

## REST (Real Estate Systems Training)



## Document Revision History

Date	Version	Description
02/27/2018	0.1	Draft
08/16/2018	1.0	Publish
01/21/2019	2.0	Updated to include project date changes
03/31/2020	3.0	Updated screenshots to eliminate sensitive information.
11/11/2020	3.1	Updated to clarify importance of clicking <b>Submit to Buyer</b> button
02/12/2021	3.2	Updated to include instructions for adding messages and attachments
06/17/2021	3.3	Added information about the 240-character limit for the <b>Description</b> field
10/13/2021	3.4	Updated to reflect rejection notification to supplier and ability to request an attachment be added to the PO.
01/11/2022	3.5	Updated to include how to view <b>Accepted</b> and <b>UnAccepted</b> items.
11/14/2022	3.6	Updated to include details about expired BPA.

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## Overview

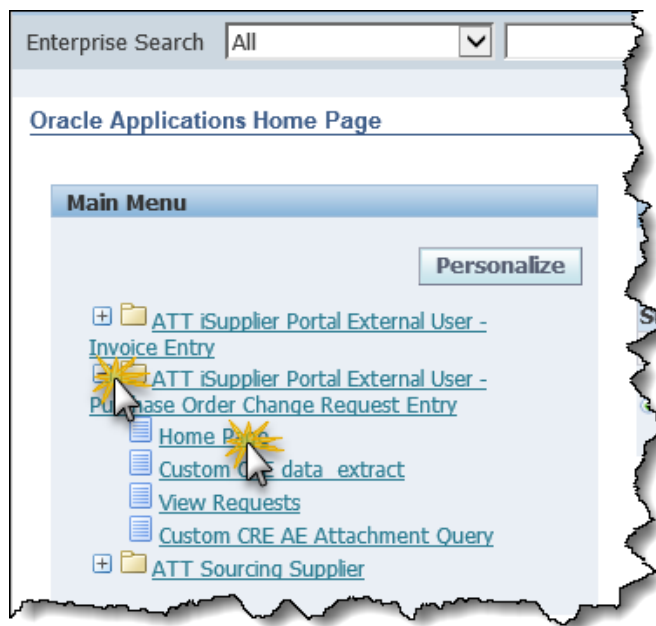
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A supplier with an authorized change order role can create a change order via the iSupplier portal and submit to a buyer for approval. The buyer will receive a notification that a change order has been submitted. The buyer cannot act on the change order until the supplier submits it.

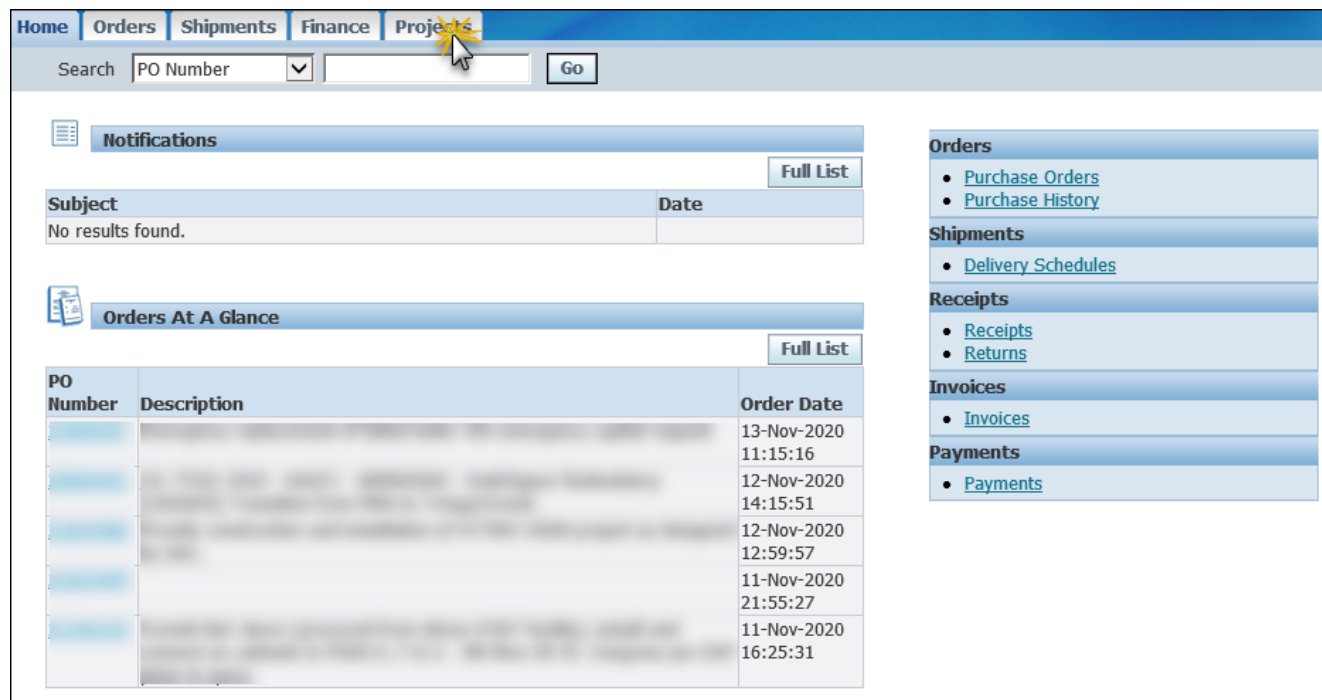
- Change orders can only be initiated by the supplier if a fee structure is in place for the master agreement. If one is not in place or if the purchase order is created outside of an agreement, the buyer must initiate the change.
- The purchase order must have a fee option used upon creation of the PO. If the PO was created without an authorized fee option, the buyer must make changes directly on the PO themselves.
- The PO must be in **Approved** status. If the PO is not approved, the supplier will not be able to create a change order.
- The BPA (blanket purchase agreement) must be active for the supplier to create a change order and for the buyer to approve the change order.
- Only one change order may be processed at a time. Multiple change orders are not allowed.
- While a change order is in a status of **In Process**, a supplier cannot make modifications to it.

## Steps

1. Log into Oracle.
2. Expand the **ATT iSupplier Portal External User – Purchase Order Change Request Entry** folder.
3. Select **Home Page** from the **Main Menu**.




4. The **iSupplier Portal** is displayed. Click the **Projects** tab.








## Search for the Purchase Order

1. The **Project Drilldown Details** window is displayed. Search for the desired purchase order by entering it in the **Purchase Order** field of the **Project Drilldown Details** section or by using any of the additional search fields provided. You may have to clear other auto-populated fields (i.e. **Activity** fields).
2. Click **Go** to execute the search.
3. Click the **PO** tab.

The screenshot shows the 'Project Drilldown Details' window. At the top, there are tabs: Home, Orders, Shipments, Finance, and Projects. Below the tabs, there are several search fields: REM CRE Project Number, REM CRE Project Manager, REM CRE Project Status, GEOLOC, RFQ Number, RFQ Reference Number, Purchase Order, Last Activity - From, and Last Activity - To. A 'Go' button and a 'Clear' button are located below the search fields. The 'Go' button is highlighted with a yellow starburst icon. Below the search fields, there are tabs: Projects, RFQ, and PO. The 'PO' tab is highlighted with a yellow starburst icon. Below the tabs, there is a section titled 'RemCre Project Details' with a table showing project details.

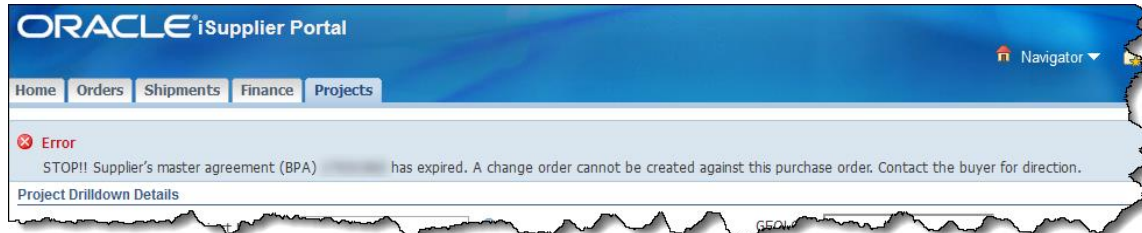
4. The system displays a list of all purchase orders assigned to your company. Click  (**Create CO**) to the right of the purchase order. Only approved POs will have the icon enabled.

The screenshot shows the 'CRE PO Details' window. At the top, there are tabs: Home, Orders, Shipments, Finance, and Projects. Below the tabs, there are several search fields: REM CRE Project Number, REM CRE Project Manager, REM CRE Project Status, GEOLOC, RFQ Number, RFQ Reference Number, Purchase Order, Last Activity - From, and Last Activity - To. A 'Go' button and a 'Clear' button are located below the search fields. Below the search fields, there are tabs: Projects, RFQ, and PO. The 'PO' tab is highlighted. Below the tabs, there is a section titled 'CRE PO Details' with a table showing purchase order details. The table has columns: PO#, Description, Project# Name, Supplier Site, Buyer, Supplier Contact, Creation Date, Total Amount, Status, and Create CO. The 'Create CO' column contains a yellow starburst icon for each row. The icon is highlighted with a red box.

PO#	Description	Project# Name	Supplier Site	Buyer	Supplier Contact	Creation Date	Total Amount	Status	Create CO
			02			13-Jun-2019		APPROVED	
			02			13-Jun-2019		APPROVED	
			02			14-May-2019		APPROVED	
			02			13-Jun-2019		APPROVED	
			02			22-Jul-2020		APPROVED	

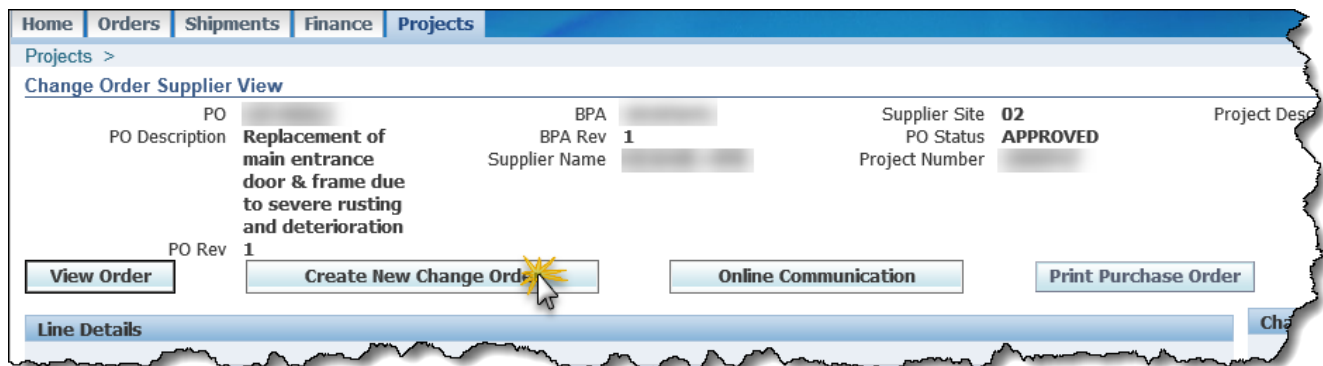


**Important!** You cannot create a change order on a purchase order with an expired agreement. If you attempt to do so, the system displays the following error message:




## Create Change Order

1. The **Change Order Supplier View** window is displayed. Click **Create New Change Order**. The button is only available if the purchase order is in a status of **Approved**. Only click the button once.



2. Click the radio button next to the service line to be modified. The fee options associated with the PO display in the **Change Request** section. If you will be making changes to multiple services lines, you'll take care of one service line at a time.

3. Click the magnifying glass next to fee option and click  next to the appropriate fee structure (only applicable if more than one was added).

**Line Details**

Select	Line#	Line Description	Category	Amount	Fee Option	Status
	1		CRE.DEFAULT.GENERAL.CONSTRUCTION		Cost Plus Full Mgmt Fee	


**Change Request**

Fee Option : Cost Plus Full Mgmt Fee 

## Cost Changes

1. Click **Add a Row** in the **Change Request** section.


**Change Request**

Fee Option : Cost Plus Full Mgmt Fee 

**Changed Costs Break-up**

Previous 1-10 of 14 Next 4

CostElements	Fees
Direct Cost	0.00
GC Direct Cost	0.00
General Conditions	0.00
Management Fee	0.00
Profit	0.00
Cost Plus Fee	0.00
Other Fee	0.00
Other Costs	0.00

Select Item#	Description	Amount	Buyer Acceptance?	Creation Date	ApprovalDate
No results found.					
					
<b>Add a Row</b>	<b>Delete</b>	<b>Total</b>	<b>0</b>		

2. A blank row is added to your screen. List the **Item#**, **Description** (reason for the change, enter up to 240 characters), and **Amount** in the fields provided.

[Select All](#) | [Select None](#)

Select Item#	Description	Amount	Buyer Acceptance?	Creation Date	ApprovalDate
<input type="checkbox"/> 1	Change in Schedule Fees	450.00	N	11-Feb-2021	
<b>Add a Row</b>	<b>Delete</b>	<b>Recalculate</b>	<b>Total</b>	<b>0</b>	

3. Click **Recalculate**.
4. Repeat steps 1-2 if an added cost breakdown is required. Click **Recalculate** after each added row. The fees will feed into the **Changed Costs Break-up** section to the right.

Fee Option : Cost Plus Fee Mgmt Fee

Select All | Select None

Select Item#	Description	Amount	Buyer Acceptance?	Creation Date	Approval Date
<input type="checkbox"/> 1	Change in Schedule Fees	450	N	11-Feb-2021	
<a href="#">Add a Row</a> <a href="#">Delete</a> <a href="#">Recalculate</a>		Total	450		

Changed Costs Break-up

Previous 1-10 of 14 Next 4

CostElements	Fees
Direct Cost	450.00
GC Direct Cost	23.40
General Conditions	0.00
Management Fee	0.00
Profit	0.00
Cost Plus Fee	22.72
Other Fee	0.00
Other Costs	0.00
Project Cost	496.12
Renovation Tax	0.00

Previous 1-10 of 14 Next 4



**Important!** If multiple items/rows are included in the change order, the Buyer will have the ability to **Accept** or **UnAccept** the individual items/rows.

5. Click **Save**. Verify the summary of the changes (to date) that appear in the **Change Summary** section in the lower half of the screen.

Change Summary

Original Contract :	
Present Contract :	
This change Order :	496.12
New Contract Total :	
%Cumulative Change Over Time :	17.00

[Submit To Buyer](#)
[Save](#)
[Exit](#)

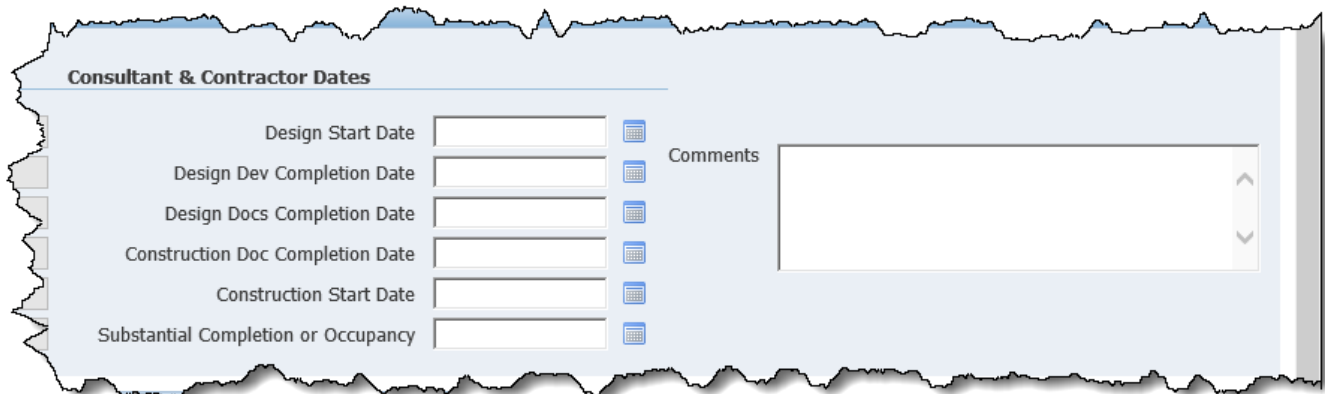
✓ **TIP** (Please click on Submit to Buyer button to submit the CO for Buyer's approval)



## Date Changes

Modifications to project dates provided in the RFx bid can be made in the **Project Dates Details** section of the change order.

1. Populate the revised dates in the appropriate field of the **Consultant & Contractor Dates** column.
2. If you want to explain why the dates are changing, do so in the **Comments** field provided.



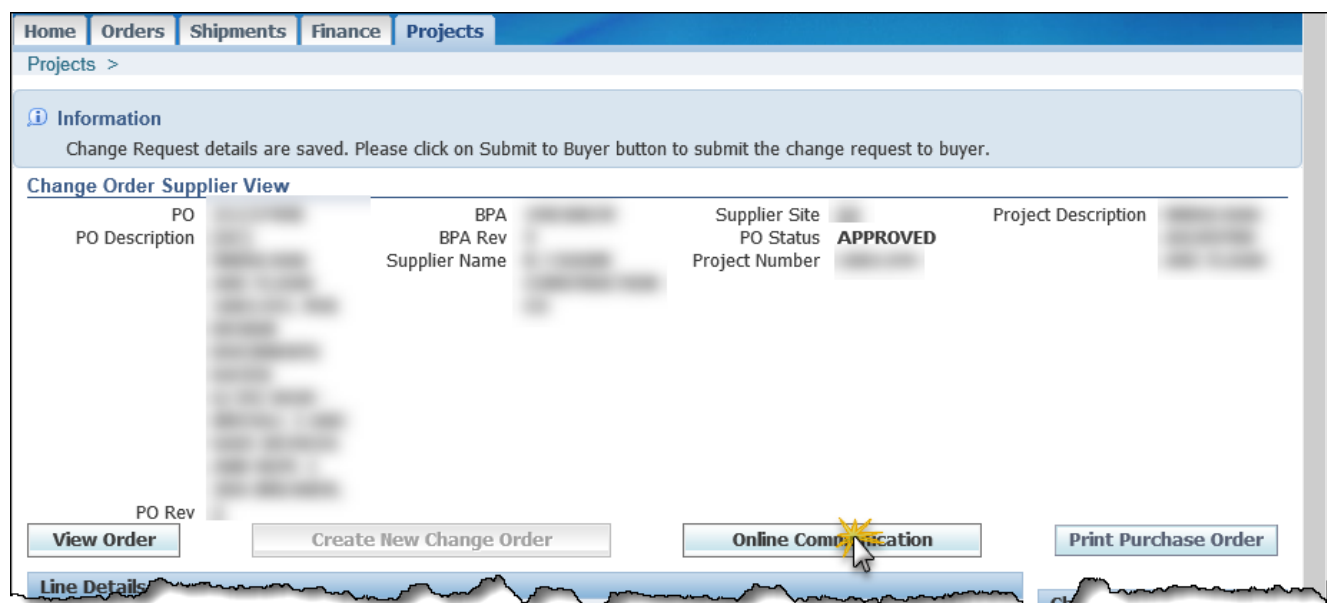
The screenshot shows a section titled "Consultant & Contractor Dates" with a light blue background. It contains several date input fields, each with a calendar icon to its right. The fields are: Design Start Date, Design Dev Completion Date, Design Docs Completion Date, Construction Doc Completion Date, Construction Start Date, and Substantial Completion or Occupancy. To the right of these fields is a large text area labeled "Comments" with up and down arrow icons on its right side.

3. Click **Save**.

## Including Messages and Attachments

To add messages and attachments to your change order:

1. Click **Online Communication** in the **Change Order Supplier View**.



The screenshot shows the "Change Order Supplier View" page. At the top is a navigation bar with tabs: Home, Orders, Shipments, Finance, and Projects. Below the navigation bar is a "Projects >" link. A message box states: "Change Request details are saved. Please click on Submit to Buyer button to submit the change request to buyer." Below this is a table with the following columns: PO Description, BPA Rev, Supplier Name, Supplier Site, PO Status, Project Number, and Project Description. The PO Status is highlighted in green and says "APPROVED". At the bottom of the page are four buttons: "View Order", "Create New Change Order", "Online Communication" (which is highlighted with a yellow star and a mouse cursor), and "Print Purchase Order".

2. The system displays the **Online Discussion Summary** window. Click **New Message**.

Home | Orders | Shipments | Finance | **Projects**

Projects > Change Order Supplier View > Online Discussions Summary

**Messages**

**New Message**

Subject	Message	Sender	Receiver	Date	Reply
No results found.					

Indicates the message has been replied by collaboration team member.

Cancel | Change Order Supplier View

3. The system displays the **Create New Message** window.

### **Adding a Message**

1. Enter **Subject** and **Message**.
2. If you want to include any attachments to the message before sending it, see [Adding an Attachment](#).
3. Click **Next**.

Home | Orders | Shipments | Finance | **Projects**

Projects > Change Order Supplier View > Online Discussions Summary > Create New Message

\* Indicates required field

\* Subject

\* Message

**Attachment**

**Add Attachment...**

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Cancel | **Next**

4. Click **Send**.

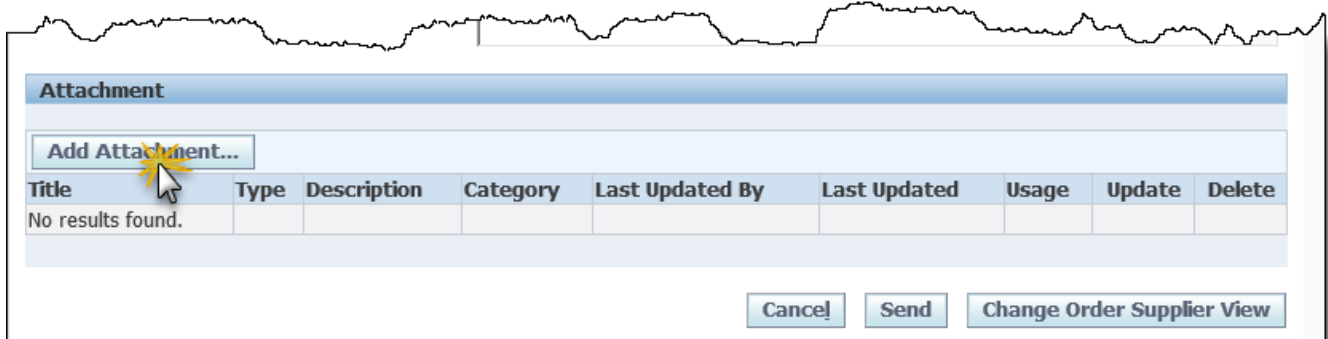
Cancel | **Send** | Change Order View

5. The system displays the **Online Discussions Summary** window. To return to the Change Order, click **Change Order Supplier View** in the lower right corner.



### **Adding an Attachment**

1. Click **Add Attachment** in the **Attachment** section if you wish to add a File, URL, or Text attachment.



2. The system displays the **Add Attachment** window. Enter **Title**, **Description**, and **Category (To Supplier)** in the **Attachment Summary Information** section.

 A screenshot of the "Add Attachment" window in a web application. The window has a navigation bar at the top with tabs for "Home", "Orders", "Shipments", "Finance", and "Projects". Below the navigation bar is a breadcrumb trail: "Projects > Change Order Supplier View > Online Discussions Summary > Create New Message >". The main section is titled "Add Attachment" and contains three buttons: "Cancel", "Add Another", and "Apply". Below these buttons is the "Attachment Summary Information" section, which includes three input fields: "Title" (containing "Supplier Attachment"), "Description" (containing "Please take a look"), and "Category" (a dropdown menu set to "To Supplier"). A green tip icon and text are visible below the Category field: "TIP Title should be less than 30 characters. For notes to AP Team, only use the site name in the Title."

3. In the **Define Attachment** section, select **Type**.
  - For **File**, click **Browse** and select file.
  - For **URL**, enter URL.
  - For **Text**, enter text.
4. Click **Apply** or click **Add Another** (if you have additional attachments to add to the communication).

**Define Attachment**

Type ☒ File ☐ URL ☐ Text

C:\Users\ma947j\Downloads\Training-071921.csv

✓ **TIP** Select text radio button to add notes to AP team.

✓ **TIP** File name should not exceed 50 characters.

5. The system returns to the **Create New Message** window with a confirmation that the attachment has been added successfully. You can update the **Subject** and **Message**, and add more attachments, if needed.
6. Click **Next**.

**Home** **Orders** **Shipments** **Finance** **Projects**

Projects > Change Order Supplier View > Online Discussions Summary >

✓ **Confirmation**  
Supplier Attachment attachment has been added successfully.

**Create New Message**  
\* Indicates required field

\* Subject

\* Message

**Attachment**

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
<a href="#">Supplier Attachment</a>	File	Please take a look	To Supplier		24-Sep-2021	One-Time		
<a href="#">Supplier Attachment</a>	File	Please take a look.	To Supplier		24-Sep-2021	One-Time		

7. The system displays the communication attachments in the lower portion of the window. Click the **Send to PO** checkbox(es) if you are requesting the attachments be added to the purchase order.
8. Click **Send**.

Title	Type	Description	Category	Last Update Name	Last Updated	Usage	Send to PO
Supplier Attachment	File	This is an important attachment.	<a href="#">To Supplier</a>		24-Sep-2021	One-Time	<input checked="" type="checkbox"/>
Second attachment to buyer	File	here it is	<a href="#">To Supplier</a>		24-Sep-2021	One-Time	<input checked="" type="checkbox"/>

Buttons: Cancel, **Send**, Change Order View

9. The system displays the **Online Discussions Summary** window. To return to the Change Order, click **Change Order Supplier View** in the lower right corner.

Buttons: Cancel, **Change Order Supplier View**

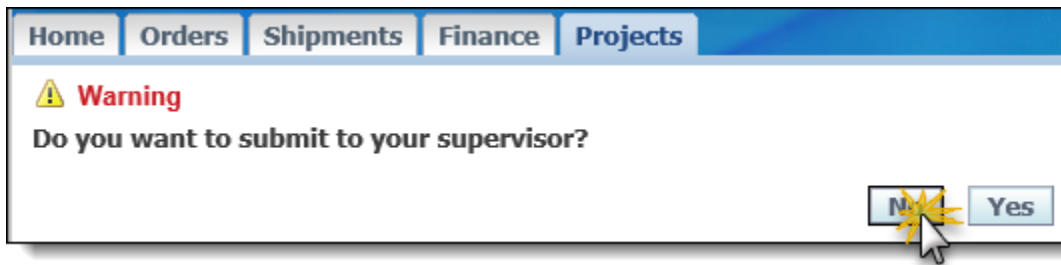
## Submit the Changes

1. Click **Save**.
2. Click **Submit to Buyer**.

Buttons: **Submit to Buyer**, Save, Exit

**TIP** (Please click on Submit to Buyer button to submit the CO for Buyer's approval)

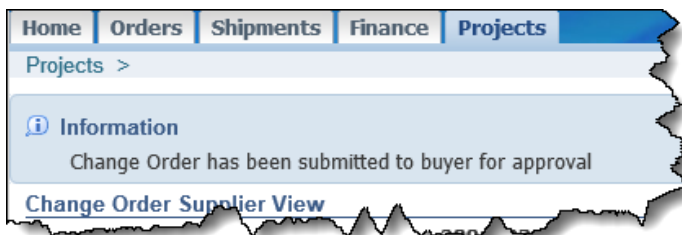
3. The system asks if you'd like to submit the submit this to your supervisor appears. Always click **No**.



**Important!** The Buyer cannot act on the change order until **Submit to Buyer** has been clicked. If the Change Order has a **Status** of **New**, the supplier has not yet submitted it to the buyer.

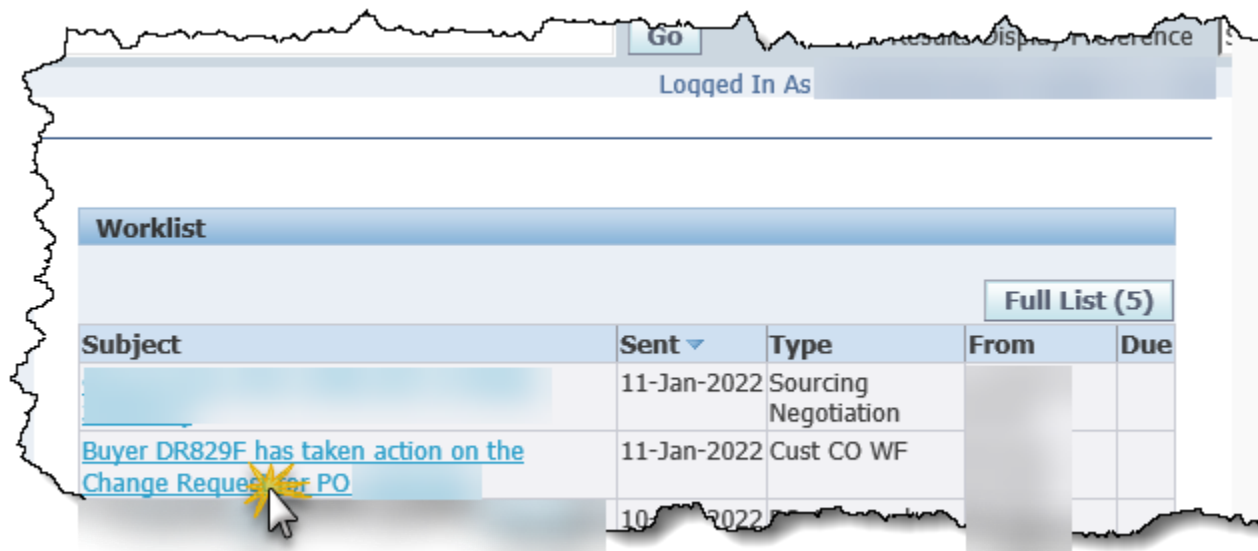
If you navigate away from the CO form, you must click the **Select** radio button for the service line and select **Save** again. Then navigate to the **Submit to Buyer** button.

4. The change order is submitted to the Buyer for approval and the change order status is **IN PROCESS**.

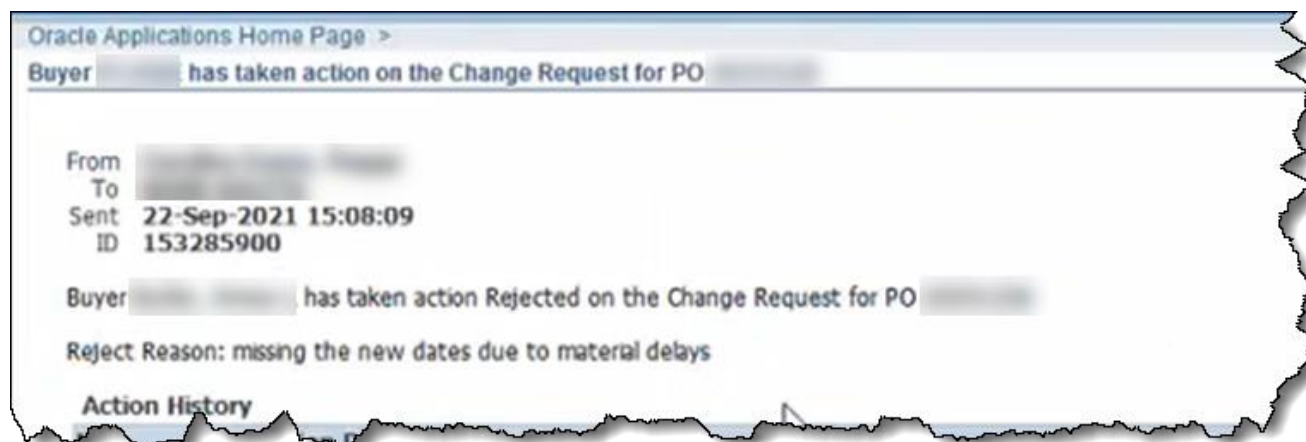


## Approval or Rejection of Change Order

Once the buyer has reviewed the CO and approved or rejected it, you will receive notification of the decision in your **Worklist**. Click the notification to view the Buyer action.




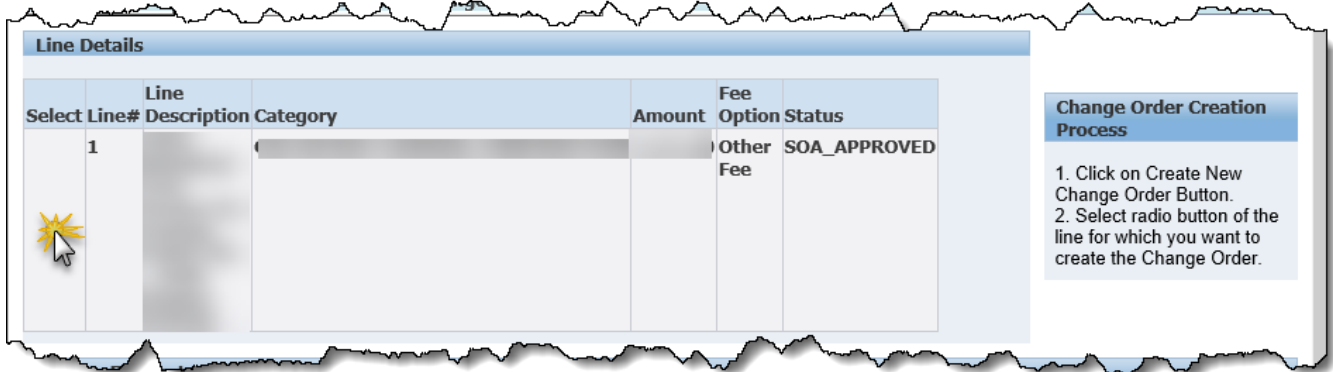
If the CO has been rejected, the rejector's name and rejection reason will be displayed.



## Viewing the Change Order Details

This notification does not display details on the individual items/rows in the change order that the Buyer has Accepted or UnAccepted.

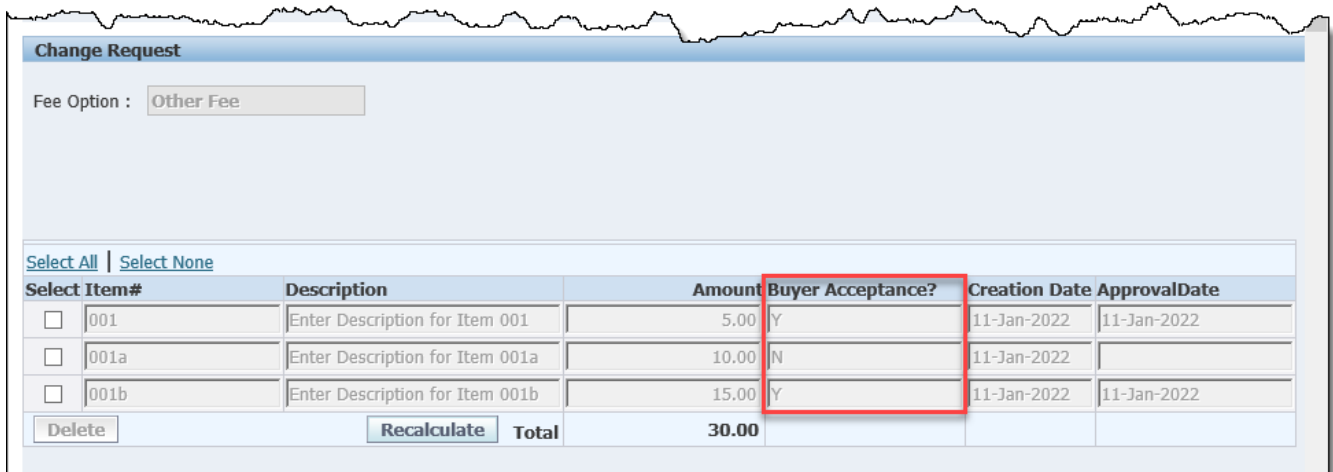
1. Locate the purchase order. See [Search for the Purchase Order](#).
2. Click  in the **Create CO** column.
3. The system displays the purchase order. In the **Line Details** section, click the radio button next to the service line that was modified.



Select Line#	Line Description	Category	Amount	Fee Option	Status
1				Other Fee	SOA_APPROVED

**Change Order Creation Process**  
 1. Click on Create New Change Order Button.  
 2. Select radio button of the line for which you want to create the Change Order.

4. The system displays the service line items in the **Change Request** section. Review the **Buyer Acceptance?** Value for each item/row.



Fee Option : Other Fee

[Select All](#) | [Select None](#)

Select Item#	Description	Amount	Buyer Acceptance?	Creation Date	Approval Date
<input type="checkbox"/> 001	Enter Description for Item 001	5.00	Y	11-Jan-2022	11-Jan-2022
<input type="checkbox"/> 001a	Enter Description for Item 001a	10.00	N	11-Jan-2022	
<input type="checkbox"/> 001b	Enter Description for Item 001b	15.00	Y	11-Jan-2022	11-Jan-2022
<b>Delete</b>		<b>Recalculate</b>	<b>Total</b>	<b>30.00</b>	