

Oracle: Create a Change Order

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[Tech Arch Application Training & Business Process Support](#)



Tech Arch Application Training



Document Revision History

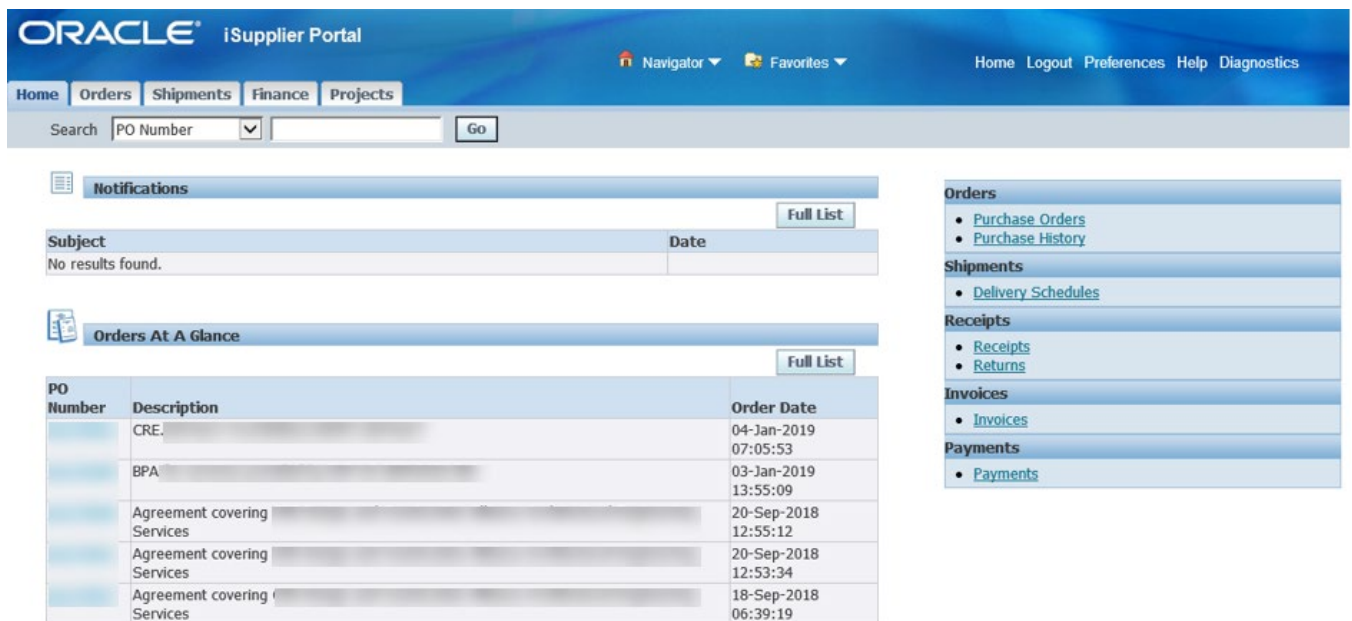
Date	Version	Description
02/27/2018	0.1	Draft
08/16/2018	1.0	Publish
01/21/2019	2.0	Updated to include project date changes
03/31/2020	3.0	Updated screenshots to eliminate sensitive information.

Changes to a Purchase Order

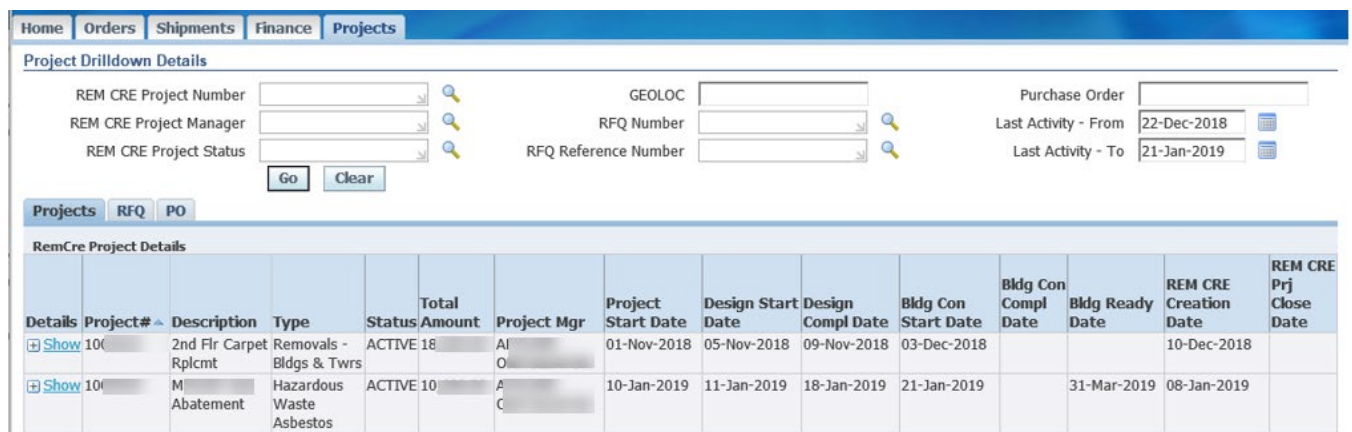
A supplier will have the ability to create a change order via the iSupplier portal & submit to a buyer for approval. The buyer will receive a notification that a change order has been submitted.

- Change orders can only be initiated by the supplier if a fee structure is in place. If one is not in place or if the purchase order is created outside of an agreement, then the *buyer* will have to initiate the change.
- If the PO is not approved, the supplier will not be able to create a change order.
- While a change order is in a status of *In Process*, a supplier cannot make modifications to it.

1. Log into Oracle.
2. Select **ATT iSupplier Portal External User – Purchase Order Change Request Entry > Home Page** from the Main Menu. The **iSupplier Portal** will appear.



3. Click on the **Projects** tab. The **Project Drilldown Details** window will appear.



4. Select the **PO** tab. A list of all purchase orders assigned to your company will appear. Select

Create CO to the right of it; only approved POs will have the icon enabled.

Project Drilldown Details

REM CRE Project Number [] GEOLOC [] Purchase Order []
 REM CRE Project Manager [] RFQ Number [] Last Activity - From 22-Dec-2018 []
 REM CRE Project Status [] RFQ Reference Number [] Last Activity - To 21-Jan-2019 []

Go Clear

Projects RFQ PO

PO#	Description	Project#	Supplier Name	Supplier Site	Buyer	Supplier Contact	Creation Date	Total Amount	Status	Create CO
16	Project to replace	10		07			03-Jan-2019	8,000	IN PROCESS	
16	CRE.	10		07			03-Jan-2019	1,000	REQUIRES REAPPROVAL	
16	Asb	10		07			21-Jan-2019	5,000	APPROVED	

Note:

You can also search for the desired PO by listing it in the *Purchase Order* field of the **Project Drilldown Details** section and selecting **Go**, or by using any of the additional search fields provided.

Project Drilldown Details

REM CRE Project Number [] GEOLOC [] Purchase Order []
 REM CRE Project Manager [] RFQ Number [] Last Activity - From 22-Dec-2018 []
 REM CRE Project Status [] RFQ Reference Number [] Last Activity - To 21-Jan-2019 []

Go Clear

Projects RFQ PO

- The **Change Order Supplier View** appears. Click **Create New Change Order**; the button will only be available if the PO is in a status of **Approved**.

Projects >

Change Order Supplier View

PO [] PO Description **Asbestos Abatement removal reqd in HVAC room and on 2nd flr.** PO Rev 0
 BPA [] BPA Rev 1 Supplier Name [] Supplier Site 07 PO Status **APPROVED** Project Number [] Project Description **Asb Abatement**

View Order Create New Change Order Online Communication

Select	Line#	Line Description	Category	Amount	Fee Option	Status
<input type="radio"/>	1	Asbestos Abatement	CRE.DEFAULT.ASBESTOS/LEAD ABTMMNT.DEFAULT			

Change Request

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.

- Click within the radio button alongside the service line to be modified. The fee options associated with the PO will appear in the **Change Request** section.

The screenshot shows the Oracle Change Order Creation Process interface. At the top, there are buttons for 'View Order', 'Create New Change Order', and 'Online Communication'. Below this is the 'Line Details' section with a table:

Select	Line#	Line Description	Category	Amount	Fee Option	Status
<input checked="" type="radio"/>	1	Asbestos Abatement	CRE.DEFAULT.ASBESTOS/LEAD ABTMNT.DEFAULT		Project Fees (ao2828)	

To the right of the table is a 'Change Order Creation Process' box with instructions: 1. Click on Create New Change Order Button. 2. Select radio button of the line for which you want to create the Change Order.

Below the table is the 'Change Request' section. It includes a 'Fee Option' dropdown set to 'Project Fees (ao2828)' with a magnifying glass icon. Below this is a table for 'Changed Costs Break-up':

CostElements	Fees
Direct Cost	0.00
Other Fees	0.00
Project Cost	0.00
Renovation Fees	0.00
Contingency	0.00
Total Cost	0.00

At the bottom of the 'Change Request' section is a table for 'Change Request' items:

Select	Item#	Description	Amount	Buyer Acceptance?	Creation Date	ApprovalDate
No results found.						
<input type="button" value="Add a Row"/>	<input type="button" value="Delete"/>		Total	0		

- Click on the magnifying glass alongside fee option to select the appropriate fee structure (only applicable if more than one was added).

Cost Changes

- Click **Add a Row** in the lower half of the screen. A blank row will be added to your screen. List an item #, description/reason for the change and cost in the fields provided.

This screenshot shows the same Oracle Change Order Creation Process interface as above, but with a new row added to the 'Change Request' table. A green arrow points to the 'Add a Row' button. The new row is:

Select	Item#	Description	Amount	Buyer Acceptance?	Creation Date	ApprovalDate
<input type="checkbox"/>	1	Change in Schedule Fees	450.00 X	N	21-Jan-2019	
<input type="button" value="Add a Row"/>	<input type="button" value="Delete"/>		Recalculate Total	0		

The 'Changed Costs Break-up' table remains the same as in the previous screenshot.

- Repeat step 2 if an added cost breakdown is required. Once all additional fees are listed click **Recalculate**. The fees will feed into the cost breakdown to the right of the screen.

Change Request

Fee Option :

Select Item#	Description	Amount	Buyer Acceptance?	Creation Date	ApprovalDate
<input type="checkbox"/> 1	Change in Schedule Fees	450	N	21-Jan-2019	
Total		450			

Buttons: Add a Row, Delete, Recalculate

Changed Costs Break-up

CostElements	Fees
Direct Cost	450.00
Other Fees	0.00
Project Cost	450.00
Renovation Fees	0.00
Contingency	0.00
Total Cost	450.10

- Click **Save**. A summary of the changes (to date) will appear in the **Change Summary** section in the lower half of the screen.

Anticipated Substantial Completion Date: Substantial Completion or Occupancy:

Substantial Completion or Occupancy:

Change Summary

Original Contract : 5,9
 Present Contract : 5,9
 This change Order : **450.10**
 New Contract Total : **6,3**
 %Cumulative Change Over Time : **7.63**

Buttons: 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.

Buttons: Add a Row, Delete, Recalculate, Total, Contingency, Total Cost

Project Dates Details

Project Dates	Contractor Dates	Consultant & Contractor Dates
Project Start Date: <input type="text" value="10-Jan-2019"/>	Design Start Date: <input type="text" value="23-JAN-2019"/>	Design Start Date: <input type="text" value=""/>
Estimated in Service/All Trans Date: <input type="text" value="20-May-2019"/>	Design Dev Completion Date: <input type="text" value="25-JAN-2019"/>	Design Dev Completion Date: <input type="text" value=""/>
Anticipated Design Start Date: <input type="text" value="11-Jan-2019"/>	Design Docs Completion Date: <input type="text" value="25-JAN-2019"/>	Design Docs Completion Date: <input type="text" value=""/>
Anticipated Design Completion Date: <input type="text" value="18-Jan-2019"/>	Construction Doc Completion Date: <input type="text" value="28-JAN-2019"/>	Construction Doc Completion Date: <input type="text" value=""/>
Anticipated Construction Start Date: <input type="text" value="21-Jan-2019"/>	Construction Start Date: <input type="text" value="30-JAN-2019"/>	Construction Start Date: <input type="text" value=""/>
Anticipated Substantial Completion Date: <input type="text" value="31-Mar-2019"/>	Substantial Completion or Occupancy: <input type="text" value=""/>	Substantial Completion or Occupancy: <input type="text" value=""/>

Comments:

Change Summary

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

Project Dates Details			
Project Dates	Contractor Dates	Consultant & Contractor Dates	
Project Start Date	10-Jan-2019	Design Start Date	23-JAN-2019
Estimated in Service/All Trans Date	20-May-2019	Design Dev Completion Date	25-JAN-2019
Anticipated Design Start Date	11-Jan-2019	Design Docs Completion Date	25-JAN-2019
Anticipated Design Completion Date	18-Jan-2019	Construction Doc Completion Date	28-JAN-2019
Anticipated Construction Start Date	21-Jan-2019	Construction Start Date	30-JAN-2019
Anticipated Substantial Completion Date	31-Mar-2019	Substantial Completion or Occupancy	

Comments: Dates will slip based on extenuating factors mentioned during today's call.

3. Click **Save** once done.

Submit the Changes

1. Click **Submit to Buyer**. A message asking if you'd like to submit the submit this to your supervisor will appear. If
 - o You do not wish to submit this to your supervisor or your supervisor does not have an Oracle login click **No**.
 - o You wish to submit the change order to your supervisor for review click **Yes** (the supervisor must have an oracle account to act on this). A window allowing you to search for & select the desired email address will be presented.

[Change Order Supervisor View](#)

Please enter the email address of your supervisor for review

Supervisor Email

2. A **PIN Validation** window will appear. List your PIN in the field provided then click **Sign**. If you do not recall your PIN, select **Create/Rest PIN** and follow the onscreen prompts to reset it.

The change order will be submitted to the buyer for approval.

Home Orders Shipments Finance Projects

Projects >

Information
Change Order has been submitted to buyer for approval

[Change Order Supplier View](#)