

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	Prepared By
02/27/2018	0.1	Draft	Afolake Oritsejafor
08/16/2018	1.0	Publish	Afolake Oritsejafor
01/21/2019	2.0	Updated to include project date changes	Afolake Oritsejafor

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.

ORACLE[®] iSupplier Portal

Home Logout Preferences Help Diagnostics

Home Orders Shipments Finance Projects

Search PO Number Go

Notifications [Full List](#)

Subject	Date
No results found.	

Orders At A Glance [Full List](#)

PO Number	Description	Order Date
16176501	CRE.DEFAULT.FLOORING/CARPET.DEFAULT	04-Jan-2019 07:05:53
16176498	BPA for services provided by EXP US SERVICES INC	03-Jan-2019 13:55:09
16175998	Agreement covering CRE Design and Construction Alliance Architectural Engineering Services	20-Sep-2018 12:55:12
16175991	Agreement covering CRE Design and Construction Alliance Architectural Engineering Services	20-Sep-2018 12:53:34
16175997	Agreement covering CRE Design and Construction Alliance Architectural Engineering Services	18-Sep-2018 06:39:19

Orders

- [Purchase Orders](#)
- [Purchase History](#)

Shipments

- [Delivery Schedules](#)

Receipts

- [Receipts](#)
- [Returns](#)

Invoices

- [Invoices](#)

Payments

- [Payments](#)

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

Home Orders Shipments Finance **Projects**

Project Drilldown Details

REM CRE Project Number GEOLOC Purchase Order

REM CRE Project Manager RFQ Number Last Activity - From

REM CRE Project Status RFQ Reference Number Last Activity - To

Projects RFQ PO

RemCre Project Details

Details	Project#	Description	Type	Status	Total Amount	Project Mgr	Project Start Date	Design Start Date	Design Compl Date	Bldg Con Start Date	Bldg Con Compl Date	Bldg Ready Date	REM CRE Creation Date	REM CRE Prj Close Date
Show	1000925	2nd Flr Carpet Rplcmt	Removals - Bldgs & Twrs	ACTIVE	18,500.00	AFOLAKE ORITSEJAFOR	01-Nov-2018	05-Nov-2018	09-Nov-2018	03-Dec-2018			10-Dec-2018	
Show	1000934	M54187 Asb Abatement	Hazardous Waste Asbestos	ACTIVE	10,600.00	AFOLAKE ORITSEJAFOR	10-Jan-2019	11-Jan-2019	18-Jan-2019	21-Jan-2019		31-Mar-2019	08-Jan-2019	

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.

Home Orders Shipments Finance **Projects**

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

Projects RFQ **PO**

PO#	Description	Project#	Supplier Name	Supplier Site	Buyer	Supplier Contact	Creation Date	Total Amount	Status	Create CO
16176502	Project to replace carpeting on 1st flr of m2288 (Trade St) location	1000925	EXP US SERVICES INC>N9R	07	Oritsejafor, Afolake E	Larson, Scott	03-Jan-2019	8,642.00	IN PROCESS	
16176501	CRE.DEFAULT.FLOORING/CARPET.DEFAULT	1000925	EXP US SERVICES INC>N9R	07	Evans, Peggy	Larson, Scott	03-Jan-2019	1,320.00	REQUIRES REAPPROVAL	
16176512	Asbestos Abatement removal reqd in HVAC room and on 2nd flr.	1000934	EXP US SERVICES INC>N9R	07	Oritsejafor, Afolake E	Larson, Scott	21-Jan-2019	5,900.10	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

Projects RFQ **PO**

5. 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 16176512 BPA 16176498 Supplier Site 07 Project Description M54187 Asb Abatement

PO Description Asbestos Abatement removal reqd in HVAC room and on 2nd flr. BPA Rev 1 PO Status APPROVED

Supplier Name EXP US SERVICES INC>N9R Project Number 1000934

PO Rev 0

Select	Line#	Line Description	Category	Amount	Fee Option	Status
<input type="radio"/>	1	Asbestos Abatement	CRE.DEFAULT.ASBESTOS/LEAD ABTMNT.DEFAULT	5,900.10	Project Fees (ao2828)	

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.

Change Request

- 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.

2nd flr.

PO Rev 0

View Order Create New Change Order Online Communication

Select	Line#	Line Description	Category	Amount	Fee Option	Status
<input checked="" type="radio"/>	1	Asbestos Abatement	CRE.DEFAULT.ASBESTOS/LEAD ABTMNT.DEFAULT	5,900.10	Project Fees (ao2828)	

Change Request

Fee Option :

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			

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

Project Dates Details

Change Order Creation Process

- Click on Create New Change Order Button.
- Select radio button of the line for which you want to create the Change Order.

- 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.

VIEW ORDER Create New Change Order ONLINE COMMUNICATION

Select	Line#	Line Description	Category	Amount	Fee Option	Status
<input checked="" type="radio"/>	1	Asbestos Abatement	CRE.DEFAULT.ASBESTOS/LEAD ABTMNT.DEFAULT	5,900.10	Project Fees (ao2828)	

Change Request

Fee Option :

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

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

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

Change Order Creation Process

- Click on Create New Change Order Button.
- Select radio button of the line for which you want to create the Change Order.

- 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 : Project Fees (a02828)

Select Item#	Description	Amount	Buyer Acceptance?	Creation Date	ApprovalDate
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: 31-Mar-2019

Substantial Completion or Occupancy: []

Substantial Completion or Occupancy: []

Change Summary

Original Contract : 5,900.10
 Present Contract : 5,900.10
 This change Order : 450.10
 New Contract Total : 6,350.20
 %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: 450

Contingency: 0.00

Total Cost: 450.10

Project Dates Details

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

Comments: []

Change Summary

Original Contract : 5,900.10
 Present Contract : 5,900.10
 This change Order : 450.10
 New Contract Total : 6,350.20

Buttons: Submit To Buyer, Save, Exit

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

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 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](#)