section, there is a button labeled 'SUBMIT' with a right-pointing arrow icon, which is also highlighted with a black border. Below the 'ACTIONS' section, there are two links: 'BUSINESS PROCESS' and 'WORKFLOW LOG', each preceded by a small horizontal line.

Contracts Coordinator

27. Go to the Attachments tab and download the VENDOR SIGNED Changes Form.
28. Print the Form then route through Adobe Sign for signature.
29. Once form is signed, save the file as “[change number] - [project name] – EXECUTED Changes Form”.
30. Under the ‘**Attachments**’ tab, click on the **+Add** button and select the Document Manager.



31. Select the attached file and in the Notes column add ‘executed form’.
32. Utilize Document Manager to attach the EXECUTED Changes Form in the appropriate Contracts folder.
33. Click on the **Save** icon.



34. Under the MAIN tab, enter the date signed by the binding signatory in the Effective Date field.

The screenshot shows the 'MAIN' tab of a software interface. The 'Effective Date' field is highlighted with a black box, and an arrow points to it from a box labeled '34'. The form contains the following fields:

Field	Value
Project*	1000263-Interim - Nick Merry Test
Commitment*	number here - PMWeb, Inc. - Migration d
Company	PMWeb, Inc.
Record #*	CO-019
Description	Includes PCO 37 for PMWeb 7.3 test
Post As	Revised Scope
Reason Code	Not Applicable
Date of Issuance	01-10-2023
Effective Date	[Highlighted]
Days	3

35. Under the “Workflow” tab at the bottom, click on the **Approve** button in the “Actions” box.

36. Click the **Save** button.

The screenshot shows the 'WORKFLOW (5/9)' tab of a software interface. The 'APPROVE' button is highlighted with a black box, and an arrow points to it from a box labeled '35'. The 'SAVE' button is also highlighted with a black box, and an arrow points to it from a box labeled '36'. The form contains the following fields:

Field	Value
ACTIONS	APPROVE, RETURN, REJECT, WITHDRAW, FINAL APPROVE, DELEGATE, COMMENT
SAVE	[Highlighted]

37. The form then proceeds to Business Services to enter change data into Peoplesoft.

38. Once the Commitment Change is signed by authorized signer, PM will return to Online Change Requests.

39. PM attaches a copy of signed changes form to all included Online Change Requests.

40. In workflow, Final Complete all included Online Change Requests.

The Project Manager may also need to complete a budget realignment using a Budget Request record to ensure adequate funding in applicable cost codes.