
User Reference

Change Management v10x (ADF)

By CMiC

CMiC
Computer Methods
international Corp.

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Change Management

Overview – Change Management

CMiC's Change Management system is the single place of entry for changes to the Job Costing, Job Billing, and Subcontract Management systems, and consequently, the Contract Forecasting systems. External, Internal, Original Budget and Transfer change orders are entered via one screen that allows the user to link Job Costing, Job Billing and Subcontract information all in one transaction.

Prerequisites before Change Management system can be utilized to its fullest extent:

- Accounts Payable module has been setup, including Vendors for Job.
- Job Costing module has been setup, including Job and its JC Budget.
- Job Billing module has been setup, including JB Contract for Job.
- Subcontract Management module has been setup, including Subcontracts for Job.

Integration with other System Modules

For details about the following, please refer to the [PCI Basics – Quick Guide](#) section in this guide.

Job Costing

- Committed Costs from Subcontract Related Change Orders.
- Projected Costs (optional).
- Percent Complete (optional).

Job Billing

- Change Order billing amounts are added to existing contract lines.
- New JB Contract Lines are created if new Bill Codes added via CM.

Subcontracts

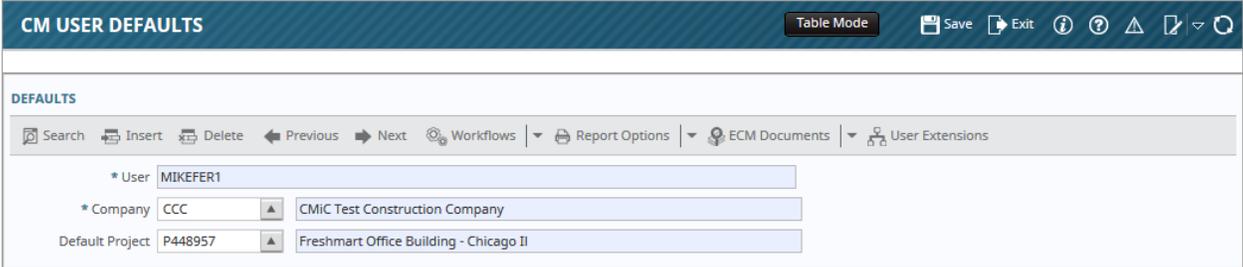
- Subcontracts/Change Orders can be created and/or linked to Change Orders in CM.

Contract Forecasting (Contract Forecasting with PCI Projections, GC Monitor)

- Job Costing & Job Billing changes are reflected in Contract Forecasting systems.

Local Tables

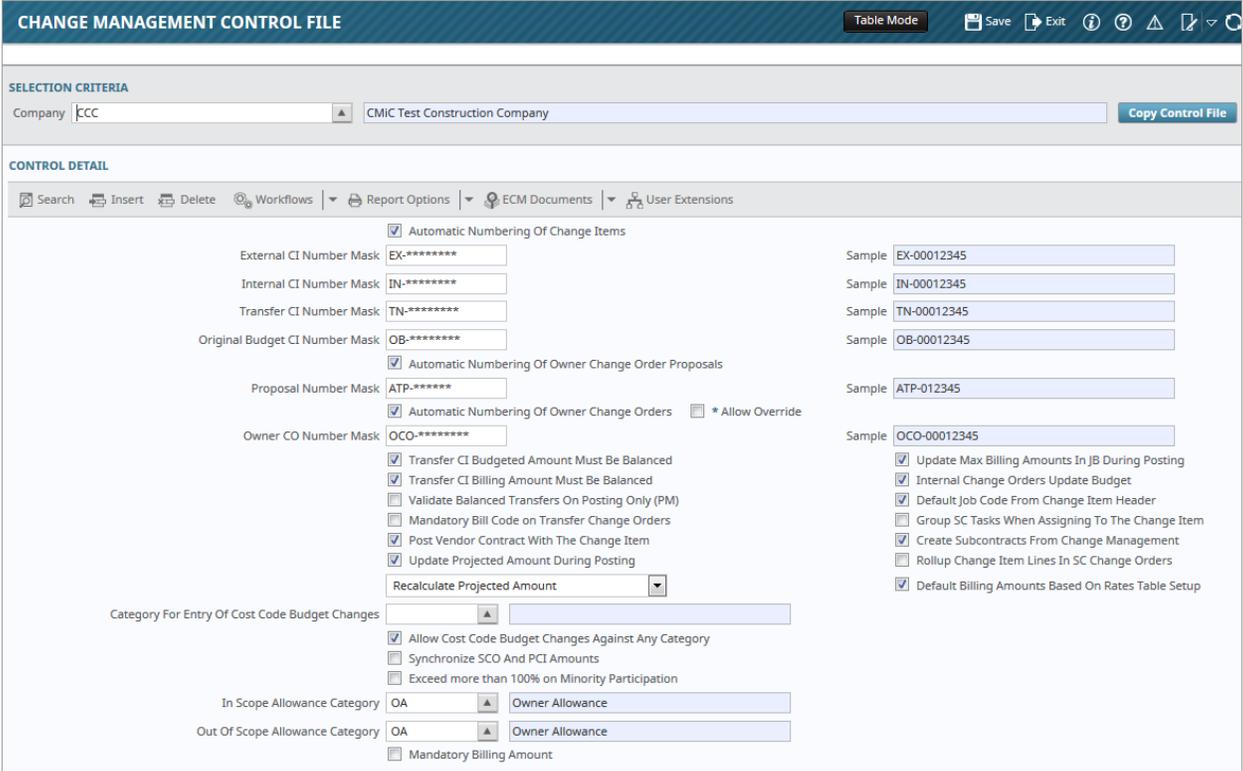
Set User Defaults



Pgm: CMSETFM – Set User Defaults

This screen is used to set the current user’s default Company and Project for this module. These defaults are loaded in the **Selection Criteria** sections of this module’s screens.

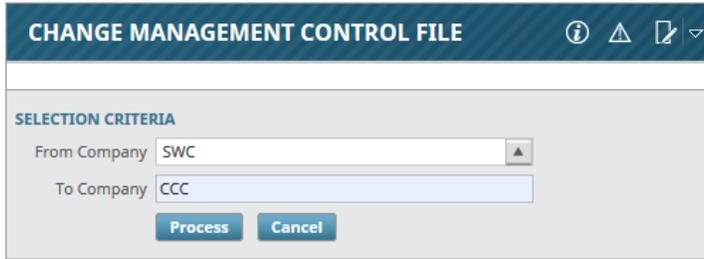
Control (CM Control File)



Pgm: CMCTRLFM – Change Order Control File

This screen is used to configure the Change Management module.

[Copy Control File] – Button



This button’s popup is used to copy the CM Control File from the Company selected via the **From Company** field to the Company selected on the main screen.

Automatic Numbering Of Change Items, Masks (External, Internal, Transfer, Original Budget)

Check the **Automatic Numbering of Change Orders** checkbox to have Change Orders automatically created according to the masks set up for them.

The Change Order masks allow for the customization of the automatic numbering system by allowing you to define the format for the Change Order numbers. The asterisk (*) is used to indicate placeholders for the numbers that are generated sequentially. Any combination of numbers, letters and dashes, along with asterisks, can be used to create a mask.

The system will begin the numbering process from right to left, based on the number of asterisks found in the mask, with any surplus asterisks set to 0. For example if your External Change Order mask is **COE*******, and you are on Change Order number 10, the automatically generated External Change Order number will be **COE0000010**.

The system will default the number mask of **COE******* for External Change Orders, **COI******* for Internal Change Orders and **COT******* for Transfer Change Orders. Change Orders generated through these masks will begin with the prefix COE (or COI or COT depending on the type of Change Order that you are defining) and then generate an 8 character number field to follow.

Change Order numbers are sequential within Jobs. When a Sub-Job is used, the system will continue to increment according to the numbering of the Change Orders within the Controlling Job.

The default mask can be changed at any time. In the table that follows, you will find some examples of Change Order masks, which you may want to consider. Be sure to have an appropriate number of asterisks to handle the maximum number of Change Order generated by your company.

Mask	Explanation	Sample
COE***** (default)	“COE” represents an External Change Order prefix “*****” represents a 6 character numeric string	COE00012345
EC04-*****	“E” represents an External Prefix “C” represents a Change Order prefix “04” represents the year “-” represents the delimitation “*****” represents a 6 character numeric string	EC04-123456

Automatic Numbering Of Owner Change Order Proposals – Checkbox

If checked, numbers for Owner Change Order Proposals are automatically generated according to the mask specified in the **Proposal Number Mask** field.

Proposal Number Mask

If the **Automatic Numbering Of Owner Change Order Proposals** checkbox is checked, this field is enabled to enter the mask for the automatic numbering of Owner Change Order Proposals.

The corresponding **Sample** field to the right displays a generated number sample.

Automatic Numbering Of Owner Change Orders – Checkbox

If checked, numbers for Owner Change Orders are automatically generated according to the mask specified in the **Owner CO Number Mask** field.

Allow Override – Checkbox

If checked, automatically generated Owner Change Order numbers can be changed.

Owner CO Number Mask

If the **Automatic Numbering Of Owner Change Orders** checkbox is checked, this field is enabled to enter the mask for the automatic numbering of Owner Change Orders.

The corresponding **Sample** field to the right displays a generated number sample.

Transfer CI Budgeted Amount Must Be Balanced – Checkbox

Check this box if the total cost amount on a Transfer Change Order must be equal to 0. Leave this box blank if you want to allow the posting of Transfer Change Orders that are not equal to 0.

Transfer CI Billing Amount Must Be Balanced – Checkbox

Check this box if the total billing amount on a Transfer Change Order must be equal to 0. Leave this box blank if you want to allow the posting of Transfer Change Orders that are not equal to 0.

Validate Balanced Transfers on Posting Only (PM) – Checkbox

When checked, an un-balanced Transfer Change Order can be saved, but validation will take place only during the time of posting. It is only applicable to the PM version of Change Orders for Forms and JSP. It works in tandem with the two flags: **Transfer CI Budgeted Amount Must Be Balanced** and **Transfer CI Billing Amount Must Be Balanced**. If either or both flags are checked, then the validation for balancing occurs on the designated field, but it is the state of this checkbox that determines whether the validation occurs at posting time or upon saving.

Mandatory Billcode on Transfer Change Orders – Checkbox

If checked, the Bill Code is required for Transfer type Change Orders. This change affects Potential Change Items in Project Management as well.

Post Vendor Contract with the Change Item – Checkbox

This checkbox's state defaults to the **Post Vendor Contracts with PCI** checkbox on the **General** tab, shown below of new PCIs:

The screenshot displays the 'POTENTIAL CHANGE ITEMS' application interface. The 'SELECTION CRITERIA' section includes fields for Company (CCC), Project (P448957), and Contract (J448957). The 'PCI INFORMATION' section shows * Type (OBC), * PCI NO. (COB0000002), * Status (APPROVED), Total Budgeted (0.00), and Total Billing (0.00). The 'General' tab is active, showing fields for Allowance (Neither), Source, Source Type, Reason, Days Impact, Owner CO#, Due to Owner (03/Aug/2017), * Date (03/Aug/2017), Start Date, End Date, and Post Date. A red box highlights the 'Post Vendor Contracts with PCI' checkbox, which is checked. Other options include 'Proceed', 'Forecast', 'Update Projected Amount during Posting', and 'Recalculate Projected Amount'.

This default can be changed on a transaction by transaction basis. Check this box if, as the default, the Subcontract should be posted at the same time as the Change Order.

Leave this box blank to post the related Subcontract separately.

Update Projected Amount During Posting – Checkbox & Drop-Down List

The box's state depends on whether or not projections are entered via JC on a regular basis, and on how pending and pre-pending Change Orders are to be managed.

Check this box if the default for Change Orders is to update the Job Projected Amount each time a Change Order is posted.

If Change Orders are already included in the amounts for your projection forecasts, then this box should not be checked.

The drop-down list offers two choices for the calculation:

Add Change Budget Amount: If selected, the Change Order cost budget will be added to the previous projected amount.

Recalculate Projected Amount: If selected, Projected Amount equals the highest of Current Budget (including CO being posted), the Spent To Date or the Previously Projected Amount.

Category for Entry of Cost Code Budget Changes

Change Orders can be entered against a Cost Code in order to effect a change to productivity through a change in the Units Complete. In order for the budget to reflect the change, the increase in the budget must be distributed to one of the Category Codes that make up the Units Complete on the Cost Code. This field represents the default Category Code to which changes in productivity (Change Orders against the Cost Code) will hold the change in the budget. This field is most often represented by the labor category.

Enter the Category Code against which changes to the Cost Code level will be entered on the Change Order.

Leave this field blank if you are not entering Change Orders against Cost Code level Units Complete.

Allow Cost Code Budget Changes Against Any Category – Checkbox

When checked, Cost Code budget changes can be entered for any Category. When un-checked, Cost Code budget changes can only be entered against the Category selected for the **Category for Entry of Cost Code Budget Changes** field.

Synchronize SCO And PCI Amounts – Checkbox

If checked, a Subcontract Change Order's amount is synchronized with its linked PCI's amount. In other words, after a PCI is created, if its corresponding Subcontract Change Order is created with a different amount and linked to the PCI, the PCI's amount will be updated to the new amount.

The box's state defaults to all new Projects created for the Company:

The screenshot shows the 'Project Maintenance' software interface. The 'Project Management Menu' on the left lists various project management tasks. The main area displays the 'Defaults' tab for a project named 'Freshmart Office Building - Chicago II'. The 'Synchronize SCO And PCI Amounts' checkbox is highlighted with a red box. Other visible fields include 'Default Bill To Address', 'Default Delivery Period', 'Default Requestor', 'Default Ship To Address', 'Default Buyer', 'RFI Contact', 'Default Issue Review Period', 'Punchlist Completion Period', 'Use Working Days For OCO Date', 'Submittal Contact', 'Schedule', 'Meeting Footnote', 'Default Meeting ID Mask', 'Limit CSI code usage by group', 'Auto Calculate Markups', 'Default RFQ Review Period', 'Default Notice Review Period', 'Default RFI Review Period', 'Use Original Contract Amount Override On OCO', 'Submittal Approver', 'Ball in Court Report', 'Default Agenda Item ID Mask', 'Track 'In Scope' and 'Out of Scope' Amounts', 'Project End Date Updateable', and 'Auto Populate Transmittal From Submittal'.

Exceed more than 100% on Minority Participation – Checkbox

By default the flag is un-checked. When checked, the Aggregate % for Minority Participation can surpass 100%, but an individual line should still only allow a maximum of 100%. This change is not applicable to the JSP version.

In Scope Allowance Category, Out Of Scope Allowance Category

These fields are used to provide the ability to enter and track T&M amounts submitted by subcontractors against Allowance type PCI's into any Cost Code/Category designated as that type. The types are "In-scope" and "Out-of-Scope". They both work in exactly the same way, with the exception that Out-of-Scope Allowances have a Bill Code transfer associated with them as well.

For the Out-Of-Scope type, the Contractor Allowance Amount defaults to zero, therefore the Contractor Projected balance will always be written back to the PCI detail line.

These fields are used to indicate the Categories to be used as In Scope and Out of Scope when using Time and Material (T&M) Allowances in PCIs.

These fields are used in conjunction with the **Allowance** and **Owner Allowance Amt** fields on the **General** tab of the Enter PCI screen, and with the [**Allowance Tracking**] button on the **Details** tab of the Enter PCI screen.

Mandatory Billing Amount – Checkbox

If checked, Billing Amount defaults during PCI entry. If unchecked, Billing Amount does not default during PCI entry, and it may be left as null.

Update Max. Billing Amounts in JB During Posting – Checkbox

When checked, all Change Orders that update Job Billing Amounts will also update the Max Billing amounts at all levels...Bill Code, Sub-Job, and contract header and detail lines by the same amount. If there are no maximum amounts on the detail lines or contract then they will not be altered.

Additionally, the system will update all Job Billing Group Maximums, Bill Code Maximums and Contract Maximums by the Revenue Amount on each Bill Code related to the billing/group maximum of the PCI.

Internal Change Orders Update Budget – Checkbox

Check this box if Internal Change Orders are to update the Job's JC Budget when posted, and if they are to impact projected cost forecasts within PMSJP Contract Forecasting.

The setting of this flag depends on whether or not the Job's JC Budget is the Contract Amount (less fee). If this is the case, this box should likely be unchecked.

Default Job Code from Change Order Header – Checkbox

Check this box if the Job Code in the header of the Change Order should default to the individual detail lines in the Change Order Entry screen. If Change Orders are entered against Sub-Jobs, or Controlling Jobs do not allow transactions, then this box should be left unchecked.

Group SC Tasks When Assigning To The Change Order – Checkbox

Check this box if you group Subcontract Tasks when assigning them to a Change Order.

Leave this box blank if Subcontract Tasks are to be identified on a line-by-line basis when assigning them to a Change Order.

Create Subcontract from Change Management – Checkbox

Leave this box blank if Subcontracts are not allowed to be created within the Change Management module.

Rollup Change Item Lines in SC Change Orders – Checkbox

If checked, PCI Detail Lines are summarized by Job/Cost Code/Category/WM when pulled into Subcontract Change Orders.

Default Billing Amounts Based On Rates Table Setup – Checkbox

If checked, for the Cost Method, calculate the default Billing Amounts based on the Billing Rates Table.

PCI Types

* Type	* Name	Class	* PCI Number Mask	Override Flag	Sample
EXT	External Change Orders	External	COE*****	<input type="checkbox"/>	COE0012345
INT	Internal Change Orders	Internal	COI*****	<input type="checkbox"/>	COI012345
OBC	Original Budget Change Orders	Original Budget	COB*****	<input type="checkbox"/>	COB0012345
TFR	Transfer Change Orders	Transfer	COT*****	<input type="checkbox"/>	COT012345

Pgm: CMTYPE – Change Order Types

The Change Order Types Maintenance screen is used to define the type of Change Order that your company will process through the Change Management System. The system provides 4 different classes of Change Orders: **External**, **Internal**, **Original Budget**, and **Transfer**. As you define a Change Order type, you must then associate the type with one of these classes.

For details about these 4 types of Change Orders, please refer to the following section: [PCI Basics – Quick Guide](#).

Type, Name

Enter a code and name for the Change Order Type that you are defining.

Class

Select the appropriate class for the change order type that you are defining. The system provides for three different classes of change orders: External, Internal and Transfer.

PCI Number Mask

Mask used to generate PCI Numbers for Change Orders of this type. For details about creating masks, please refer to the following section: [Control \(CM Control File\)](#).

Override Flag – Checkbox

If checked, the PCI Number automatically generated in the Enter PCI screen can be changed.

PCI Status Codes

MAINTAIN PCI STATUS CODES							
SELECTION CRITERIA							
Company		CCC	CMIC Test Construction Company				
STATUS							
View ▾ Filter Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export ECM Documents User Extensions							
Code	Name	* Pending Type	Name	Proceeding	Forecast	* At Risk	Include In Below The Line
APPROVED	Approved	A ▲	Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CANCELLED	Cancelled	C	Cancelled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PENDING	Pending	P	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PRE-PENDIN	Pre-pending	N	Pre-Pending	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REJECTED	Rejected	R	Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REJECTED2	More Rejected	R	Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Pgm: CMSTATFM – Change Order Status Setup

The Change Order Status screen is used to set up user-defined Status Codes. Each Change Order must be assigned a status, and the manner in which the status has been flagged within this screen determines the way in which it is accounted for within the Job Cost module. In particular, the Job Cost Status Query will represent the Change Orders in a particular format, given the selection of the Pending Type, Proceeding and Forecast options.

Code, Name

Enter a code and name for the Change Order Status.

Pending Type

The Pending Type represents the manner in which the Change Order will be displayed on the budget side of the Job. The system provides for the following types: Pre-Pending, Pending, Approved and Rejected.

Select Pre-Pending to signify that the Change Order has not been approved (and therefore not posted), and that these changes are considered 'Pre-pending'. Changes Orders entered under this status will update the amounts within the 'Pre-Pending' column under the Budget section of the Job Status Query.

Select Pending to signify that the Change Order has not been approved (and therefore not posted), and that these changes are considered 'Pending'. Change Orders entered under this status will update the amounts within the 'Pending' column under the Budget section of the Job Status Query.

Select Approved to signify that the Change Order has been approved. Only Change Orders that have been approved can be posted. Posted Change Orders update the amounts within the "**Internal Change Order and Transfers**" and "**External Change Orders**" posted columns under the Budget section of the Job Status Query. Change Orders that have been approved, but not posted will appear in the Pending columns of the Job Status Query.

Select Rejected to signify that the Change Order has been rejected and should not be included in the calculation of Projected Budget or in the Forecast of Costs.

PCI's with status type "Cancelled" are not available for selection in Subcontracts (using the [**Select PCI's**] button in JSP version) or Subcontract Change Orders.

Proceeding – Checkbox

Check the Proceeding Box to indicate whether work against a Change Order with the status being defined has begun. Change Orders that have a status of "Proceeding" will update amounts within the "Proceeding Projected" column under the Cost section the Job Status Query.

Leave this field blank if work against a Change Order with this status has not yet begun. Change Orders that do not have this flag set will update amounts within the 'Not Proceeding Change Orders' column under the Cost section of the Job Status Query.

NOTE: The "Proceeding Projected" and "Not Proceeding Change Orders" columns will only be updated if you have checked the **Forecast** box in the next field.

Forecast – Checkbox

Check the Forecast Box if the information on a Change Order with this status should be included in the calculation of the cost forecast within the Job Cost Status Query.

NOTE: If you do not check this flag, the Change Order will not appear within the Cost section of the Job Cost Status Query.

At Risk – Checkbox

If checked, Change Orders with this status are included in JC ETC Forecast Risk Amounts.

Include In Below The Line – Checkbox

If checked, Change Orders with this status are included in PCI Billing.

PCI Markup Rules

MAINTAIN PCI MARKUP RULES

Save Exit ? ? ? ? ? ? ? ? ? ?

SELECTION CRITERIA

* Company CCC CMIC Test Construction Company

* Job J448957 Freshmart Office Building - Chicago II

Copy From Job

RULES

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export ECM Documents User Extensions

* Order	Description	* Rounding Rule	* Rounding Method	* Level
1	Overhead 10%	No Rounding	Standard	1
2	Overhead 12% - Materials	No Rounding	Standard	1
3	Profit 8% - ALL	No Rounding	Standard	1

DETAILS

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export ECM Documents User Extensions

Calculate On Job	* Cost Code	* Cat	Allocate To Job	* Cost Code	* Cat	* Budget %	* Billing %
J448957	04 0500	ALL	J448957	04 8888	8888	0	10
J448957	04 0510	ALL	J448957	04 8888	8888	0	10
J448957	04 4000	ALL	J448957	04 8888	8888	0	10

Calculate On Job Freshmart Office Building - Chicago II Allocate To Job Freshmart Office Building - Chicago II

Calculate On Cost Code Masonry Allocate To Cost Code Masonry - Overhead

Calculate On Cat All Values Allocate To Cat Overhead

Pgm: PMMKUPRL – Maintain PCI Markup Rules

Selection Criteria – Section

Company

Company under which markup rules are created.

Job

Job for which markup rules are created.

[Copy From Job] – Button

MAINTAIN PCI MARKUP RULES

Save ? ? ? ? ? ? ? ? ? ?

SELECTION CRITERIA

Job J00130.000 J00130.000

Proceed Cancel

This button's popup is used to copy PCI Markup Rules from the Job selected in this popup's **Job** field to the Job selected on the main screen. Note, only Jobs with assigned PCI Markup Rules are available in the **Job** LOV.

Rules – Section

This section is used to enter the basic information for a PCI Markup Rule, by specifying its description, order, rounding rule and compound level.

For the selected PCI Markup Rule in this section, the **Details** section is used to specify the markup details for the rule.

Order

All generated markup lines are displayed in order, according to their order number set using this field.

Description

Description for PCI Markup Rule.

Rounding Rule

Specifies how the amount is to be rounded.

Rounding Method

Specifies whether the amount is always rounded up or down, or if it rounding using the standard method.

Level

Level at which PCI Markup Rule is compounded in relation to the other rules (e.g. all Level 2 rules are compounded on Level 1 rules).

Details – Section

This section is used to specify the markup details for the rule selected in the **Rules** section.

Calculate On Job

Job for which rule applies.

Cost Code

Cost Code for which rule applies.

Cat

Category for which rule applies.

Allocate To Job

Job to which markup amount(s) is against.

Cost Code

Cost Code to which markup amount(s) is against.

Cat

Category to which markup amount(s) is against.

Budget %

Percentage to increase JC Budget Amount for Bill Code specified by selected Job, Cost Code & Category.

Billing %

Percentage to increase JB Revenue (Contract) Amount for Bill Code specified by selected Job, Cost Code & Category.

Applying PCI Markups to PCIs

When a PCI is created, to apply all applicable PCI Markup Rules, click the [**Calc. Markups**] button on the **Detail** tab of the Enter PCI screen, shown below. Note, the [**Calc. Markups**] button is only enabled for unposted PCIs.

The screenshot shows the 'POTENTIAL CHANGE ITEMS' interface. At the top, there are navigation buttons: 'Table Mode', 'Save', 'Exit', and a help icon. Below this is the 'SELECTION CRITERIA' section with fields for 'Company' (CCC), 'Project' (P448957), and 'Contract' (J448957). A 'Change Item Markup Rules' button is visible. The 'PCI INFORMATION' section includes a toolbar with 'Search', 'Insert', 'Delete', 'Previous', 'Next', 'Workflows', 'Report Options', 'Attachments', 'Notes', 'ECM Documents', and 'User Extensions'. Below the toolbar are buttons for 'Post', 'Owner CO', 'Copy', and 'Modify Type'. Fields for '* Type' (EXT), '* Status' (PENDING), '* PCI NO.' (COE000004), and 'Exterior Stone Wall - Extra Labor' are shown, along with 'Total Budgeted' (0.00) and 'Total Billing' (5,750.00). The 'Detail' tab is active, and the 'Calc. Markups' button is highlighted with a red box. Below the tabs is another toolbar with 'Show Rates', 'Hide Rates', 'Allowance Tracking', 'PCI Participation', 'SCO', and 'Line Notes'. A table with columns: Vendor, Contract, * Job, * Cost Code, * Category, WM, Billing Code, Days Impact, Cost Code Qty, Cost Code WM, Estimated Amount, Quoted Amount, Final Amount, Billing Amount, and Subcontract Change is displayed. The table has two rows of data. At the bottom, there are fields for 'Vendor Name' and 'Cost Code Desc. Masonry - Overhead'.

Vendor	Contract	* Job	* Cost Code	* Category	WM	Billing Code	Days Impact	Cost Code Qty	Cost Code WM	Estimated Amount	Quoted Amount	Final Amount	Billing Amount	Subcontract Change
		J448957	04 8888	8888	NA	J448957.04 88								750.00
		J448957	04 0500	1000	HR	J448957.04 05	2		NA					5,000.00
													5,750.00	

After clicking [**Calc. Markups**], a popup will appear, notifying you of how many markup lines were added:

The alert popup has a title 'alert' and a message: 'Markups generated successfully: 1 inserted/updated row(s)'. There is an 'OK' button at the bottom right.

On the **Detail** tab, the new line(s) for the markup(s) will be displayed:

POTENTIAL CHANGE ITEMS Table Mode Save Exit Print Help ?

SELECTION CRITERIA

Company: CCC
 Project: P448957 Contract: J448957 Change Item Markup Rules

PCI INFORMATION

Search Insert Delete Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type

* Type: EXT * Status: PENDING
 * PCI NO.: COE0000004 Total Budgeted: 0.00 Total Billing: 5,750.00

General **Detail** Summary RFQ Approval Notes Attachment History

Show Rates Hide Rates Calc.Markups Allowance Tracking PCI Participation SCO Line Notes

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export Attachments Notes

Vendor	Contract	* Job	* Cost Code	* Category	WM	Billing Code	Days Impact	Cost Code Qty	Cost Code WM	Estimated Amount	Quoted Amount	Final Amount	Billing Amount	Subcontract Change
		J448957	04 8888	8888	NA	J448957.04 88							750.00	
	J448957		04 0500	1000	HR	J448957.04 05	2		NA				5,000.00	
													5,750.00	

Vendor Name: Cost Code Desc:

Change Orders

Enter PCI

POTENTIAL CHANGE ITEMS Table Mode Save Exit Print Help ?

SELECTION CRITERIA

Company: CCC CMIC Test Construction Company
Project: P448957 Freshmart Office Building - Chicago II Contract: J448957 [Change Item Markup Rules](#)

PCI INFORMATION

Search Insert Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type

* Type: OBC Original Budget Change Orders * Status: APPROVED Approved
* PCI NO.: COB0000001 OBC Total Budgeted: 0.00 Total Billing: 0.00

General Detail Summary RFQ Approval Notes Attachment History

Allowance: Neither Owner Allowance Amt: Due to Owner: 03/Aug/2017
Source: * Date: 03/Aug/2017
Source Type: Start Date: End Date: Post Date: 01/Jan/2014
Reason: Days Impact: Owner CO#: OCO-0000001 Owner CO:
Scope Desc:
Entered By: Mike Fernandes

Proceed
 Forecast
 Post Vendor Contracts with PCI
 Update Projected Amount during Posting
[Recalculate Projected Amount](#)

Pgm: PMCHGFM – Change Order Entry

The creation of a Potential Change Item (PCI/Change Order) has the potential to change the following:

- Cost Budget (JC Budget) associated with Job.
- Client’s Bill (JB Contract) associated with Job.
- Vendor Subcontracts on the Job – specified using **Vendor** and **Contract** fields on **Detail** tab.
- Contract Forecasting forecasts.

For an overview of PCI basics, please refer to the [PCI Basics – Quick Guide](#) section in this guide.

Table Mode & Form Mode

Table Mode

POTENTIAL CHANGE ITEMS Add New Save Exit Print Help Refresh Close

SELECTION CRITERIA

Company: CCC (CMIC Test Construction Company)
Project: P448957 (Freshmart Office Building - Chicago II) Contract: J448957

CHANGE ITEMS

View Filter Freeze Detach Search Insert Delete Workflows Report Options Export Attachments Notes ECM Documents User Extensions

Edit	Type	PCI NO.	Description	Status
	OBC	COB0000001	OBC	APPROVED
	OBC	COB0000002	OBC SCO	APPROVED
	OBC	COB0000003	26 0500 - Cost Increase \$20K Rev. Inc & Rev. Incre	APPROVED
	EXT	COE0000001	03-100.1000 increase of \$100 000	APPROVED
	EXT	COE0000002	external CO 03 31 13.1000	APPROVED
	EXT	COE0000003	03 31 13.2000 10K Increase for extra concrete	APPROVED
	INT	COI0000001	Internal CO	APPROVED
	INT	COI0000002	Internal CO Related to Subcontract	APPROVED
	INT	COI0000003	Heavy Weight Structural Concrete (03 31 13.1000)	APPROVED
	INT	COI0000004	SC A1MASON-0002 - 10k Increase	APPROVED
	INT	COI0000005	SC A1MASON-0002 - 10K Increase	APPROVED
	INT	COI0000006	INT	APPROVED
	TFR	COT0000001	Trans. 26 0500.1000 to 26 0500.2000	APPROVED

When the Enter PCI screen is in Table Mode, the [Add New] button (framed above) is displayed, and the list of PCIs against the Project selected in the **Selection Criteria** section are shown.

The [Add New] button is used to switch the screen to Form Mode for the creation of a new PCI.

The Edit icons are used to view a PCI in Form Mode.

Form Mode

POTENTIAL CHANGE ITEMS Table Mode Save Exit Print Help ? ? ? ? ? ? ? ? ? ?

SELECTION CRITERIA
Company: CCC CMIC Test Construction Company
Project: P448957 Freshmart Office Building - Chicago II Contract: J448957 Change Item Markup Rules

PCI INFORMATION
Search Insert Delete Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type
* Type: [] * Status: []
* PCI NO.: [] Total Budgeted: [] Total Billing: []

General Detail Summary RFQ Approval Notes Attachment History
Allowance: Neither Owner Allowance Amt: [] Due to Owner: 02/Jan/2018 Proceed
Source: [] * Date: 02/Jan/2018 Forecast
Source Type: [] Start Date: [] Post Vendor Contracts with PCI
Reason: [] End Date: [] Update Projected Amount during Posting
Days Impact: [] Post Date: [] Recalculate Projected Amount
Owner CO#: []
Scope Desc: []
Entered By: []

When the Enter PCI screen is in Form Mode, the [Table Mode] button (framed above) is displayed, and either a new PCI or selected PCI is shown.

The [Table Mode] button is used to switch the screen to Table Mode, to view the PCIs against the Project selected in the **Selection Criteria** section.

Selection Criteria – Section

POTENTIAL CHANGE ITEMS Add New Save Exit Print Help ? ? ? ? ? ? ? ? ? ?

SELECTION CRITERIA
Company: CCC CMIC Test Construction Company
Project: 12345 12345 - Contract Forecasting Contract: 12345

CHANGE ITEMS

Company

Company handling Job.

Project

Project associated to Job.

Contract – Display-Only Field

Job Code of associated Job.

[Change Item Markup Rules] – Button

Available when screen is in Form Mode. For details, please refer to [PCI Markup Rules](#) section.

PCI Information – Section

Type

PCI's type.

PCI NO., *Description*

PCI number identifying PCI. Corresponding field to the right is for the PCI's description.

If the CM Control File's **Automatic Numbering Of Change Items** checkbox is checked, when the PCI is saved, the system automatically generates the PCI number based on the mask set up for the PCI's type.

Status

PCI's approval status.

Total Budgeted – Display Only

Total JC Budget Amount for Bill Codes in lines listed on **Details** tab.

Total Billing – Display Only

Total JB Revenue (Contract) Amount for Bill Codes in lines listed on **Details** tab.

General – Tab

Allowance, Owner Allowance Amt

These fields are used for the Allowance Tracking functionality, which is also implemented using the **In Scope Allowance Category** and **Out Of Scope Allowance Category** fields on the CM Control File screen, and the [**Allowance Tracking**] button on the **Detail** tab of this screen.

The **Owner Allowance Amt** field is enabled when the “**Out Of Scope**” type is selected for the **Allowance** field.

If the **Allowance** field is set to “**Out Of Scope**” or “**T&M Tracking**”, the [**Allowance Tracking**] button on the **Detail** tab becomes enabled.

Source

This is an informational field only, and will show a value which represents the PM object from which the PCI is created.

Source Type

Select value from the LOV if applicable.

Reason

Select value from the LOV if applicable.

Days Impact

Enter number of days of impacted by change. These will print on the Change Order and calculate new finish date.

Owner CO#

Enter the Owner Change number associated with the Change Order. The Owner Change number is a reference field that will appear on Job Billing AIA style report.

Scope Desc

Description of scope, in regards to the change.

Entered By – Display Only

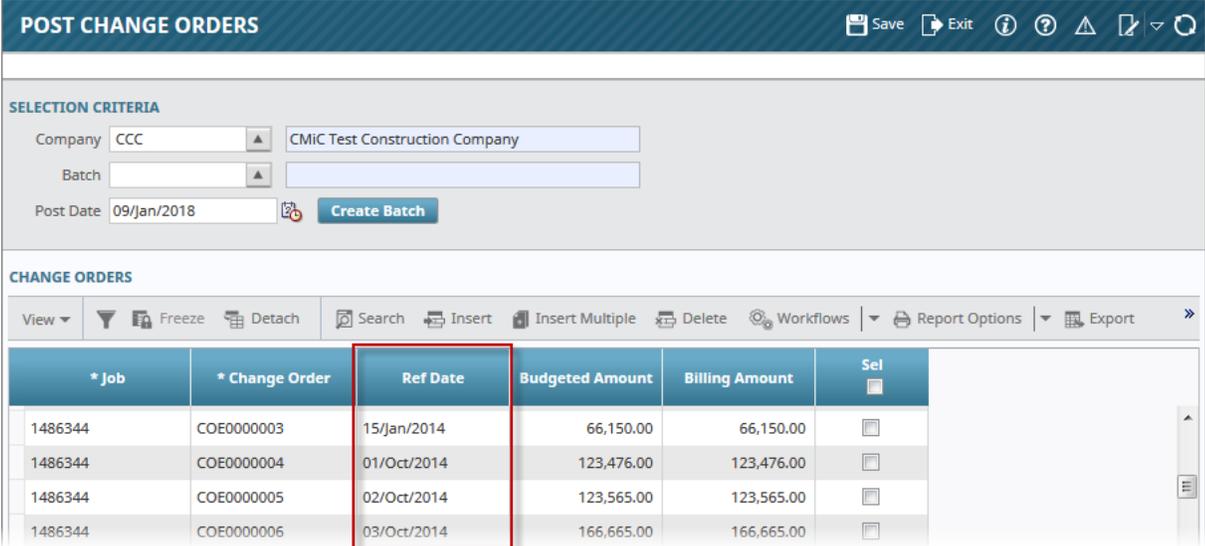
Name of user that created the PCI.

Due to Owner

For reference purposes only, to indicate when this change is due to the owner.

Date

Defaults to current system date, but can be overridden if required. This date is used as the Reference Date for the PCI in other screens, such as the Post Change Orders screen:



The screenshot shows the 'POST CHANGE ORDERS' application window. It features a 'SELECTION CRITERIA' section with fields for Company (CCC), Batch, and Post Date (09/Jan/2018), along with a 'Create Batch' button. Below this is a 'CHANGE ORDERS' table with a toolbar containing options like View, Freeze, Detach, Search, Insert, Insert Multiple, Delete, Workflows, Report Options, and Export. The table has the following data:

* Job	* Change Order	Ref Date	Budgeted Amount	Billing Amount	Sel
1486344	COE0000003	15/Jan/2014	66,150.00	66,150.00	<input type="checkbox"/>
1486344	COE0000004	01/Oct/2014	123,476.00	123,476.00	<input type="checkbox"/>
1486344	COE0000005	02/Oct/2014	123,565.00	123,565.00	<input type="checkbox"/>
1486344	COE0000006	03/Oct/2014	166,665.00	166,665.00	<input type="checkbox"/>

Pgm: CMPSTCHG – Post Change Orders

Start Date, End Dates

Start and end date of the Change Order.

Post Date

Date PCI was posted.

Proceed – Checkbox

Check this flag to indicate whether the change order will be carried out.

Forecast – Checkbox

Check this flag to include the change order in the Contract Forecast.

Post Vendor Contracts with PCI – Checkbox

The state of this display-only checkbox defaults from the **Post Vendor Contracts with PCI** checkbox on the CM Control File.

If checked, the Subcontract associated to this PCI is posted at the same time as the PCI; otherwise, the related Subcontract is posted separately.

Update Projected Amount during Posting – Checkbox

The state of this display-only checkbox and the corresponding display-only field under it default from the **Update Projected Amount during Posting** checkbox and its corresponding field on the CM Control File.

The box's state depends on whether or not projections are entered via JC on a regular basis.

If checked, the default for Change Orders is to update the Job Projected Amount each time a Change Order is posted.

If Change Orders are already included in the amounts for your projection forecasts, then this box should not be checked.

The corresponding field under this checkbox displays how the projected amount gets updated:

Add Change Budget Amount: Change Order cost budget will be added to the previous projected amount.

Recalculate Projected Amount: Projected Amount equals the highest of Current Budget (including CO being posted), the Spent To Date or the Previously Projected Amount.

Detail – Tab

This tab is used to enter lines to change the JC Budget Amount and/or JB Revenue (Contract) Amount of Bill Codes.

For details about creating PCIs, please refer to the following section: [PCI Basics – Quick Guide](#).

[Show Rates], [Hide Rates] – Buttons

Click **[Show Rates]** to display the **Estimated Rate**, **Quoted Rate** and **Final Rate** columns, which are used with the **WM** and **Quantity** fields to calculate the **Estimated Amount**, **Quoted Amount** and **Final Amount** fields.

Click **[Hide Rates]** to hide these columns.

[Calc. Markups] – Button

This button is enabled for unposted PCIs.

Click to apply all relevant markups. For details, please refer to the following section: [PCI Markup Rules](#).

[Allowance Tracking] – Button

This button's popup is used to implement the Allowance Tracking functionality, which provides the ability to enter T&M amounts submitted by subcontractors against Allowance Type PCIs into any Cost Code/Category designated as that type.

The Allowance Tracking functionality is also implemented using the **In Scope Allowance Category** and **Out Of Scope Allowance Category** fields on the CM Control File screen, and the **Allowance** field on the **General** tab of this screen.

This button is enabled if the **Allowance** field on the **General** tab is set to "**Out Of Scope**" or "**T&M Tracking**". Also, if the PCI's detail line

If the Category in the PCI detail does not match the type of allowance, when this button is clicked, a message is displayed, and no allowance tracking information is allowed in such a case.

Initially, when the Subcontract Change Code and Task Code are pulled into the PCI detail, the Estimated, Quoted, Final and Billing Amounts get updated with the Subcontract Amount.

When the Allowance Tracking popup is updated with amounts, these update the PCI detail, depending on the type of allowance.

Owner

Projected Balance = Owner Allowance – Total of right-most value (of Estimated, Invoiced and Approved)

Contractor

Allowance = Amount from the subcontract for that all PCI detail lines with that Allowance Type category

Projected Balance = Allowance – Total of right-most value (of Estimated, Invoiced and Approved)

Projected to Date = Total of right-most value (of Estimated, Invoiced and Approved)

NOTE: Zero is considered as an amount, and null is not considered an amount.

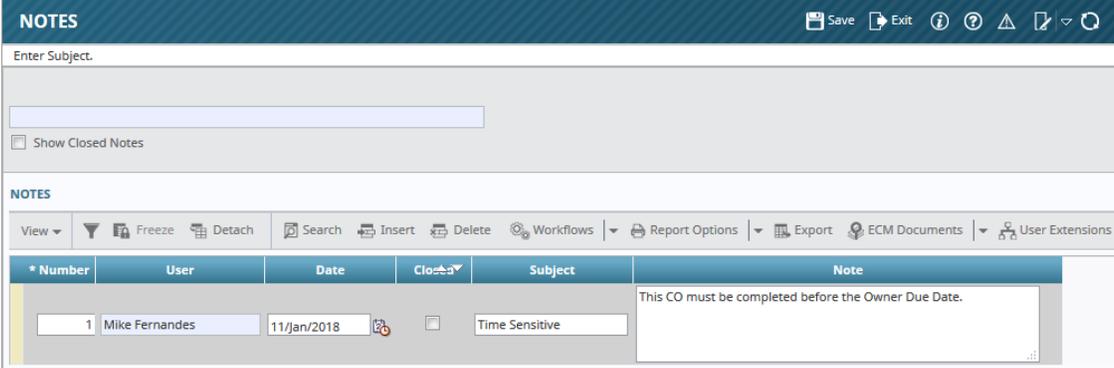
[PCI Participation] – Button

This button’s popup can be used for lines with a Vendor (subcontractor) and Subcontract specified. It is used to split the cost of the change with one or more Vendors.

[SCO] – Button

If this PCI is for a Subcontract Change Order, this button can be used to create the PCI’s corresponding Subcontract Change Order.

[Line Notes] – Button



The screenshot shows a software interface titled "NOTES". At the top, there is a header bar with "NOTES" on the left and icons for Save, Exit, Help, and Refresh on the right. Below the header is a text input field labeled "Enter Subject." and a checkbox labeled "Show Closed Notes". A secondary toolbar contains icons for View, Freeze, Detach, Search, Insert, Delete, Workflows, Report Options, Export, ECM Documents, and User Extensions. The main area is a table with the following columns: * Number, User, Date, Closed, Subject, and Note. The table contains one row with the following data: 1, Mike Fernandes, 11/Jan/2018, Time Sensitive, and a note: "This CO must be completed before the Owner Due Date."

This button's popup is used to enter notes for the selected line.

Vendor, Contract

If the Bill Code to which the change applies is handled by a Subcontract, use the **Vendor** field to select the Vendor handling the Subcontract, and the **Contract** field to select the Subcontract.

Job

Select the Job to be affected by this Change Order. The LOV is limited to the Job and its Sub-Jobs associated to the selected Project.

Cost Code, Category

Enter the Cost Code and Category for the Bill Code impacted by to this PCI. The **Billing Code** field is auto-populated based on these entries.

Billing Code

Enter the Billing Code associated with this line item. The system provides for the entry of Bill Codes in 3 different ways:

- The Billing Code can be a unique billing code which has not been setup previously in the Job Billing application.
- The Billing Code can be selected from the master list of codes, which has not yet been used within the original contract.
- The Billing Code can be an existing Bill Code on the JB Contract, which will update the original schedule of values.

The Billing Code is not a required field if the contract is of the Direct AR Billing type.

Days Impact

Number of days schedule is impacted due to change.

Cost Code WM

Select Cost Code's weight measurement from the LOV.

Estimated Amount

Enter estimated budget amount.

This field can also be auto-populated if rates and quantity fields are used. For details, please refer to the details about the [Show Rates] button for further details.

Quoted Amount

Enter quoted budget amount.

This field can also be auto-populated if rates and quantity fields are used. For details, please refer to the details about the [**Show Rates**] button for further details.

Final Amount

If the Bill Code's JC Budget Amount is to be changed, enter the amount (positive/negative) in this field.

If a new Bill Code is being added, enter its JC Budget Amount.

This field can also be auto-populated if rates and quantity fields are used. For details, please refer to the details about the [**Show Rates**] button for further details.

Billing Amount

If the Bill Code's JB Revenue Amount is to be changed, enter the amount (positive/negative) in this field.

If a new Bill Code is being added, enter its JB Revenue Amount.

This field can also be auto-populated if rates and quantity fields are used. For details, please refer to the details about the [**Show Rates**] button for further details.

Subcontract Change

If applicable, select associated Subcontract Change Code from LOV.

Task ID

Task ID for Subcontract Change Order.

Status Code

Approval Status of PCI.

OCO No

If applicable, select the associated Owner Change Order.

Long Description

Description about PCI.

Summary – Tab

The summary tab displays an overview of the pending change item by vendor. Information such as Vendor, Budgeted Amount and Billing Amount are shown along with their totals.

RFQ – Tab

If you wish to get a quote for this work, quote information can be entered on this tab. The RFQ can be sent to a number of business partner contacts (with valid email addresses) by using the [**Broadcast RFQ's**] button.

Approval – Tab

If Workflow is included in your CMiC installation, and Workflow has been set up for PCI approvals, this tab is populated with Approval History details.

Notes – Tab

This tab is used to enter and review notes about the PCI.

To add a note, click [**Insert**] on the Block Toolbar, and in the new line, use the **Subject** and **Note** fields to enter the note's subject and text. Click [**Save**] when finished.

Notes entered on this tab can be deleted by the users who created them by using the [**Delete**] button on the Block Toolbar.

Attachment – Tab

[**Create New Attachment**] – Button

Click to add a new attachment.

[**Delete Attachment**] – Button

Click to delete selected attachment.

Attachment

Attachment file.

Name

Attachment's name.

Type

Attachment's type.

Number

Identifying attachment number.

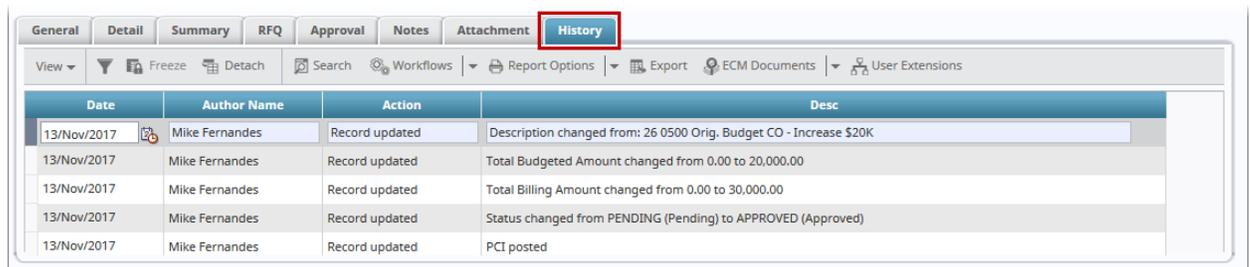
Rev. Number

Attachment's revision number.

Rev. Date

Date revision was created.

History – Tab



Date	Author Name	Action	Desc
13/Nov/2017	Mike Fernandes	Record updated	Description changed from: 26 0500 Orig. Budget CO - Increase \$20K
13/Nov/2017	Mike Fernandes	Record updated	Total Budgeted Amount changed from 0.00 to 20,000.00
13/Nov/2017	Mike Fernandes	Record updated	Total Billing Amount changed from 0.00 to 30,000.00
13/Nov/2017	Mike Fernandes	Record updated	Status changed from PENDING (Pending) to APPROVED (Approved)
13/Nov/2017	Mike Fernandes	Record updated	PCI posted

This display-only tab displays an audit history for changes made to the fields of the PCI. For instance, Total Budgeted Amount and Total Billing Amount are recorded whenever changes occur to the Budgeted Amount and/or Billing Amount of a PCI Line. This Audit History tab also records the posting of PCIs.

Prepare Owner Change Order

OWNER CHANGE ORDER Table Mode Save Exit

SELECTION CRITERIA

* Company: CCC CMIC Test Construction Company * Project: P448957 Freshmart Office Building - Chicago II
 Customer: FRSHMART Freshmart Groceries Inc. Job: J448957 Freshmart Office Building - Chicago II Back Print Change Order Report

OWNER CHANGE ORDER Search Insert Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Delete Post

* Change: OCO-00000001 Title: Owner CO
 Proposal: [Dropdown]

Summary Change Items Text Codes Distribution

The Original Contract Sum was	30,000.00	Days Impact	[Field]
Net Change By Previously Authorized Requests and Changes	0.00	Issued Date	[Field]
The Contract Sum will be Increased By	0.00	Executed Date	[Field]
The New Contract Sum including this Change Order	30,000.00	Post Date	[Field]
The Original Completion date was	31/Dec/2018	Sent Date	[Field]
Time Change Prior To This Change Order Were	0	Received Date	[Field]
Time Change In This Change Order is	[Field]		
The Date of Substantial Completion As Of This Change Order Therefore Is	31/Dec/2018		

Notes [Text Area]

Pgm: PMOWNCHG – Owner Change Order – Summary tab

This screen allows the compilation of multiple PCIs into one Owner Change Order. Owner Change Orders can be automatically numbered by the system, so you may not be able to enter the Change Number field. This is when the auto-numbering option is selected in the CM Control File. The 'Allow Override' flag for Owner Change Orders is only applicable to the PM JSP version. The flag is only available for setting if OCO auto-numbering is being used.

Summary – Tab

Proposal: [Dropdown]

Summary Change Items Text Codes Distribution

The Original Contract Sum was	30,000.00	Days Impact	[Field]
Net Change By Previously Authorized Requests and Changes	0.00	Issued Date	[Field]
The Contract Sum will be Increased By	0.00	Executed Date	[Field]
The New Contract Sum including this Change Order	30,000.00	Post Date	[Field]
The Original Completion date was	31/Dec/2018	Sent Date	[Field]
Time Change Prior To This Change Order Were	0	Received Date	[Field]
Time Change In This Change Order is	[Field]		
The Date of Substantial Completion As Of This Change Order Therefore Is	31/Dec/2018		

Notes [Text Area]

This tab displays various amounts, dates and notes for the Owner Change Order.

Change Items – Tab

Pgm: PMOWNCHG – Owner Change Order – **Change Items** tab

This tab allows for the addition, deletion, and modification of pending change items as well as their details. Also, through the Change Items tab PCIs can be approved.

Text Codes – Tab

Pgm: PMOWNCHG – Owner Change Order – **Text Codes** tab

This tab is used to add predefined text to the Owner Change Order. The predefined text is set up using the following maintenance screens:

System > Global Tables > Text Type
System > Global Tables > Text Code

To add predefined text, click the Block Toolbar's [**Insert**] button. In the new row, select the **Type** (Text Type) and **Code** (Text Code), and the **Description** field will be populated with the text entered for the Text Type and Code.

Type

Select a predefined Text Type from the LOV.

The Text Type maintenance screen (program: TEXTTYP) is found via the following standard Treeview path: *System > Global Tables > Text Type*.

Code

Select a predefined Text Code from the LOV

The Text Code maintenance screen (program: TEXTFM) is found via the following standard Treeview path: *System > Global Tables > Text Codes*.

Description

After the **Type** and **Code** fields are selected, the predefined text appears in this field, which can be modified.

Distribution – Tab

The screenshot shows the 'Distribution' tab in the PMOWNCHG application. At the top, there is a 'Proposal' dropdown menu. Below it are tabs for 'Summary', 'Change Items', 'Text Codes', and 'Distribution'. A toolbar contains various actions: 'Add From Distribution List', 'View', 'Freeze', 'Detach', 'Search', 'Insert', 'Insert Multiple', 'Delete', 'Workflows', 'Report Options', 'Export', 'ECM Documents', and 'User Extensions'. A table with the following columns is visible: 'CC', 'Partner', 'Contact', and 'Contact Name'. The table contains one row with a checked checkbox in the 'CC' column, 'A1CEV' in the 'Partner' column, 'HB' in the 'Contact' column, and 'Hard Bond' in the 'Contact Name' column.

CC	Partner	Contact	Contact Name
<input checked="" type="checkbox"/>	A1CEV	HB	Hard Bond

Pgm: PMOWNCHG – Owner Change Order – Distribution tab

Add any distribution parties and courtesy copies as required.

Enter Subcontract/Change Order

SUBCONTRACT MAINTENANCE
Table Mode Save Exit ? ? ? ? ? ? ? ? ? ?

SELECTION CRITERIA

Company ZZ CMIC Construction Inc. Show Subcontracts Open

Project YR0099 YR0099 Job Code YR0099 Back

SUBCONTRACT INFORMATION

Search Insert Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Original Participation **Overall Participation** Compliance Joint Check Copy From Contract

* Vendor A1CEMENT Vendor Name A1 CEMENT INDUSTRIES.

Contract CEMENT101 Description CEMENT101

Summary General Schedule of Values Change Orders Dates Text Codes Free Form Attachment Special Pricing Inclusions Exclusions

	Original	Changes To Date	Revised
Contract Value	7,000.00	0.00	7,000.00
Completion Date		0 Days	

Contract Type Standard Default Retainage % 0 Do Not Exceed

* Status POSTED * Self Billed Override Do Not Exceed Amount

Scope of Work

Default Cost Code Category

Pgm: PMSCFM – Subcontract Entry

The Enter Subcontract/Change Order screen is used to enter Subcontracts or Subcontract Change Orders directly.

This screen is also found in the Subcontract Management module. For details about this screen, please refer to the Subcontract Management user guide.

Print PCI Report

The screenshot shows a software interface titled "PRINT CHANGE ORDER". At the top right, there are icons for Save, Exit, Help, and other functions. The main area is labeled "SELECTION CRITERIA" and contains several fields for filtering the report:

- * Company: CCC (dropdown), CMIC Test Construction Company (text field)
- * Posting Criteria: Unposted (dropdown)
- Starting Type: INT (dropdown), Internal Change Orders (text field)
- Ending Type: INT (dropdown), Internal Change Orders (text field)
- Starting Status: (dropdown)
- Ending Status: (dropdown)
- Starting Job: J448957 (dropdown), Freshmart Office Building - Chicago II (text field)
- Ending Job: J448957 (dropdown), Freshmart Office Building - Chicago II (text field)
- Starting Change Order: (dropdown)
- Ending Change Order: (dropdown)

At the bottom, there is a checkbox for "Detail Change Order Information" which is checked, and a "Print" button.

Pgm: CMCHGPRT – Change Order Report

The Change Order listing printed through this screen can be used to check the entry of PCIs prior to approval, and to print a listing of posted PCIs on a Job-by-Job basis.

The Change Order listing will display a line break for each Job selected within the selection criteria. Below the Job line, the report will display a summary line for each Change Order selected within the criteria and display the Change Order date, description, as well as the Total Budget Amount and Change Order Amount.

Further detail can be selected which will display the particulars of the Change Order. The detail section will display the Cost Job, Cost Code, Cost Category, the Billing Code, Invoice Code, Billing Cost Code, Billing Category, Vendor Code, Subcontract Code, and the associated Budget Amount and Change Order Amount.

Press the [**Print**] button to begin printing the Change Order Listing.

Company

Company under which Change Orders were created.

Posting Criteria

Unposted: if selected, only unposted PCIs are considered.

Posted: if selected, only posted PCIs are considered.

Both: if selected, both unposted and posted PCIs are considered.

Starting Type, Ending Type

If both fields are left blank, the range includes all PCI Types.

If the **Starting Type** field is left blank, the range starts with the first PCI Type, by code.

If the **Ending Type** field is left blank, the range ends with the last PCI Type, by code.

If the same PCI Type is selected for both fields, only PCIs of that type are included.

Starting Status, Ending Status

If both fields are left blank, the range includes all Approval Statuses.

If the **Starting Status** field is left blank, the range starts with the first Approval Status, by code.

If the **Ending Status** field is left blank, the range ends with the last Approval Status, by code.

If the same Approval Status is selected for both fields, only PCIs of that status are included.

Starting Job, Ending Job

If both fields are left blank, the range includes all Jobs.

If the **Starting Job** field is left blank, the range starts with the first Job, by code.

If the **Ending Job** field is left blank, the range ends with the last Job, by code.

If the same Job is selected for both fields, only PCIs against that Job are included.

Starting Change Order, Ending Change Order

If both fields are left blank, the range includes all PCIs.

If the **Starting Change Order** field is left blank, the range starts with the first PCI, by code.

If the **Ending Change Order** field is left blank, the range ends with the last PCI, by code.

If the same PCI is selected for both fields, only that PCI is included.

Detail Change Order Information – Checkbox

If checked, the detailed budget, billing and subcontract information that make up the PCIs is displayed.

Update PCI Status

UPDATE PCI STATUS
Save Exit ? ? ? ? ? ? ? ?

SELECTION CRITERIA

Company

Job

UNAPPROVED

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export ECM Documents

* Change Order	Type	Ref Date	Billing Amount	Budgeted Amount	Status	Owner Change Number
EXT00019	EXT	21/Mar/2016	112500	90000	PENDING	

Status Name Pend Type Proceed Forecast

C/O Desc

APPROVED

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export ECM Documents

* Change Order	Type	Ref Date	Billing Amount	Budgeted Amount	Status	Owner Change Number
EXT00022	EXT	21/Mar/2016	112500	94700	APPROVED	
EXT00024	EXT	21/Mar/2016	112500	94700	APPROVED	
EXT00025	EXT	21/Mar/2016	112500	92350	APPROVED	
EXT00026	EXT	21/Mar/2016	112500	94700	APPROVED	

Status Name Pend Type Proceed Forecast

C/O Desc

Pgm: CMCHGAPV – Change Order Approvals

The Update Change Order Status screen is used to adjust the Approval Status of unposted PCIs.

NOTE: You must set the PCI to a status that represents approval in order to post the PCI.

Selection Criteria – Section

Select the **Company** and **Job** under which the relevant PCIs were entered.

Unapproved – Section

This tab lists all unapproved PCIs.

Change the **Status** as required for each PCI, and use the [**Update Status**] button to commit the updates.

NOTE: Only unposted PCIs can have their Approval Status changed.

Approved – Section

This tab lists all approved PCIs.

Change the **Status** as required for each PCI, and use the [**Update Status**] button to commit the updates.

NOTE: Only unposted PCIs can have their Approval Status changed.

Post PCI

* Job	* Change Order	Ref Date	Budgeted Amount	Billing Amount	Sel
1000	COE0000004	20/Nov/2012	1,000.00	1,001.00	<input type="checkbox"/>
1000	EXT-1001	28/Jan/2014	100.00	30,000.00	<input type="checkbox"/>
12345	COE0000006	14/Oct/2015	85,000.00	85,000.00	<input type="checkbox"/>
12345	COE0000007	14/Oct/2015	22,222.00	22,222.00	<input type="checkbox"/>
12345	COE0000008	14/Oct/2015	333,333.00	333,333.00	<input type="checkbox"/>
12345	COE0000009	22/Feb/2016	1,500.00	1,500.00	<input type="checkbox"/>
12345	COE0000010	01/Feb/2016	1,931,000.00	1,931,000.00	<input type="checkbox"/>
12345	COE0000013	22/Mar/2016	75,000.00	75,000.00	<input type="checkbox"/>
12345	COE0000014	06/May/2016	75,000.00	75,000.00	<input type="checkbox"/>
12345	COE0000015	06/May/2016	75,000.00	75,000.00	<input type="checkbox"/>
12345	COE0000016	23/Sep/2016	7,500.00	8,500.00	<input type="checkbox"/>

Pgm: CMPSTCHG – Post Change Orders

Use this screen to post approved PCIs via a Batch.

When this procedure is performed, the Job Billing Contract is updated with the Change Order, the Job Costing Budget is updated with the budget update or with the committed cost, and where applicable, the Subcontract is updated with the Change Order to the Subcontract. For details, please refer to the [PCI Basics – Quick Guide](#) section.

Selection Criteria – Section

Company

Select the Company for which the PCIs will be posted

Batch

Select an existing Batch or click [**Create Batch**] to create a new Batch. The Batch Type will default to “**H**” to indicate it is a Change Order Batch.

This field’s LOV is populated with the user’s unposted Batches, and if the user has the security privilege to see other user’s Change Management Batches (“**CMPG**”), it is also populated with all unposted Batches for the Company.

The display-only field to the right of this field displays the Batch’s name, which is composed of three parts: user’s name, current date, and Batch Type code (single letter).

Post Date

Enter the Batch's post date.

[Create Batch] – Button

Click to create a new Batch and to have its automatically generated number put into the **Batch** field. Also, when a Batch is created, it is associated to the user, assigned a Batch Type code, and a Batch Name is automatically generated for it.

Change Orders – Section

This section lists the unposted PCIs to which you have access. Checking a PCI's **Sel** checkbox adds it to the Batch for posting.

Job

Job that PCI was entered against.

Change Order

PCI's identifying Change Order Number.

Ref Date

PCI's Reference Date, which was entered using the **Date** field on the **General** tab of the Enter PCI screen.

Budgeted Amount

Amount of change to JC Budget Amount.

Billing Amount

Amount of change to JB Revenue Amount.

Print Reports Immediately – Checkbox

Check this box to print the posting report immediately after posting.

If unchecked, the posting report will not be printed, but can it be printed later using the Print Posting Reports utility.

Delete Reports After Posting – Checkbox

Check this box if you want to delete this posting report at the end of the posting process. Once deleted, users will not be able to print the reports later.

If you leave this box blank, the posting report can be re-printed later.

[Post] – Button

Click to post the selected Change Orders.

Logs

Unposted PCI

UNPOSTED PCI MASTER LOG							
> Search Advanced Layout Saved Search All Fields							
View Format Freeze Detach Wrap Clear Query Export ECM Documents							
Find <input type="text"/> Go							
Company Code	Job Code	Change Code	Name	Ref. Date	Budget Amount	Bill Amount	Status
CCC	1486344	COE0000004	Eligible Debris: Debris which is within the s	01/Oct/2014	123476.00	123476.00	APPROVED
CCC	523M	COE0000003	Ext	01/Nov/2014	4000.00	6000.00	PENDING
CCC	J448957	COE0000004	Exterior Stone Wall - Extra Labor	11/Jan/2018	1000.00	5750.00	PENDING
CCC	523M	COE0000001	External	01/Nov/2014	4000.00	6000.00	PENDING
CCC	1500175	COE0000001	External	01/Dec/2014	3300.00	4330.00	PENDING
CCC	J00020.000	COE0000003	External	18/Aug/2011	100000.00	100000.00	PENDING
CCC	J448957	COE0000006	External CO - Owner Allowance	12/Jan/2018	0.00	0.00	APPROVED
ZZ	DEFAULT	EXT8908	External Change Item Sample	25/jul/2013	750.00	750.00	PENDING
ZZ	DEFAULT	EXT8907	External Change Item Sample	25/jul/2013	750.00	750.00	PENDING
CCC	WBS1	COE0000001	External Change Order	04/Mar/2015	10000.00	10000.00	APPROVED
ZZ	GILBANE-01	EXT0003	External Owner Directed Changes	01/jun/2011	14750.00	14750.00	PENDING
ZZ	GILBANE-01	EXT0001	External Owner Directed Changes	01/jun/2011	14750.00	890.00	PENDING
CCC	1491214-3	COE0000005	External PCI Testing for Pending PCI Billing	01/Jan/2014	28000.00	28000.00	PENDING
CCC	1523M	COE0000003	FLOOR2	08/Jan/2015	25000.00	25000.00	APPROVED
CCC	FORECAST3	COE0000001	FORECAST3	06/Apr/2015	10000.00	0.00	APPROVED
					63559374864.75	65358132320.14	

Pgm: CM_UNPOST_PCIMAST_LOG – Unposted PCI Master Log

This Log is used to view all unposted PCIs, under all Companies.

Use the **Find** search box and the wildcard character “%” to search the text of the **Job Code**, **Change Code** and **Name** fields.

The **Budget Amount** and **Bill Amount** columns have a total at the bottom.

Posted PCI

POSTED PCI MASTER LOG							
Search							
Company Code	Job Code	Change Code	Name	Ref. Date	Budget Amount	Bill Amount	Status
CCC	J00027.000	COE0000001	External Change	26/Jul/2011	10000.00	0.00	APPROVED
CCC	J00027.000	COI00000001	Internal Change Order	26/Jul/2011	200000.00	0.00	APPROVED
CCC	J448957	COE0000001	03-100.1000 increase of \$100 000	11/Oct/2017	0.00	100000.00	APPROVED
CCC	J448957	COE0000002	external CO 03 31 13.1000	07/Nov/2017	0.00	20000.00	APPROVED
CCC	J448957	COE0000003	03 31 13.2000 10K Increase for extra concrete	09/Nov/2017	10000.00	15000.00	APPROVED
CCC	J448957	COI0000002	Internal CO Related to Subcontract	07/Nov/2017	10100.00	0.00	APPROVED
CCC	J448957	COI0000003	Heavy Weight Structural Concrete (03 31 13.1000) - 10K Inc	08/Nov/2017	10000.00	0.00	APPROVED
CCC	J448957	COI0000004	SC A1MASONS-0002 - 10k Increase	08/Nov/2017	10000.00	0.00	APPROVED
CCC	J448957	COI0000005	SC A1MASONS-0002 - 10K Increase	09/Nov/2017	10000.00	0.00	APPROVED
CCC	J448957	COI0000006	INT	09/Nov/2017	3785.00	0.00	APPROVED
CCC	J448957	COT0000001	Trans. 26 0500.1000 to 26 0500.2000	10/Nov/2017	0.00	0.00	APPROVED
CCC	WBS1	COE0000002	External	12/Mar/2015	30000.00	37500.00	APPROVED
CCC	WBS3	COE0000003	external approved	27/Mar/2015	7500.00	7500.00	APPROVED
					41866002.30	40035802.77	

Pgm: CM_POST_PCIMAST_LOG – Posted PCI Master Log

This Log is used to view all posted PCIs, under all Companies.

Use the **Find** search box and the wildcard character “%” to search the text of the **Job Code**, **Change Code** and **Name** fields.

The **Budget Amount** and **Bill Amount** columns have a total at the bottom.

Owner Change Order

CM - OWNER CHANGE ORDER LOG											
Search											
OCO	Title	Status	Amt	Sent Date	Issued Date	Executed Date	Received Date	Post Date	Proposal	Impact Days	
OCO-00000001	Owner CO	Approved	0.00								
OCO-00000002	Owner CO - Extra Cement	Pending	5,750.00								
OCO-00000003	Owner CO - Extra Masonry Labor	Pending	0.00								
			5,750.00								
3 records											

Pgm: PMOCO_LOG – Owner Change Order Log

This log is used to view a user’s Owner Change Orders.

Use the **Find** search box and the wildcard character “%” to search the text of the **OCO** and **Title** fields.

The **Amt** column has a total at the bottom.

Reports

Report Parameters – Popup

Enter Parameters for: Job Budget Change Report (CM1000) **Report Specific Parameters**

* Company CCC CMiC Test Construction Company

From Job 1000 Project 1000 With Job Series 1000 (Forecast with ADF Only)

To Job YR0035 Freshmart - Misty River Grocery Store

From Cost Code 00 Preconstruction

To Cost Code L7 L7

From Category

To Category

From Date 01/jan/2018

To Date 31/jan/2018

* Posting Criteria P Posted

* Suppress Zero Lines Suppress Zero Lines

Destination Preview **Output Parameters (common to all reports)**

Output Format PDF Locale English US

Edit Defaults Run Report Cancel

Sample of Report Parameters popup for parameter entry

Report Parameter popups are used to specify the parameters for reports. As shown above, they are comprised of two sections. The Report Specific Parameters section contains the parameters that are specific to the report, and the Output Parameters section contains options that are common to all reports.

Report Specific Parameters – Section

Range Parameters

Range fields are used to specify a range for reports, such as specifying a range of Jobs for the report to consider.

All range fields for reports work the same way, which is as follows:

From/Starting, To/Ending (e.g., From Job, To Job; Starting Code, Ending Code)

If both fields are left blank, the range includes all in range.

If **To/Starting** field is left blank, range starts with first element in range, by code.

If **From/Ending** field is left blank, range ends with the last element in range, by code.

If the same element is selected for both fields, the range is only comprised of that element.

Output Parameters – Section

Sample of Printing Options screen for parameter entry

The following provides details about the Output Parameters section, which is common to all Report Parameter popups.

Destination

The **Destination** field is used to specify the report's output, as per the following:

Preview	<p>This option is used to <u>preview</u>, <u>save</u> or <u>print</u> the report via a new tab on your web browser.</p> <p>Once this options is selected, click [Run Report] to preview the report on a new tab of your web browser. To print or save the report, use the browser's printing and saving functionality.</p>
----------------	---

<p>Email</p>	 <p>Select E-Mail from the Destination drop-down list of the Report Parameters popup, and select the report's format (PDF, HTML, Excel, RTF, CSV) using the Output Format drop-down list. Next, click the [Run Report] button to bring up the Email window, as shown above, to enter the email information. To enter more than one address, use a comma as a separator. Click [OK] to create and send the report via Email.</p>
<p>Printer</p>	<p>This option is used to print a report using a specific printer.</p> <p>If this option is selected, the Print Server and Printer Name fields become available, to specify which printer to use to print the report.</p>

Output Format

The **Output Format** field is used to specify the report's file format.

Local

Used to select language for report's headers.

[Edit Defaults] – Button

Used to edit the parameters on Report Parameter popups. For details, please refer to the following quick guide: *Jasper Parameters Customization – Quick Guide*.

Job Budget Change Report

CMiC		CCC - CMiC Test Construction Company					Page: 2 of 3	
		CHANGE MANAGEMENT - JOB BUDGET CHANGE DETAIL REPORT					Date: January 17,	
							Time: 6:40 PM EST	
Job								
Cost Code								
Category	Name	Original Budget	Total Budget					
Change#	Description	Reference Date	Change Amount	Status	Owner CO#	Vendor	Vendor Name	
Job J448957								
1000	Labour	125,000.00						
COE000001		October 11, 2017	0.00	Approved				
Labour TOTAL:		125,000.00	0.00		125,000.00			
2000	Subcontract	150,000.00						
COI000002		November 07, 2017	10,100.00	Approved		A1CEMENT	A1 CEMENT INDUSTRIES.	
Subcontract TOTAL:		150,000.00	10,100.00		160,100.00			
Structural Concrete TOTAL:		275,000.00	10,100.00		285,100.00			
DIVISION 03: CONCRETE TOTAL:		507,000.00	30,100.00		537,100.00			
04 0000	MASONRY							
04 4000	Masonry - Stone							
2000	Subcontract	-10,000.00						
COI000004		November 08, 2017	10,000.00	Approved		A1MASONS	A1 Masons	
Subcontract TOTAL:		-10,000.00	10,000.00		0.00			
S	Subcontracts	15,000.00						
COI000005		November 09, 2017	10,000.00	Approved		A1MASONS	A1 Masons	
Subcontracts TOTAL:		15,000.00	10,000.00		25,000.00			
Masonry - Stone TOTAL:		5,000.00	20,000.00		25,000.00			
MASONRY TOTAL:		5,000.00	20,000.00		25,000.00			
26 0000	ELECTRICAL							
26 0500	Electrical							
1000	Labour	100,000.00						
COT000001		November 10, 2017	10,000.00	Approved				

For each Job within the range of Jobs specified on the Report Parameters popup, this report provides details about changes to JC Budget Amounts for its Cost Codes & Categories.

PCI Listing

		CCC - CMiC Test Construction Company			Page: 1 of 6	
		CHANGE MANAGEMENT - CHANGE ORDER LISTING			Date: Jan 17, 2018	
					Time: 6:50 PM EST	
<i>Change Order</i>	<i>JOB Code</i>	<i>Description</i>	<i>Owner Change#</i>	<i>Amount</i>	<i>Date</i>	<i>Post date</i>
COB0000001	GCMONITOR1	OBC	OCO-00000001	0.00	Jun 23, 2017	
COB0000001	J00020.000	OBC For J00020.000		495,000.00	Aug 18, 2011	
COB0000001	1488395	Original Budget Change		100,000.00	Jun 18, 2014	
COB0000002	J448957	OBC SCO		0.00	Aug 03, 2017	
COB0000008	CMICTEST3	OBC TESTV10		31,000.00	May 09, 2012	
COB0000007	CMICTEST3	OBC TESTV10		31,000.00	May 09, 2012	
COB0000008	CMICTEST3	OBC TESTV10		31,000.00	May 10, 2012	
COE0000001	WBS2	EXTERNAL		400,000.00	Mar 13, 2015	
COE0000001	1488395	RV TEST COE0000001		100,000.00	Jun 18, 2014	
COE0000001	CMICTEST3	May7.1		1,030.00	May 07, 2012	
COE0000001	GCMONITOR1	EXTERNAL		17,000.00	Jun 23, 2017	
COE0000001	91523M	120114		10,000.00	Dec 01, 2014	
COE0000001	CCC-6000	structon 11.62328		10,000.00	Jan 05, 2012	
COE0000001	MAX2	MAXIMUM TEST		2,200.00	May 12, 2015	
COE0000001	MPC1	EXTERNAL		0.00	May 08, 2016	
COE0000001	1498783	2233		2,500.00	Nov 10, 2014	
COE0000001	23456	external		3,750.00	Jan 01, 2014	
COE0000001	6789	ext		0.00	Jun 14, 2016	
COE0000001	CF001	Pending Change		0.00	Sep 18, 2014	
COE0000001	FORECAST3	FORECAST3		10,000.00	Apr 06, 2015	
COE0000001	MAX1	Unposted PCIs		3,000.00	May 08, 2015	
COE0000001	WIPOH1	external CO		0.00	Nov 29, 2016	
COE0000001	1508351	E		1,000.00	Jul 09, 2015	
COE0000001	SNAPSHOT	EXT		10,999.75	Jan 01, 2016	
COE0000001	WBS3	approved		7,500.00	Mar 27, 2015	
COE0000001	1500175	External		3,300.00	Dec 01, 2014	
COE0000001	JSP100	EXT		1,000.00	Jun 10, 2015	
COE0000001	RV20	EXTERN AL		0.00	May 12, 2015	
COE0000001	1491214-2	Test		7,718.00	Sep 30, 2014	
COE0000001	18.27083	external in OCT		10,111.00	Oct 01, 2016	
COE0000001	FCAST1	EXT		6,500.00	Jan 01, 2015	

This report lists Change Orders according to the entered report parameters.

Owner Change Order Report

		CCC - CMiC Test Construction Company				Page: 10 of 23	
		CHANGE MANAGEMENT - OWNER CHANGE ORDER LISTING				Date: Jan 17, 2018	
						Time: 7:06 PM EST	
<u>Owner Chg. Num.</u>	<u>Change Order</u>	<u>Description</u>	<u>Date</u>	<u>Amount</u>	<u>Status</u>	<u>Status Description</u>	
Customer ABSCONT - ABS Contractors Ltd							
Contractor 12345 - Project 12345 - Forecasting PMJSP							
Total For Contractor 12345				13,210,785.00			
Contractor 1486344 - 1486344 - Owner Change Order Document							
OCO							
	COI000001	test	Feb 17, 2015	0.00	PENDING	Pending	
Total For OCO				0.00			
OCO OCO-00000001							
	COE0000001	Demolition Labor	Jan 01, 2014	250,000.00	APPROVED	Approved	
Total For OCO OCO-00000001				250,000.00			
OCO OCO-00000002							
	COE0000002	External 2	Jan 05, 2014	40,000.00	APPROVED	Approved	
Total For OCO OCO-00000002				40,000.00			
OCO OCO-00000003							
	COE0000003	Owner Change Order	Jan 15, 2014	66,150.00	APPROVED	Approved	
Total For OCO OCO-00000003				66,150.00			
OCO OCO-00000004							
	COE0000004	Eligible Debris: Debris which is within the scope of this quotation falls under these possible classifications: Brush, Bulk Trash, Construction Waste, Containable Trash, Trash, Weeds, and Solid Wast	Oct 01, 2014	123,476.00	APPROVED	Approved	
	COE0000005	Non-Eligible Debris: Debris that is classified as Household Hazardous Waste, Hazardous Waste, Medical Wastes and Contaminated Materials are not to be transported by this quotation.	Oct 02, 2014	123,565.00	APPROVED	Approved	
	COE0000006	EQUIPMENT All trucks and other equipment must be in compliance with all applicable Federal, State and local rules and regulations.	Oct 03, 2014	166,865.00	APPROVED	Approved	
Total For OCO OCO-00000004				413,706.00			
Total For Contractor 1486344				769,856.00			
Contractor 1487331 - 1487331 - HUNTCG Issue for Contract Status Report							
OCO							

This report lists Owner Change Orders, sorted by Customers and Contractors.

Detailed PCI Report

CMiC		CCC - CMiC Test Construction Company										Page: 6 of 77					
CHANGE MANAGEMENT - DETAILED CHANGE ORDER REPORT												Date: Jan 17, 2018					
														Time: 7:11 PM EST			
Job	Phase	Cat	Billing			Cost Code			Budget			Subcontract					
Master Job			Code	Name	Invoice	Phase	Cat	Amount	Units	WM	Quantity	WM	Amount	Vendor	Contract	Chg	Stat
Project 12345 - Forecasting PMJSP																	
Type	EXT		External Change Orders	Reference Date	Oct 14, 2015		Owner Number				Billing Amt	141,000.00		Budget Amt	75,000.00		
			12345.02-200.8100	TEST111		02-200	8100.A	75,000.00	NA	1,000.00	NA	75,000.00	A1MARBLE	MARBLE1001	000	I	
			CFB														
			12345.02-200.CFB	TBD		02-200	CFB	66,000.00	NA	1,000.00	\$	0.00	TBD	TBD			
Change Order	COE0000006		EXTERNAL						Status	APPROVED	Approved			Unposted			
Type	EXT		External Change Orders	Reference Date	Oct 14, 2015		Owner Number				Billing Amt	85,000.00		Budget Amt	85,000.00		
			03-100														
			2000														
			12345.03-100.2000	TEST22		03-100	2000	85,000.00	NA	1,000.00	NA	85,000.00	A1DOORS	DOORS1001	000	I	
Change Order	COE0000007		TEST						Status	APPROVED	Approved			Unposted			
Type	EXT		External Change Orders	Reference Date	Oct 14, 2015		Owner Number				Billing Amt	22,222.00		Budget Amt	22,222.00		
			4000														
			12345.03-100.4000	TEST55		03-100	4000	22,222.00	NA	1,000.00	NA	22,222.00	A1HVAC	HVAC1001	000	I	
Change Order	COE0000008		ZERO BUDGET						Status	APPROVED	Approved			Unposted			
Type	EXT		External Change Orders	Reference Date	Oct 14, 2015		Owner Number				Billing Amt	333,333.00		Budget Amt	0.00		
			02-100														
			5000														
			12345.02-100.5000	Structural Demolition		02-100	5000	333,333.00	NA	1,000.00	LS	0.00	TBD	TBD			
Change Order	COE0000009		ext test						Status	APPROVED	Approved			Unposted			
Type	EXT		External Change Orders	Reference Date	Feb 22, 2016		Owner Number				Billing Amt	1,500.00		Budget Amt	0.00		
			01.03A.030000.F														
			CFB														
			12345.01.03 A.030000.F.CFB	T1		01.03A.030000	CFB	1,500.00	NA	20.00	\$	0.00	A1MARBLE	C009	000	I	
Change Order	COE0000010		update Phase Code						Status	APPROVED	Approved			Unposted			
Type	EXT		External Change Orders	Reference Date	Feb 01, 2016		Owner Number				Billing Amt	1,931,000.00		Budget Amt	0.00		
			02.03A.030000.F														

For each Job within the range of Jobs specified on the Report Parameters popup, this report provides details about each Job's Change Orders.

Owner Change Order Document (Forms Screen)

AIA DOCUMENT G701 - 2001		Page 1 of 1
Change Order		
PROJECT:(Name and address) Freshmart Office Building - Chicago II (J448957)	CHANGE ORDER NUMBER: OCO-0000001	OWNER <input type="checkbox"/>
	DATE:	ARCHITECT <input type="checkbox"/>
TO CONTRACTOR:(Name and address) CMiC Test Construction Company 4850 Keele Street West Ground Floor Annex 1 Singapore, FL , 32410 Singapore	ARCHITECT'S PROJECT NUMBER:	CONTRACTOR <input type="checkbox"/>
	CONTRACT DATE: 2017-MAR-16	FIELD <input type="checkbox"/>
	CONTRACT FOR: General Construction	OTHER <input type="checkbox"/>
THE CONTRACT IS CHANGED AS FOLLOWS: <i>(Include, where applicable, any undisputed amount attributable to previously executed Construction Change Directives.)</i>		
COI000006		\$0.00
COB0000001		\$0.00
The original Contract Sum was	\$	30,000.00
The net change by previously authorized Change Orders	\$	0.00
The Contract Sum prior to this Change Order was	\$	30,000.00
The Contract Sum will be changed by this Change Order in the amount of	\$	0.00
The new Contract Sum including this Change Order will be	\$	30,000.00
The Contract Time will be changed by		
The date of Substantial Completion as of the date of this Change Order therefore is		2018-DEC-31
NOTE : <i>This Change Order does not include changes in the Contract Sum, Contract Time or Guaranteed Maximum Price which have been authorized by Construction Change Directive until the cost and time have been agreed upon by both the Owner and Contractor, in which case a Change Order is executed to supersede the Construction Change Directive.</i>		
NOT VALID UNTIL SIGNED BY THE ARCHITECT, CONTRACTOR AND OWNER.		
ARCHITECT(Firm name)	CONTRACTOR(Firm name)	OWNER(Firm name)
	CMiC Test Construction Company 4850 Keele Street West Ground Floor Annex 1 Singapore, FL , 32410 Singapore	
ADDRESS	ADDRESS	ADDRESS
BY(Signature)	BY(Signature)	BY(Signature)
<i>(Typed name)</i>	<i>(Typed name)</i>	<i>(Typed name)</i>
DATE	DATE	DATE
CAUTION: You should sign an original AIA Contract Document, on which this text appears in RED. An original assures that changes will not be obscured.		
AIA Document G701™ – 2001. Copyright © 1979, 1987, 2000 and 2001 by The American Institute of Architects. All rights reserved.		
WARNING: This AIA® Document is protected by U.S. Copyright Law and International Treaties. Unauthorized reproduction or distribution of this AIA® Document, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.		
This document was produced at 12:50:38 on 01/18/2018 under Order No. LIC#12345678901234567890 which expires on 12/31/2020 ,and is not for resale.		
User Notes:		

Sample of AIA Document G701

This Forms screen is used to print the Owner Change Order Document, or the AIA® Document G701™ Change Order document if it has been enabled and licensed. If AIA Document G701 is enabled, the document printed has the “AIA Document G701” title and legal terms.

According to The American Institute of Architects’ website about the AIA Document G701:

AIA Document G701™-2017 is used for implementing changes in the work agreed to by the owner, contractor, and architect. Execution of a completed G701 indicates agreement upon all terms of the

change, including any changes in the contract sum (or guaranteed maximum price) and contract time. The form allows for signatures of the owner, architect and contractor, and for a description of the change.

The AIA Document G701- Change Order document is enabled on the **Invoice** tab of JB Control File, by using the following checkbox and fields (framed below): **AIA G702 And G703 Forms Licensed By Company, AIA License Number, AIA License Expiry Date.**

The screenshot shows the 'JB CONTROL' software interface. At the top, there is a 'Table Mode' button and icons for Save, Exit, and other functions. Below this is a 'SELECTION CRITERIA' section with a dropdown for 'Company' set to 'CCC' and a text field for 'CMIC Test Construction Company'. A 'Copy Control File' button is also present. The main section is 'JB CONTROL DETAIL' with tabs for 'General', 'Billing', 'Invoice', 'Department', and 'Risk Management'. The 'Invoice' tab is active, showing various fields: 'Default Invoice Format' (U11A), 'US AIA Type 11 Invoice', '* Self Performed Work' (JB1), 'Sub-Contracted Work', '* Self Performed Work Code' (INTERNAL), and 'Self Performed Work Description' (CMIC Test Construction Co). A red box highlights the 'AIA G702 And G703 Forms Licensed By Company' checkbox (checked), 'AIA License Number' (LIC#123456789012345678), and 'AIA License Expiry Date' (31/Dec/2020). There is also a 'Use Job Department For AR Posting' checkbox checked.

Report Parameters

The screenshot shows the 'Report Parameters' dialog box. At the top, there is a menu bar with 'Action', 'Edit', 'Block', 'Field', 'Record', 'Query', 'Utility', 'Help', and 'Window'. Below the menu bar is a toolbar with various icons. The main area is titled 'Print Parameters' and contains several fields: 'Company' (CCC), 'Project' (P448957), 'Customer' (FRSHMART), 'From Owner CO' (OCO-00000001), 'To Owner CO' (OCO-00000003), and 'Report Type' (Summary). There are also checkboxes for 'PCI Scope' (checked), 'Display PCI Notes' (unchecked), and 'Display OCO Notes' (unchecked). A 'Print' button is located at the bottom right. On the right side, there are two sections: 'User Extensions' with a '+' button and a list of 'User Extension1' through 'User Extension7' and 'More Extensions ...'; and 'Related Screens' with a '+' button and a list of 'Related Screen 1' through 'Related Screen 7' and 'More Related ...'.

Pgm: PMG701 – Owner Change Order Document

The report prints the Owner Change Order information in a summary or details format, as per the **Report Type** field, and prints the optional PCI Scope and PCI OCO notes as selected.

It must be noted that the “ARCHITECT” and “OWNER” name and address columns on the signature section of the report requires Project Roles defined exactly the same as given here. When these Project Roles are assigned to the Projects as Key Player Roles, the report prints the primary contact name of the project partner assigned to this Project, under these columns.

Company

Enter or select relevant Company.

Project

Enter or select a valid Project Code from the available LOV. The program defaults user's default CM/PM Project.

Customer

Display-only field. Defaults to the Customer from the Project.

From Owner CO

Enter or select a “From” Change Order Code, or leave blank to indicate first Change Order Code.

To Owner CO

Enter or select a “To” Change Order Code, or leave blank to indicate last Change Order Code

Report Type

Select detail level of the document: **Summary** or **Detail**.

PCI Scope – Checkbox

If checked, prints PCI+ Scope Descriptions.

If unchecked, prints PCI Descriptions.

Display PCI Notes – Checkbox

If checked, prints PCI Notes. Only Open Notes will be printed in descending sort order.

If unchecked, PCI Notes are not printed.

Display OCO Notes – Checkbox

If checked, prints OCO Notes. The single OCO Note will be printed at the end of the last PCI information.

If unchecked, OCO Notes are not printed.

Utilities

Change Batch Post Date

CHANGE BATCH POST DATE Save Exit ? ? ? ? ? ? ? ?

Enter The New Posting Date

SELECTION CRITERIA

* Application CM Change Management

* Company CCC CMIc Test Construction Company

* Batch Type Change Order

* Batch Number 19496 Change Order Posting 03 Jun, 2014 05:33

Current Post Date 03/Jun/2014

* New Posting Date 15/Jul/2014

Warnings **WARNING:** Changing Change Order Post Dates will not affect the previous assignment of that change order to a Job Billing Bill. If it needs to be removed, you must do it manually.

Update Post Date

Pgm: SYS_POST_DATE_CHANGE – Change Batch Post Date

This utility, which is also available in other modules, allows a new Batch Post Date to be applied to an already posted Batch. This will reverse the original posting and enter a new Post Date for the posted Change Orders, and where a Subcontract is assigned to a Change Order, the new Post Date is entered for the associated Subcontract also.

The new Batch will use the original posting Batch Number, and if multiple Post Dates are within the Batch, they will be changed to the new Post Date.

In Job Costing, there will be no recalculation of the projections.

To use this screen, users require the “PSTCHGCM” (Allow User to Change Post Dates on Change Orders) System Privilege assigned to their User ID or Security Role.

Application

Displays module for which this system wide utility was launched.

Company

Company under which Batch was created.

Batch Type

Select “**Change Order**”, as this system wide utility is only used to change Post Dates of Batches containing Change Orders.

Batch Number

Enter or select from the LOV the Batch Number that will be given a new Post Date.

Current Posting Date

Actual Post Date of Batch, which is to be changed. The current Post Date changes to the new Post Date after clicking [Update Post Date].

New Posting Date

Enter the new Post Date that will be applied to the selected Batch.

[Update Post Date] – Button

Click to apply new Post Date to Batch.

Change Batch Post Date Query

App	Batch	Batch Name	Type	Description	Old Post Date	New Post Date	Date Of Change	User	Name
CM	615	test feb23/2010	H	Change Order	23/Feb/2010	24/Feb/2010	23/Feb/2010	DA	Database Administrator
CM	680	Change Order Posting 08 Apr, 20	H	Change Order	08/Apr/2010	09/Apr/2010	12/Apr/2010	ANDYTESTV10	Andy Loney
CM	8379	VERYLOOOOOOOOOOOOOOOOOO	H	Change Order	07/Feb/2013	08/Feb/2013	07/Feb/2013	RAVI	Ravichandran Venkatachalam
CM	8039	JSP post: Job BASIC, PCI 003EXT, 0	H	Change Order	21/Dec/2012	24/Dec/2012	07/Jan/2013	SMUSER6	Glenda Stimpson
CM	7341	post PCI	H	Change Order	17/Oct/2012	27/Dec/2012	07/Jan/2013	SMUSER6	Glenda Stimpson

Pgm: *SYS_POST_DATE_CHANGE_QRY* – Changes Batch Post Date Query

A generic utility query is available providing an audit table for changed batch post dates. The query is available in all applications where the Changed Batch Post Date utility is available. AP, JC, SC, PY, PYC, CI, CM and PRM.

This generic query utility provides an audit table for changed Batch Post Dates, and it is available in the following modules: AP, JC, SC, PY, CI and PRM.

Print Posting Reports

* Batch	Name	* User	* Date
1476	test	STEPHANIE	25-May-2007
1033	post cm	STEPHANIE	31-Jan-2007
1012	2006-12 do not post without details	STEPHANIE	31-Jan-2007
1012	2006-12 do not post without details	LAGIBSON	20-Sep-2016
762	post pci	STEPHANIE	31-Jan-2007
745	post co with assigned sc - created in	STEPHANIE	30-Nov-2006
683	test	DA	31-Oct-2006
176	mike	DA	25-Jul-2006
172	0683454	YEVGENIA	05-Jul-2006
115	post co	STEPHANIE	30-Jun-2006
99	post change order	DA	14-Aug-2015
99	post change order	STEPHANIE	02-Jun-2006

Pgm: SYSRUN – Re-print Posting Reports

Use this utility to print posting reports for posted Batches within your system. Companies that post large volumes of data and do not want their system tied up during the day with printing processes most often use this utility. Often these companies will defer the printing of posting reports to the evening or the end of the day.

During the posting process, you can print your reports immediately by checking the **Print Reports Immediately** checkbox, or at a later time using this utility. If the posting reports are not printed during the posting process, you can return to this utility at a later time and select a range of posting reports that can be printed at one time.

The screen first displays all posting reports for the users default Company.

To print a posting report for a posted Batch, select it and click [**Print**].

Copy CM Tables

The screenshot shows the 'COPY SETUP' utility window. It has a dark blue header with the title 'COPY SETUP' and icons for Save, Exit, Help, and Refresh. Below the header, there is a section titled 'SELECTION CRITERIA' with a dropdown arrow. Under this section, there are two rows of input fields: 'From Company' with a dropdown menu showing 'CC' and a text field containing 'CMiC Construction'; and 'To Company' with a dropdown menu showing 'VBC' and a text field containing 'VB Construction'. Below these is a checked checkbox labeled 'Copy Control File' and a large empty text area for 'Status'. At the bottom of the form is a blue 'Process' button.

Pgm: CMCOPY – Copy Change Management Tables

This utility is used to copy the CM modules Local Tables (standard path: **Change Management > Local Tables**), and optionally the CM Control File, from one Company to another.

Import PCI

The screenshot shows the 'CHANGE ORDER IMPORT' utility window. It has a dark blue header with the title 'CHANGE ORDER IMPORT' and icons for Save, Exit, Help, and Refresh. Below the header, there is a section titled 'CHANGE ORDER IMPORT' with a dropdown arrow. Under this section, there are five buttons: 'Import File', 'Validate Imported Data', 'Edit Imported Data', 'Build Change Orders', and 'Delete Imported Data'. Below the buttons is a text area with the prompt 'Press button to select the action.' and a 'No imported records.' message.

Pgm: CMIMP – Change Order Import

The Import PCI utility is used to import Change Orders from a 3rd party software system into your CMiC system.

For details about importing Change Orders, please refer to the Imports user guide.

The following are basic details about this utility's buttons.

[Import File] – Button

Click to specify location of import file.

[Validate Imported Data] – Button

Click to validate imported data and report any errors.

[Edit Imported Data] – Button

This button's popup is used to edit the imported data and to make any necessary corrections.

[Build Change Orders] – Button

This button become available when all the imported records are error free, and it is used to import the error-free Change Orders for a specified Company.

PCI Basics – Quick Guide

Internal (In Scope)

Overview – Internal PCIs

PCIs of the Internal type only affect JC Budgets for Cost Codes and their Categories.

Enter PCI – Screen

General – Tab

The screenshot displays the 'Enter PCI' screen in 'Table Mode'. The top navigation bar includes 'Save', 'Exit', and other utility icons. The 'SELECTION CRITERIA' section contains dropdowns for 'Company' (CCC), 'Project' (P448957), and 'Contract' (J448957). The 'PCI INFORMATION' section includes a toolbar with 'Post', 'Owner CO', 'Copy', and 'Modify Type' buttons. Below this, the '* Type' field is set to 'INT' (Internal Change Orders) and the '* Status' field is set to 'PENDING'. The '* PCI NO.' is COI000004 and the description is 'SC A1MASONS-0002 - 10k Increase'. The 'Total Budgeted' and 'Total Billing' fields both show 0.00. The 'General' tab is active, showing fields for 'Allowance' (Neither), 'Source Type', 'Reason', 'Days Impact' (0), 'Owner CO#', and 'Scope Desc'. On the right side of the 'General' tab, there are date fields for 'Due to Owner' (08/Nov/2017), '* Date' (08/Nov/2017), 'Start Date', 'End Date', and 'Post Date'. A list of checkboxes is visible: 'Proceed' (checked), 'Forecast' (checked), 'Post Vendor Contracts with PCI' (checked), and 'Update Projected Amount during Posting' (checked). A 'Recalculate Projected Amount' button is also present. The 'Entered By' field is populated with 'Mike Fernandes'.

On the **General** tab of the Enter PCI screen, select “**INT**” via the **Type** field (Internal PCI type) and select its Approval Status via the **Status** field.

Detail – Tab (Parameters for PCI)

POTENTIAL CHANGE ITEMS Table Mode Save Exit

SELECTION CRITERIA
Company: CCC CMIC Test Construction Company
Project: P448957 Freshmart Office Building - Chicago II Contract: J448957 [Change Item Markup Rules](#)

PCI INFORMATION
Search Insert Delete Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type
* Type: INT Internal Change Orders * Status: PENDING Pending
* PCI NO.: COI000004 SC A1MASON5-0002 - 10k Increase Total Budgeted: 10,000.00 Total Billing: 0.00

General **Detail** Summary RFQ Approval Notes Attachment History
Show Rates Hide Rates Calc. Markups Allowance Tracking PCI Participation SCO Line Notes

View Freeze Detach Search **Insert** Insert Multiple Delete Workflows Report Options Export Attachments Notes ECM Documents

Vendor	Contract	* Job	* Cost Code	* Category	WM	Billing Code	Days Impact	Cost Code Qty	Cost Code WM	Estimated Amount	Quoted Amount	Final Amount	Billing Amount
A1MASONS	A1MASON-00	J448957	04 4000	S	LS		0	NA		10,000.00		10,000.00	10,000.00

Vendor Name: A1 Masons Cost Code Desc.: Masonry - Stone

Main Change Order Parameters

On the **Detail** tab, click the **[Insert]** button (framed above) and enter details for the following fields:

1. Vendor

Used if Cost Code & Category are handled by a Subcontract and you want to change Subcontract's value (use **Final Amount** field to specify change amount).

2. Contract (Subcontract)

Used if Cost Code & Category are handled by a Subcontract and you want to change Subcontract's value.

3. Job

Auto-populated with Project's associated Job.

4. Cost Code

Cost Code being updated.

5. Category

Category of the Cost Code being updated.

6. Final Amount

Enter the amount (positive/negative) of the change for the Bill Code's JC Budget Amount.

This field can also be auto-populated if rates and quantity fields are used. For details, please refer to the details about the **[Show Rates]** button for further details.

7. Billing Amount

Since this PCI is of the Internal type, which can only affect the JC Budget, no amount is entered in this field.

Applying PCI Line to Subcontract

There are 3 different ways to apply the PCI Line to a Subcontract:

1. Apply line to existing unposted Subcontract Change Order by selecting it from **Subcontract Change** field and entering a Task ID in the **Task ID** field.
2. Apply line to new Subcontract Change Order by manually entering Change Order Number. The Task ID will be automatically generated for you. The system will then prompt you to decide if you want to create the Change Order now or when the PCI is posted. To keep the manually entered number, you must select create now option. If you opt for when it is posted, the system will convert your manual numbering to “TBD”.
3. Apply the line to next available Subcontract Change Order by entering the code “TBD” (to be determined) in the **Subcontract Change** field and the Task ID in the **Task ID** field. The system will ask you if you want to create the Change Order now or when the PCI is posted.

Records & Fields Affected

Job Costing Budget

JC ENTER BUDGET
Save Exit Print Help ?

SELECTION CRITERIA

Company: CMIC Test Construction Company

Job: Freshmart Office Building - Chicago II

BUDGET DETAIL

View

* Cost Code	Cost Code Name	* Category	Meth	Budgeted Amount	Budgeted Quantity	WM	Budgeted Unit Rate	Budgeted Revenue Amount	Budgeted Revenue Rate	P	Projected Final	Freeze Pro Amt Flag
04 4000	Masonry - Stone	S	A	25,000.00	0.000	NA		21,000.00		L	25,000.00	<input type="checkbox"/>
08-100	Adjustment - Groups	CC	A			\$				L		<input type="checkbox"/>
08-100	Adjustment - Groups	CFB	A			\$				L		<input type="checkbox"/>
08-100	Adjustment - Groups	CFBNR	A			\$				L		<input type="checkbox"/>
08-100	Adjustment - Groups	L	A			NA				L		<input type="checkbox"/>

The **Budgeted Amount** and **Projected Final** fields in the JC Enter Budget screen are changed by the change amount for the Cost Code & Category.

Job Billing Contract

No change to the JB Contract, since the PCI was of the Internal type, which only affects JC Budgets.

Subcontract

Table Mode Save Exit ? ? ? ? ? ? ? ? ? ?
SUBCONTRACT MAINTENANCE

SELECTION CRITERIA

Company: CCC | CMIC Test Construction Company | Show Subcontracts: Open

Project: P448957 | Freshmart Office Building - Chicago II | Job Code: J448957 | Back

SUBCONTRACT INFORMATION

Search Insert Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Original Participation **Overall Participation** Compliance Joint Check Copy From Contract

* Vendor: A1MASONS | Vendor Name: A1 Masons

Contract: A1MASON-0002 | * Description: Exterior stone walkways, walls & curbs

Summary General Schedule of Values Change Orders Dates Text Codes Free Form Attachment Special Pricing Inclusions Exclusions

	Original	Changes To Date	Revised
Contract Value	15,000.00	10,000.00	25,000.00
Completion Date		0 Days	

Contract Type: Lump Sum | Default Retainage %: 10 | Do Not Exceed: []

* Status: POSTED | * Self Billed | Override Do Not Exceed Amount

The Subcontract's **Changes To Date** and **Revised** fields will be changed by the Change Order's change amount for the Cost Code & Category.

NOTE: A Subcontract's **Contract Value** is the JC Budget Amount (not JB Revenue Amount) for the Subcontract's SOV Lines.

Contract Forecasting – JSP

Cost Status Query – xProjects Screens

The following Cost Status Query screens are found under the following standard Treeview node: *xProjects > Budget & Cost Management*.

Cost Status Query

Cost Status Query																						
Job Code	Phase	Phase Name	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed Remaining	Committed	Spent/Committed	Amount To Complete	Calculated Projection	Proceeding Projected	Non-Proceeding CO	Pending Projection	Forecast	Projected Over/Under	Projected ETC Budget	
J448957	02-100	Structural Demolition	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	03 31 13	Heavy Weight Structural Concrete	1,218,500.00	10,000.00	0.00	1,228,500.00	0.00	0.00	1,228,500.00	0.00	0.00	0.00	0.00	1,228,500.00	1,228,500.00	0.00	0.00	1,228,500.00	1,228,500.00	0.00	1,228,500.00	
J448957	03-100	Structural Concrete	747,000.00	10,100.00	0.00	757,100.00	0.00	0.00	757,100.00	0.00	86,160.00	86,160.00	86,160.00	597,000.00	683,160.00	0.00	0.00	683,160.00	683,160.00	73,940.00	757,100.00	
J448957	03-200	Architectural Concrete	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
J448957	04 0500	Masonry	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,675.00	61,425.00	65,100.00	65,100.00	0.00	65,100.00	0.00	0.00	65,100.00	65,100.00	-65,100.00	0.00	
J448957	04 0510	Masonry - Mortar & Grout	15,000.00	0.00	0.00	15,000.00	0.00	0.00	15,000.00	0.00	0.00	0.00	0.00	15,000.00	15,000.00	0.00	0.00	15,000.00	15,000.00	0.00	15,000.00	
J448957	04 4000	Masonry - Stone	13,400.00	10,000.00	0.00	23,400.00	0.00	0.00	23,400.00	0.00	15,000.00	15,000.00	15,000.00	8,400.00	23,400.00	0.00	0.00	23,400.00	23,400.00	0.00	23,400.00	
J448957	08-100	Adjustment - Groups	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
J448957	08-200	Adjustment - Contract	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

As shown above, the **Internal And Transfer CO** field displays the accumulated amount of the change to the budgeted amount for the Cost Code. The other highlighted fields had their amounts changed accordingly.

Cost Status Query (Category)

Cost Status Query (Category)																						
Job Code	Phase	Phase Name	Category	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed	Committed Remaining	Spent/Committed	Amount To Complete	Calculated Projection	Proceeding Projected	Non-Proceeding CO	Pending Projection	Forecast	Projected Over/Under	Projected ETC Budget
J448957	04 4000	Masonry - Stone	INS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	04 4000	Masonry - Stone	S	15,000.00	10,000.00	0.00	25,000.00	0.00	0.00	25,000.00	0.00	15,000.00	15,000.00	15,000.00	10,000.00	25,000.00	0.00	0.00	25,000.00	25,000.00	0.00	25,000.00
J448957	08-100	Adjustment - Groups	CC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	08-100	Adjustment - Groups	CFB	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	08-100	Adjustment - Groups	CFBNR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	08-100	Adjustment - Groups	L	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

As shown above, the **Internal And Transfer CO** field displays the accumulated amount of the change to the budgeted amount for the Cost Code & Category. The other highlighted fields had their amounts changed accordingly.

Budget Status Query – xProjects Screens

No changes to the Budget Status Query screens in the xProjects module, since the PCI was of the Internal type, which only affects JC Budgets.

External (Owner/Out of Scope)

Overview – External PCIs

PCIs of the External type are used to change the JB Revenue Amounts for Cost Codes and their Categories. Optionally, the JC Budget Amount can also be changed for Cost Codes and their Categories.

Enter PCI – Screen

General – Tab

The screenshot displays the 'Enter PCI' screen in 'Table Mode'. The 'SELECTION CRITERIA' section includes fields for Company (CCC), Project (P448957), and Contract (J448957). The 'PCI INFORMATION' section shows the PCI Type as 'EXT' (External Change Orders) and Status as 'APPROVED'. The PCI number is COE0000003, and the description is '03 31 13.2000 10K Increase for extra concrete'. The 'General' tab is selected, showing fields for Allowance (Neither), Source, Reason, and various dates (Due to Owner, Date, Start Date, End Date) and checkboxes (Proceed, Forecast, Post Vendor Contracts with PCI, Update Projected Amount during Posting, Recalculate Projected Amount).

On the **General** tab of the Enter PCI screen, select “**EXT**” via the **Type** field (External PCI type) and select its Approval Status via the **Status** field.

Detail – Tab (Parameters for PCI)

POTENTIAL CHANGE ITEMS Table Mode Save Exit

SELECTION CRITERIA
Company: CCC CMIC Test Construction Company
Project: P448957 Freshmart Office Building - Chicago II Contract: J448957 Change Item Markup Rules

PCI INFORMATION
Search Insert Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions
Post Owner CO Copy Modify Type
* Type: EXT External Change Orders * Status: APPROVED Approved
* PCI NO.: COE0000003 03 31 13.2000 10K Increase for extra concrete Total Budgeted: 10,000.00 Total Billing: 15,000.00

General **Detail** Summary RFQ Approval Notes Attachment History
Show Rates Hide Rates Calc. Markups Allowance Tracking PCI Participation SCO Line Notes
View Freeze Detach Search Workflows Report Options Export Attachments Notes ECM Documents User Extensions

Vendor	Contract	* Job	* Cost Code	* Category	WM	Billing Code	Days Impact	Cost Code Qty	Cost Code WM	Estimate Amount	Quoted Amount	Final Amount	Billing Amount	Subcontract Change	Task ID	St
A1CEMEI	A1CEMEN-	J448957	03 31 13	2000	CY	J448957 03			NA	>	>	10,000.00	15,000.00	001	COE00C	AP
												10,000.00	15,000.00			

Vendor Name: A1 CEMENT INDUSTRIES. Cost Code Desc: Heavy Weight Structural Concrete

Main Change Order Parameters

On the **Detail** tab, click the **[Insert]** button (framed above) and enter details for the following fields:

1. Vendor

Used if Cost Code & Category are handled by a Subcontract, and you want to change Subcontract's value (use **Final Amount** field to specify change amount).

2. Contract (Subcontract)

Used if Cost Code & Category are handled by a Subcontract, and you want to change its value.

3. Job

Auto-populated with Project's associated Job.

4. Cost Code

Cost Code being updated.

5. Category

Category of the Cost Code being updated.

6. Final Amount

If the Bill Code's JC Budget Amount is to be changed, enter the amount (positive/negative) in this field.

If a new Bill Code is being added, enter its JC Budget Amount.

This field can also be auto-populated if rates and quantity fields are used. For details, please refer to the details about the **[Show Rates]** button for further details.

7. Billing Amount

Enter the amount (positive/negative) of the change for the Bill Code's JB Revenue Amount.

If a new Bill Code is being added, enter its JB Revenue Amount.

This field can also be auto-populated if rates and quantity fields are used. For details, please refer to the details about the [Show Rates] button for further details.

Applying PCI Line to Subcontract

If the Change Order is related to a Subcontract, there are 3 different ways to apply the PCI Line to it:

1. Apply line to existing unposted Subcontract Change Order by selecting it from **Subcontract Change** field and entering a Task ID in the **Task ID** field.
2. Apply line to new Subcontract Change Order by manually entering Change Order Number. The Task ID will be automatically generated for you. The system will then prompt you to decide if you want to create the Change Order now or when the PCI is posted. To keep the manually entered number, you must select create now option. If you opt for when it is posted, the system will convert your manual numbering to “TBD”.
3. Apply the line to next available Subcontract Change Order by entering the code “TBD” (To be determined) in the **Subcontract Change** field and the Task ID in the **Task ID** field. The system will ask you if you want to create the Change Order now or when the PCI is posted.

Records & Fields Affected

Job Costing Budget

JC ENTER BUDGET												
SELECTION CRITERIA												
Company		CCC	CMIC Test Construction Company									
Job		J448957	Freshmart Office Building - Chicago II									
											Create Contract	Assign Overhead Cost Rates
BUDGET DETAIL												
View Freeze Detach Search Workflows Report Options Export Import ECM Documents User Extensions												
* Cost Code	Cost Code Name	* Category	Meth	Budgeted Amount	Budgeted Quantity	WM	Budgeted Unit Rate	Budgeted Revenue Amount	Budgeted Revenue Rate	P	Projected Final	Freez Amt
03 31 13	Heavy Weight Structural Concrete	1500	A	145,000.00		HR		205,000.00		L	145,000.00	
03 31 13	Heavy Weight Structural Concrete	2000	U	22,000.00	0.000	CY		34,000.00		L	22,000.00	
03 31 13	Heavy Weight Structural Concrete	3000	A	235,000.00		DY		295,000.00		L	235,000.00	
03 31 13	Heavy Weight Structural Concrete	4000	A	75,000.00		LS		115,000.00		L	75,000.00	
03 31 13	Heavy Weight Structural Concrete	5000	A	67,500.00		LS		110,500.00		L	67,500.00	
03 31 13	Heavy Weight Structural Concrete	CC	A	150,000.00		\$		200,000.00		L	150,000.00	

The **Budgeted Revenue Amount** field for the Cost Code & Category is changed accordingly by the JB Original Budgeted Revenue change amount.

If a change for the JC Original Cost Budget was made, the **Budgeted Amount** and **Projected Final** fields for the Cost Code & Category are changed accordingly.

Job Billing Contract

CONTRACT ENTRY
Table Mode Save Exit

CREATE CONTRACT

* Company CMIC Test Construction Company

Use Sub-Contract Vendor on New Bill Lines
 Show Closed Contracts
 Show NR Bill Codes

CONTRACT INFORMATION

Billing Items Defaults Rounding Methods Address Description Officials Surcharges Risk Management Separate Billing Information Mapping Groups

Search Insert Delete Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Job

* Contract
* Contract Currency Contract Billing Type

* Customer

Budg. Billing Amt
 * Time Phased
 Exclude Non-Inv Receipts

Max Billing Amt

Bid Date
* Contract Date

Approved Date
Closed Date

Start Date
End Date

Spread Rule

Rate Code

Billing Codes

Group 1 Group 2 Group 3 Group 4 Group 5

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export Import ECM Documents User Extensions

Billing Code	* Type	Description	Budg. Billing Amt	Curr \$	Budg. Qty.	WM	Billing Rate	Max Billing Amt	Max Qty	% of Constr.
J448957 03 31 13 1000	COST	Heavy Weight Structural	295,000.00	US	0.000	HR				
J448957 03 31 13 2000	COST	Heavy Weight Structural	34,000.00	US	0.000	HR				
J448957 03 31 13 3000	COST	Heavy Weight Structural	295,000.00	US		DY				
J448957 03 31 13 4000	COST	Heavy Weight Structural	115,000.00	US		LS				

The **Budg. Billing Amt** field is changed by the change amount for the Cost Code & Category.

Subcontract

SUBCONTRACT MAINTENANCE
Table Mode Save Exit

SELECTION CRITERIA

Company CMIC Test Construction Company
 Show Subcontracts

Project Freshmart Office Building - Chicago II
 Job Code

SUBCONTRACT INFORMATION

Search Insert Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

* Vendor Vendor Name

Contract * Description

Summary General Schedule of Values Change Orders Dates Text Codes Free Form Attachment Special Pricing Inclusions Exclusions

	Original	Changes To Date	Revised
Contract Value	<input type="text" value="12,000.00"/>	<input type="text" value="10,000.00"/>	<input type="text" value="22,000.00"/>
Completion Date	<input type="text"/>	<input type="text" value="0 Days"/>	<input type="text"/>

Contract Type
Default Retainage % Do Not Exceed

* Status
 * Self Billed
 Override Do Not Exceed Amount

If the Change Order was related to a Subcontract, and it included a change for the JC Budget Amount for the Cost Code & Category being handled by the Subcontract, the Subcontract's **Changes To Date** and **Revised** fields will be updated accordingly.

NOTE: A Subcontract's **Contract Value** is the JC Budget Amount (not JB Revenue Amount) for the Subcontract's SOV Lines.

Contract Forecasting – JSP

Cost Status Query – xProjects Screens

The following Cost Status Query screens are found under the following standard Treeview node: *xProjects > Budget & Cost Management*.

Cost Status Query

Cost Status Query																					
Job Code	Phase	Phase Name	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed Remaining	Committed	Spent/Committed	Amount To Complete	Calculated Projection	Proceeding Projected	Non-Proceeding CO	Pending Projection	Forecast	Projected Over/Under	Projected ETC Budget
J448957	02-100	Structural Demolition	0.00	3,785.00	0.00	3,785.00	0.00	0.00	3,785.00	0.00	16,535.00	16,535.00	16,535.00	0.00	16,535.00	0.00	0.00	16,535.00	16,535.00	-12,750.00	3,785.00
J448957	03 31 13	Heavy Weight Structural Concrete	1,080,500.00	10,000.00	10,000.00	1,100,500.00	0.00	0.00	1,100,500.00	0.00	22,000.00	22,000.00	22,000.00	1,078,500.00	1,100,500.00	0.00	0.00	1,100,500.00	1,100,500.00	0.00	1,100,500.00
J448957	03-100	Structural Concrete	747,000.00	10,100.00	0.00	757,100.00	0.00	0.00	757,100.00	0.00	86,160.00	86,160.00	86,160.00	597,000.00	683,160.00	0.00	0.00	683,160.00	683,160.00	73,940.00	757,100.00
J448957	03-200	Architectural Concrete	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	04 0500	Masonry	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,675.00	61,425.00	65,100.00	65,100.00	0.00	65,100.00	0.00	0.00	65,100.00	65,100.00	-65,100.00	0.00

If the External Change Order included a change for the JC Budget Amount for the Cost Code, the **External CO** field is changed by the amount of the change to the budgeted cost amount for the Cost Code. The other highlighted fields are changed accordingly.

Cost Status Query (Category)

Cost Status Query (Category)																						
Job Code	Phase	Phase Name	Category Code	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed	Committed Remaining	Spent/Committed	Amount To Complete	Calculated Projection	Proceeding Projected	Non-Proceeding CO	Pending Projection	Forecast	Projected Over/Under	Projected ETC Budget
J448957	02-100	Structural Demolition	2000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10,000.00	10,000.00	10,000.00	0.00	10,000.00	0.00	0.00	10,000.00	10,000.00	-10,000.00	0.00
J448957	02-100	Structural Demolition	5000	0.00	3,785.00	0.00	3,785.00	0.00	0.00	3,785.00	0.00	6,535.00	6,535.00	6,535.00	0.00	6,535.00	0.00	0.00	6,535.00	6,535.00	-2,750.00	3,785.00
J448957	02-100	Structural Demolition	CC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	02-100	Structural Demolition	CFB	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	02-100	Structural Demolition	CFBNR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	03 31 13	Heavy Weight Structural Concrete	1000	220,000.00	10,000.00	0.00	230,000.00	0.00	0.00	230,000.00	0.00	0.00	0.00	0.00	230,000.00	230,000.00	0.00	0.00	230,000.00	230,000.00	0.00	230,000.00
J448957	03 31 13	Heavy Weight Structural Concrete	1500	145,000.00	0.00	0.00	145,000.00	0.00	0.00	145,000.00	0.00	0.00	0.00	0.00	145,000.00	145,000.00	0.00	0.00	145,000.00	145,000.00	0.00	145,000.00
J448957	03 31 13	Heavy Weight Structural Concrete	2000	12,000.00	0.00	10,000.00	22,000.00	0.00	0.00	22,000.00	0.00	22,000.00	22,000.00	22,000.00	0.00	22,000.00	0.00	0.00	22,000.00	22,000.00	0.00	22,000.00
J448957	03 31 13	Heavy Weight Structural Concrete	3000	235,000.00	0.00	0.00	235,000.00	0.00	0.00	235,000.00	0.00	0.00	0.00	0.00	235,000.00	235,000.00	0.00	0.00	235,000.00	235,000.00	0.00	235,000.00

If the External Change Order included a change for the JC Budget Amount for the Cost Code & Category, the **External CO** field is changed by the change amount to the budgeted cost amount for the Cost Code & Category. The other highlighted fields are changed accordingly.

Budget Status Query – xProjects Screens

The following Budget Status Query screens are found under the following standard Treeview node: *xProjects > Budget & Cost Management*.

Budget Status Query

Budget Status Query									
Job Code	Phase	Phase Name	Original Revenue Budget	Internal And Transfer CO	External CO	Current Revenue Budget	Pending CO	Prepending CO	Projected Revenue Budget
J448957	02-100	Structural Demolition	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	03 31 13	Heavy Weight Structural Concrete	1,495,500.00	0.00	35,000.00	1,530,500.00	0.00	0.00	1,530,500.00
J448957	03-100	Structural Concrete	1,080,000.00	0.00	100,000.00	1,180,000.00	0.00	0.00	1,180,000.00
J448957	03-200	Architectural Concrete	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	04 0500	Masonry	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	04 0510	Masonry - Mortar & Grout	23,500.00	0.00	0.00	23,500.00	0.00	0.00	23,500.00
J448957	04 4000	Masonry - Stone	53,500.00	0.00	0.00	53,500.00	0.00	0.00	53,500.00

As shown above, the **External CO** field is updated by the amount of the change to the budgeted amount for the Cost Code. The other highlighted fields are updated accordingly.

Budget Status Query (Category)

Budget Status Query (Category)											
Job Code	Phase	Phase Name	Category Code	Original Revenue Budget	Internal And Transfer CO	External CO	Current Revenue Budget	Pending CO	Prepending CO	Projected Revenue Budget	
J448957	02-100	Structural Demolition	CFBNR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
J448957	03 31 13	Heavy Weight Structural Concrete	1000	275,000.00	0.00	20,000.00	295,000.00	0.00	0.00	295,000.00	
J448957	03 31 13	Heavy Weight Structural Concrete	1500	205,000.00	0.00	0.00	205,000.00	0.00	0.00	205,000.00	
J448957	03 31 13	Heavy Weight Structural Concrete	2000	19,000.00	0.00	15,000.00	34,000.00	0.00	0.00	34,000.00	
J448957	03 31 13	Heavy Weight Structural Concrete	3000	295,000.00	0.00	0.00	295,000.00	0.00	0.00	295,000.00	
J448957	03 31 13	Heavy Weight Structural Concrete	4000	115,000.00	0.00	0.00	115,000.00	0.00	0.00	115,000.00	
J448957	03 31 13	Heavy Weight Structural Concrete	5000	110,500.00	0.00	0.00	110,500.00	0.00	0.00	110,500.00	

As shown above, the **External CO** field is updated by the amount of the change to the budgeted amount for the Cost Code, and the other highlighted fields are updated accordingly.

Transfer

Overview – Transfer PCIs

Transfer PCIs are used to transfer a JC Budget Amount and/or JB Budget Amount from one Bill Code to another.

If the **Transfer CI Budgeted Amount Must Be Balanced** and **Transfer CI Billing Amount Must Be Balanced** checkboxes on the CM Control file are checked, transfers of JC Budget and/or JB Revenue amounts must result in a zero net change.

NOTE: Only PCIs without an “**Approved**” status are available for transfers.

Enter PCI – Screen

General – Tab

The screenshot displays the 'Enter PCI' screen in the 'General' tab. The interface includes a header 'POTENTIAL CHANGE ITEMS' with a 'Table Mode' button and utility icons (Save, Exit, Print, Help, etc.). Below the header, there are sections for 'SELECTION CRITERIA' and 'PCI INFORMATION'. The 'SELECTION CRITERIA' section contains dropdown menus for Company (CCC), Project (P448957), and Contract (J448957), along with a 'Change Item Markup Rules' button. The 'PCI INFORMATION' section features a toolbar with icons for Search, Insert, Delete, Previous, Next, Workflows, Report Options, Attachments, Notes, ECM Documents, and User Extensions. Below the toolbar, there are buttons for Post, Owner CO, Copy, and Modify Type. The main data area shows fields for * Type (TFR), * Status (APPROVED), * PCI NO. (COT000001), and Trans. 26 0500.1000 to 26 0500.2000. Summary statistics include Total Budgeted (0.00) and Total Billing (0.00). At the bottom, there are tabs for General, Detail, Summary, RFQ, Approval, Notes, Attachment, and History. The 'General' tab is active, showing fields for Allowance (Neither), Source, Owner Allowance Amt, Due to Owner (10/Nov/2017), and Date (10/Nov/2017). Checkboxes for Proceed, Forecast, and Post Vendor Contracts with PCI are also visible.

On the **General** tab of the Enter PCI screen, select “**TFR**” via the **Type** field (Transfer PCI type) and select its Approval Status via the **Status** field.

Detail – Tab (Parameters for PCI)

POTENTIAL CHANGE ITEMS Table Mode Save Exit

SELECTION CRITERIA
 Company: CCC CMIC Test Construction Company
 Project: P448957 Freshmart Office Building - Chicago II Contract: J448957 Change Item Markup Rules

PCI INFORMATION
 Search Insert Delete Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type
 * Type: TFR Transfer Change Orders * Status: PENDING Pending
 * PCI NO.: COT000001 Trans. 26 0500.1000 to 26 0500.2000 Total Budgeted: 0.00 Total Billing: 0.00

General **Detail** Summary RFQ Approval Notes Attachment History

Show Rates Hide Rates Calc.Markups Allowance Tracking PCI Participation SCO Line Notes

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export Attachments Notes ECM Documents User Extensions

Vendor	Contract	* Job	* Cost Code	* Category	WM	Billing Code	Days Impact	Cost Code Qty	Cost Code WM	Estimated Amount	Quoted Amount	Final Amount	Billing Amount	Subcontract Change	Task ID	Status
A1ELEC	A1ELEC-0005	J44895	26 0500	2000		J448957.26 05			NA			-10,000.00	-15,000.00	TBD	COT000001	PENDING
		J448957	26 0500	1000	HR	J448957.26 051			NA			10,000.00	15,000.00			PENDING
												0.00	0.00			

Vendor Name: A1ELECTRIC Company Cost Code Desc: Electrical

transfer Cost & Budget amounts from one Bill Code to another

Main Change Order Parameters

On the **Detail** tab, click the **[Insert]** button (framed above) and enter details for the following fields:

1. Vendor

Used if Cost Code & Category are handled by a Subcontract.

2. Contract (Subcontract)

Used if Cost Code & Category are handled by a Subcontract.

3. Job

Auto-populated with Project's associated Job.

4. Cost Code

Cost Code from which the transfer amount is either being taken or added.

5. Category

Category from which the transfer amount is either being taken or added.

6. Final Amount

Bill Code's JC Budget Amount: if the transfer amount is being taken from this Bill Code, enter the negative amount; otherwise, enter the positive amount.

7. Billing Amount

Bill Code's JB Revenue Amount. If the transfer amount is being taken from this Bill Code, enter the negative amount; otherwise, enter the positive amount.

Applying PCI Line to Subcontract

If the Change Order is related to a Subcontract, there are 3 different ways to apply the PCI Line to it:

1. Apply line to existing unposted Subcontract Change Order by selecting it from **Subcontract Change** field and entering a Task ID in the **Task ID** field.

2. Apply line to new Subcontract Change Order by manually entering Change Order Number. The Task ID will be automatically generated for you. The system will then prompt you to decide if you want to create the Change Order now or when the PCI is posted. To keep the manually entered number, you must select create now option. If you opt for when it is posted, the system will convert your manual numbering to "TBD".
3. Apply the line to next available Subcontract Change Order by entering the code "TBD" (To be determined) in the **Subcontract Change** field and the Task ID in the **Task ID** field. The system will ask you if you want to create the Change Order now or when the PCI is posted.

Records & Fields Affected

Job Costing Budget

JC ENTER BUDGET													
SELECTION CRITERIA													
Company		CMIC Test Construction Company											
Job		Freshmart Office Building - Chicago II											
											Create Contract	Assign Overhead Cost Rates	
BUDGET DETAIL													
View Freeze Detach Search Workflows Report Options Export Import ECM Documents User Extensions													
* Cost Code	Cost Code Name	* Category	Meth	Budgeted Amount	Budgeted Quantity	WM	Budgeted Unit Rate	Budgeted Revenue Amount	Budgeted Revenue Rate	P	Projected Final	Freeze Proj Amt Flag	Time Phased
26 0500	Electrical	1000	A	90,000.00	0.000	HR		145,000.00		L	90,000.00	<input type="checkbox"/>	<input type="checkbox"/>
26 0500	Electrical	2000	A	15,000.00	0.000	CY		20,000.00		L	15,000.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
26 0500	Electrical	3000	A			HR				L		<input type="checkbox"/>	<input type="checkbox"/>
26 0500	Electrical	4000	A			CY				L		<input type="checkbox"/>	<input type="checkbox"/>
26 0500	Electrical	5000	A			CY				L		<input type="checkbox"/>	<input type="checkbox"/>
26 0500	Electrical	CC	A			\$				L		<input type="checkbox"/>	<input type="checkbox"/>
26 0500	Electrical	CFB	A			\$				L		<input type="checkbox"/>	<input type="checkbox"/>

If the Transfer Change Order included changes for the JC Budget Amount for the Cost Codes & Category, the **Budgeted Amount** and **Projected Final** fields are changed accordingly.

If the Transfer Change Order included changes for the JB Original Budgeted Revenue Amount, the **Budgeted Revenue Amount** field is changed accordingly.

Job Billing Contract

Table Mode Save Exit

CREATE CONTRACT
 * Company CMIC Test Construction Company

[JB - Assign Billing Codes to a Contract](#)
[JB - Assign Billing Codes to Cost Phase/Categories](#)
[JB - Billing Rates](#)

CONTRACT INFORMATION

[Billing Items](#)
[Defaults](#)
[Rounding Methods](#)
[Address](#)
[Description](#)
[Officials](#)
[Surcharges](#)
[Risk Management](#)
[Separate Billing Information](#)
[Mapping Groups](#)

Job
 * Contract * Contract Currency Contract Billing Type
 * Customer
 Budg. Billing Amt Time Phased Exclude Non-Inv Receipts
 Max Billing Amt
 Bid Date * Contract Date
 Approved Date Closed Date Spread Rule
 Start Date End Date Rate Code

[Create Contract Details](#)
[Bill Rates](#)
[Add New Bill Codes](#)
[Reset All Bill Code Budgets](#)
[Default Compliance Codes](#)
[Invoice Preview](#)

Billing Codes [Group 1](#) [Group 2](#) [Group 3](#) [Group 4](#) [Group 5](#)

Billing Code	* Type	Description	Budg. Billing Amt	Curr \$	Budg. Qty.	WM	Billing Rate	Max Billing Amt	Max Qty	% of Constr.	Construction Value
J448957.26 0500.1000	COST	Electrical - Labour	145,000.00	US	0.000	HR					
J448957.26 0500.2000	COST	Electrical - Subcontract	20,000.00	US	0.000	CY					
J448957.26 0500.3000	COST	Electrical - Equipment		US		HR					

The **Budg. Billing Amt** fields are changed by the transfer amounts for the Cost Codes & Categories.

Subcontract

Table Mode Save Exit

SELECTION CRITERIA
 Company CMIC Test Construction Company Show Subcontracts
 Project Job Code [Back](#)

SUBCONTRACT INFORMATION

[Post](#)
[Original Participation](#)
[Overall Participation](#)
[Compliance](#)
[Joint Check](#)
[Copy From Contract](#)

* Vendor
 Contract * Description

[Summary](#)
[General](#)
[Schedule of Values](#)
[Change Orders](#)
[Dates](#)
[Text Codes](#)
[Free Form](#)
[Attachment](#)
[Special Pricing](#)
[Inclusions](#)
[Exclusions](#)

	Original	Changes To Date	Revised
Contract Value	<input type="text" value="25,000.00"/>	<input type="text" value="-10,000.00"/>	<input type="text" value="15,000.00"/>
Completion Date	<input type="text"/>	<input type="text" value="0 Days"/>	<input type="text"/>

Contract Type Default Retainage % Do Not Exceed
 * Status Self Billed Override Do Not Exceed Amount

If the Transfer Change Order was related to a Subcontract, and it included a change for the JC Budget Amount for the Cost Code & Category being handled by the Subcontract, the Subcontract's **Changes To Date** and **Revised** fields will be updated accordingly.

NOTE: A Subcontract's **Contract Value** is the JC Budget Amount (not JB Revenue Amount) for the Subcontract's SOV Lines.

Contract Forecasting – JSP

Cost Status Query (Category) – xProjects Screens

Cost Status Query (Category)																						
Job Code	Phase	Phase Name	Category Code	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed	Committed Remaining	Spent/Committed	Amount To Complete	Calculated Projection	Proceeding Projected	Non-Proceeding CO	Pending Projection	Forecast	Projected Over/Under	Projected ETC Budget
J448957	26 0500	Electrical	1000	80,000.00	10,000.00	0.00	90,000.00	0.00	0.00	90,000.00	0.00	0.00	0.00	0.00	90,000.00	90,000.00	0.00	0.00	90,000.00	90,000.00	0.00	90,000.00
J448957	26 0500	Electrical	2000	25,000.00	-10,000.00	0.00	15,000.00	0.00	0.00	15,000.00	0.00	15,000.00	15,000.00	15,000.00	0.00	15,000.00	0.00	0.00	15,000.00	15,000.00	0.00	15,000.00
J448957	26 0500	Electrical	3000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	26 0500	Electrical	4000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	26 0500	Electrical	5000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	26 0500	Electrical	CC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	26 0500	Electrical	CFB	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	26 0500	Electrical	CFBHR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

If the Transfer Change Order included a change for the JC Budget Amount for the Cost Codes & Categories, the **Internal And Transfer CO** fields and the other highlighted fields are changed accordingly.

Budget Status Query (Category) – xProjects Screens

Budget Status Query (Category)											
Job Code	Phase	Phase Name	Category Code	Original Revenue Budget	Internal And Transfer CO	External CO	Current Revenue Budget	Pending CO	Prepending CO	Projected Revenue Budget	
J448957	26 0500	Electrical	1000	130,000.00	15,000.00	0.00	145,000.00	0.00	0.00	145,000.00	
J448957	26 0500	Electrical	2000	35,000.00	-15,000.00	0.00	20,000.00	0.00	0.00	20,000.00	
J448957	26 0500	Electrical	3000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
J448957	26 0500	Electrical	4000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
J448957	26 0500	Electrical	5000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
J448957	26 0500	Electrical	CC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

If the Transfer Change Order included a change for the JC Budget Amount for the Cost Codes & Categories, the **Internal And Transfer CO** fields and the other highlighted fields are changed accordingly.

Original Budget

Overview – Original Budget PCIs

PCIs of the Original Budget type are used to change a Cost Code and Category's JC Original Cost Budget Amount and/or JB Original Revenue Amount, if the Job has been started using the Start Job screen (program: JCJOB DAT; standard path: **JC > Job > Start Job**):

1. JC Original Cost Budget Amount

Cost Status Query (Category)															
Job Code	Phase	Phase Name	Category Code	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed	Committed Remaining	Spent/Comm	
J448957	26 0500	Electrical	1000	80,000.00	10,000.00	0.00	90,000.00	0.00	0.00	90,000.00	0.00	0.00	0.00	0.00	0
J448957	26 0500	Electrical	2000	25,000.00	-10,000.00	0.00	15,000.00	0.00	0.00	15,000.00	0.00	15,000.00	15,000.00	15,000	0
J448957	26 0500	Electrical	3000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0

Sample of Cost Status Query (Category) screen; standard path: xProjects > Budget & Cost Management > Cost Status Query (Category)

Detail – Tab (Parameters for PCI)

POTENTIAL CHANGE ITEMS Table Mode Save Exit

SELECTION CRITERIA
 Company: CCC CMIC Test Construction Company
 Project: P448957 Freshmart Office Building - Chicago II Contract: J448957 Change Item Markup Rules

PCI INFORMATION
 Search Insert Delete Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type
 * Type: OBC Original Budget Change Orders * Status: PENDING Pending
 * PCI NO: COB0000003 26 0500 - Cost Increase \$20K Rev. Inc & Rev. Increase \$30K Total Budgeted: 0.00 Total Billing: 0.00

General **Detail** Summary RFQ Approval Notes Attachment History
 Show Rates Hide Rates Calc. Markups Allowance Tracking PCI Participation SCO Line Notes

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export Attachments Notes ECM Documents User Extensions

Vendor	Contract	* Job	* Cost Code	* Category	WM	Billing Code	Days Impact	Cost Code Qty	Cost Code WM	Estimated Amount	Quoted Amount	Final Amount	Billing Amount	Subcontract Change	Task ID	Status Code
		J448957	26 0500	1000	HR	J448957.26 05	0					20,000.00	30,000.00			PENDING
												20,000.00	30,000.00			

Vendor Name: Cost Code Desc: Electrical

Main Change Order Parameters

On the **Detail** tab, click the **[Insert]** button (framed above) and enter details for the following fields:

1. Job

Auto-populated with Project’s associated Job.

2. Cost Code

Cost Code being updated.

3. Category

Category of the Cost Code being updated.

4. Final Amount

If the Bill Code’s JC Original Cost Budget Amount (displayed by Cost Status Query screen, as shown below) is to be changed, enter the amount in this field.

Job Code	Phase	Phase Name	Category Code	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed	Committed Remaining	Spent/Comm
J448957	26 0500	Electrical	1000	80,000.00	10,000.00	0.00	90,000.00	0.00	0.00	90,000.00	0.00	0.00	0.00	0
J448957	26 0500	Electrical	2000	25,000.00	-10,000.00	0.00	15,000.00	0.00	0.00	15,000.00	0.00	15,000.00	15,000.00	15,000
J448957	26 0500	Electrical	3000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0

5. Billing Amount

If the Bill Code’s JB Original Revenue Budget Amount (displayed by Budget Status Query screen, as shown below) is to be changed, enter the amount in this field.

Job Code	Phase	Phase Name	Category Code	Original Revenue Budget	Internal And Transfer CO	External
J448957	26 0500	Electrical	1000	130,000.00		15,000.00
J448957	26 0500	Electrical	2000			-15,000.00
J448957	26 0500	Electrical	3000			0.00

Records & Fields Affected

Job Costing Budget

* Cost Code	Cost Code Name	* Category	Meth	Budgeted Amount	Budgeted Quantity	WM	Budgeted Unit Rate	Budgeted Revenue Amount	Budgeted Revenue Rate	P	Projected Final	Freeze Proj Amt Flag	Time Phased	Spread Rule
09-999	Contractor Default Insurance	CFBNR	A			\$				L		<input type="checkbox"/>	<input type="checkbox"/>	
26 0500	Electrical	1000	A	110,000.00	0.000	HR		175,000.00		L	110,000.00	<input type="checkbox"/>	<input type="checkbox"/>	
26 0500	Electrical	2000	A	15,000.00	0.000	CY		20,000.00		L	15,000.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
26 0500	Electrical	3000	A			HR				L		<input type="checkbox"/>	<input type="checkbox"/>	
26 0500	Electrical	4000	A			CY				L		<input type="checkbox"/>	<input type="checkbox"/>	

If a change for the JC Original Cost Budget was made, the **Budgeted Amount** and **Projected Final** fields for the Cost Code & Category are changed accordingly.

If a change for the JB Original Budgeted Revenue was made, the **Budgeted Revenue Amount** field is changed accordingly.

Job Billing Contract

Billing Code	* Type	Description	Budg. Billing Amt	Curr \$	Budg. Qty.	WM	Billing Rate	Max Billing Amt	Max Qty	% of Constr.	Construction Value
J448957.26 0500.1000	COST	Electrical - Labour	175,000.00	US	0.000	HR					J448957
J448957.26 0500.2000	COST	Electrical - Subcontract	20,000.00	US	0.000	CY					J448957
J448957.26 0500.3000	COST	Electrical - Equipment		US		HR					J448957
J448957.26 0500.4000	COST	Electrical - Material		US		CY					J448957

If a change for the JB Original Revenue Budget was made, the **Budg. Billing Amt** field is changed by the change amount for the Cost Code & Category.

Subcontract

Subcontracts are not changed by Original Budget PCIs.

Contract Forecasting – JSP

Cost Status Query – xProjects Screens

The following Cost Status Query screens are found under the following standard Treeview node: *xProjects* > *Budget & Cost Management*.

Cost Status Query

Cost Status Query																				
Job Code	Phase	Phase Name	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed Remaining	Committed	Spent/Committed	Amount To Complete	Calculated Projection	Proceeding Projected	Non-Proceeding CO	Pending Projection	Forecast	Projected Over/Under
J448957	09-999	Contractor Default Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	26 0500	Electrical	125,000.00	0.00	0.00	125,000.00	0.00	0.00	125,000.00	0.00	15,000.00	15,000.00	15,000.00	110,000.00	125,000.00	0.00	0.00	125,000.00	125,000.00	0.00
J448957	26 0900	Electrical - Instrumentation & Controls	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

If a change for the JC Original Cost Budget was made for the Cost Code, its **Original Budget** field (only changeable via Original Budget PCIs) and the other highlighted fields are changed accordingly.

Cost Status Query (Category)

Cost Status Query (Category)																					
Job Code	Phase	Phase Name	Category Code	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed	Committed Remaining	Spent/Committed	Amount To Complete	Calculated Projection	Proceeding Projected	Non-Proceeding CO	Pending Projection	Forecast	Projected Over/Under
J448957	09-999	Contractor Default Insurance	CFBNR	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	26 0500	Electrical	1000	100,000.00	10,000.00	0.00	110,000.00	0.00	0.00	110,000.00	0.00	0.00	0.00	0.00	110,000.00	110,000.00	0.00	0.00	110,000.00	110,000.00	0.00
J448957	26 0500	Electrical	2000	25,000.00	-10,000.00	0.00	15,000.00	0.00	0.00	15,000.00	0.00	15,000.00	15,000.00	15,000.00	0.00	15,000.00	0.00	0.00	15,000.00	15,000.00	0.00
J448957	26 0500	Electrical	3000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	26 0500	Electrical	4000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

If a change for the JC Original Cost Budget was made for the Cost Code & Category, its **Original Budget** field (only changeable via Original Budget PCIs) and the other highlighted fields are changed accordingly.

Budget Status Query – xProjects Screens

The following Budget Status Query screens are found under the following standard Treeview node: *xProjects* > *Budget & Cost Management*.

Budget Status Query

Budget Status Query										
Job Code	Phase	Phase Name	Original Revenue Budget	Internal And Transfer CO	External CO	Current Revenue Budget	Pending CO	Prepending CO	Projected Revenue	
J448957	09-999	Contractor Default Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
J448957	26 0500	Electrical	195,000.00	0.00	0.00	195,000.00	0.00	0.00	0.00	
J448957	26 0900	Electrical - Instrumentation & Controls	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
J448957	26 1000	Electrical - Power Distribution	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

If a change for the JB Original Revenue Budget was made for the Cost Code & Category, its **Original Revenue Budget** field (only changeable via Original Budget PCIs) and the other highlighted fields are changed accordingly.

Budget Status Query (Category)

Budget Status Query (Category)										
Job Code	Phase	Phase Name	Category Code	Original Revenue Budget	Internal And Transfer CO	External CO	Current Revenue Budget	Pending CO	Prepending CO	Projected Revenue
J448957	09-999	Contractor Default Insurance	CFBNR	0.00	0.00	0.00	0.00	0.00	0.00	0.00
J448957	26 0500	Electrical	1000	180,000.00	15,000.00	0.00	175,000.00	0.00	0.00	0.00
J448957	26 0500	Electrical	2000	35,000.00	-15,000.00	0.00	20,000.00	0.00	0.00	0.00
J448957	26 0500	Electrical	3000	0.00	0.00	0.00	0.00	0.00	0.00	0.00

If a change for the JB Original Revenue Budget was made for the Cost Code & Category, its **Original Revenue Budget** field (only changeable via Original Budget PCIs) and the other highlighted fields are changed accordingly.

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