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CHAPTER 1 – INEIGHT CHANGE OVERVIEW

Change is where you can manage the living history of your changes, their associated costs, and convert them into change orders, as necessary, when working with both the owner and subcontractors. As issues arise, project engineers record and submit issues, get them approved through the client and execute change orders.

The concept of project related changes is one of the most difficult entities to track on a project. Most projects run into many kinds of issues during the contract lifecycle. Those projects that don't utilize InEight Change will usually track project progress in an Excel sheet, or alternate software.

The Change tool provides a consistent, thorough way to manage your changes. It replaces your change tracking spreadsheet with a thorough and flexible change order management process.



The Change module follows the following workflow:

1.0.1 CHANGE OVERVIEW

When the Change workflow is activated in Project Settings, you will see that the Change register contains rows and columns like a spreadsheet and consists of tabs that further break down the different stages on an issue.

8	105091 (Stee	I Training Job)	-	Change 🔻										?	8 8
			PENDING ISSUES	ISSUE LOG	POTENTIAL CO LOG	CLIENT CO LOG	ACTION 3	AUDIT LO	G CHANG TEMPLAT	E TES	V	iew: Unsav	ed (All)		•
(+)	ե է									C	hange issue statu	us 🔻	Σ	F (i)	Q
	Issue ID 📒 👳	Issue ID 📒 👳	Issue name	Field cont	Issue start date	Issue stat 👳	Ball in court	Value type	Assigned to 🔤	Client CO ID	Ball in co	PCO ID		Written no	Date
	35	35	Test June 17 issue	paul trippi	06/17/2019	In Review								-1	
	34	<u>34</u>	PT - Bearing Pads		06/17/2019	In Review								-1	
	33	33	PT - Bearing Pads	paul trippi	06/17/2019	In Review								-1	
	32	32	PT- Bearing Pads	paul trippi	06/17/2019	In Review	Client							-1	

The principal focus within Change is the concept of creating, approving and tracking of issues and change orders. As new issues come up within the contract lifecycle, Change is where you can collect your Issues, convert them into Potential Change Orders (PCOs) and Client Change Orders (CCOs).

Each issue has the capacity to track the information necessary for any legal action or related documentation. Some of the information you can capture to track an issue are:

- Issue name and full description
- When the issue started
- The source/cause of the issue (a field condition, client instruction, etc.)
- The scope of the issue (out of scope, in scope, contingency, etc.)
- · Confirmation of notifying the client

Current value	Delay days due to issue	Ball in cour	t		Issue :	status		Pri	ricing status		Prop	osal status			
\$6.80		None		•	In Re	view	•	1	None	•	No	ne	•		
ctions 👻			DETAILS	PF PR	RICING & OPOSAL	SI D	UPPORTING OCUMENTS						Σ	3	ç
	locu	ue description	Field information	Schedule	e impact	Client notification	Design infor	mation					Cancel		Sav
	Issue description Created by Lavkumar Pandey on 02/04/2020						Chan	ge	orders						
	* Issue name		*Issue start date				🔁 Ass	ign to	o potential change o	order					
	New issue		02/04/2020			m	🖸 Con	wert t	to client change ord	ler					
	Description		Hint: Date of the st	tart of im	pact	1000	Requ	est	t for inforr	nation					
						<u>^</u>	RFI No.		Title	Status					
						Ŧ			Computer doc		^				
	Source/cause		Change condition								Ŧ				
	Source/cause.1		None			•	Split	iss	sue						
	Hint: Select what prompted the source/cause		Hint: Select the co	ndition of	f the chang	7e									
	Scope		Assigned to				🔥 Split	t issu	e						
	None 👻														
	Allowance category		Hint: Type employe	ee name											

1.0.1.1 WHO USES CHANGE?

The primary users of Change differ from the typical roles that use the rest of InEight cloud platform, namely Contract Managers and Contract Administrators. In other words, the main users of Change are

typically the same as Contract. These are employees focused on contract and change management as their primary role.

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CHAPTER 2 – PROJECT SETUP

To manage issues and change orders successfully, the correct Change settings must be set up before project initiation. Some settings differ between the organization and project levels.

2.1 ORGANIZATION SETTINGS

Prior to initiation, the organization and project settings are significant to successfully manage a project in Change.

Organization settings are distinct from the project settings since they are defined by the administrative level in your organization. The image below shows you how to access organization settings from the main menu.



2.1.1 CUSTOMIZABLE REVENUE CATEGORIES

Revenue categories and probability percentages are customizable within each organization through master data by manual entry or API. This customization has specific permissions around edits.

The Revenue category and Probability percentage in the Issue, PCO and CCO Logs pull data dynamically from master data.

Revenue categories are located in your organization's Master data libraries. From the Main menu, select **Master data libraries** and then **Revenue categories**.

When you land on the organization settings page, select **Change** from the left navigation. This opens the Change organization settings.

≣ ଜ	/ Settings
INEIGHT®	
MB	INEIGHT®
Main menu	MB
S100000 - PKS Inc	<back< td=""></back<>
Rivers Edge One Office Building 1	MASTER DATA LIBRARIES
Blue Water Energy Center 10365	Account codes
Van Nuys North Platform 103442	Attributes
MemFix 4 103660	Contacts
Show more +	Cost categories
SETTINGS	Cost centers
All projects & organizations	Currencies
命 Master data libraries	Disciplines and commodities
옶 Suite administration	Field attributes
Profile	General ledger accounts
INEIGHT ONLINE	Incoterms
Explore products	Operational resources
 InEight learning and support 	Payment terms
InEight.com	Qualifications
	Revenue categories
	Unions
	Units of measure
	Vendors

On the Revenue categories page, you can add new revenue categories or edit existing ones as well as, set revenue categories to be Active or Inactive.

nglis	h				
	Revenue category name	Revenue change status name	Probability percentage	State	i
	Overruns updated	Overruns updated	0	Inactive	
	Extra Work, Force	Unexecuted Changes	0	Inactive	
	Bonus	Unexecuted Changes	0	Inactive	
	Highly Probable - Clear Entitle	Unexecuted Changes	0	Active	
	Highly Probable - Client Ackno	Unexecuted Changes	0	Active	
	Administratively Imminent	Unexecuted Changes	0	Active	

TIP

NOTE

Use permissions to control who can view, add, or edit revenue categories.

By default, the Executed change order revenue category is always present. This is the default status in all logs when an issue, PCO, or CCO is executed.

An example would be to tag a Potential entitlement, which is a \$100,000 change order. Organizations would set the categories and probabilities percentages based on their organization's business rules. Customizable per tenant and at the Change level, you can assign the revenue category to the PCO, CCO, or issue you want.

8	Master data libraries	✓ Revenue categories ▼					
+	K						
English						Spanish	
	Revenue category name	Revenue change status name	Probability percentage	5	State ()	Revenue category name	Revenue change status r
	Potential Entitlement	Unexecuted	50	0 4	Active	Potential Entitlement	Unexecuted
	Highly Probable	Unexecuted	30	0 4	Active	Highly Probable	Unexecuted
	Executed	Executed	100	0 4	Active	ES_Executed Change Order_ES	ES_Executed_ES

These categories are used by InEight Control for revenue projections. These are required in Change and Control. Association is done between the probability percentage, revenue category and revenue change status.

wailable columns		Selected columns	
Search	Q.	Search	Q.
ssue custom neid 3 Issue custom field 4 Number of subcontractors Plan/Detail sheet number Probability percentage Proposal checklist Revenue category Revenue change status Schedule impact Self perform subtotal Source/cause Specification section number Sub checklist Subcontractors Temporary vendors		Issue start date Issue status Assigned to Ball in court Written notice days remaining Ball in court person Date client notified Value type Current value Pricing status Date price to client Proposal status Scope Supporting documents Notes	•

Probability perce	Revenue c
	None 🔺
	None
	Highly Proba
	Highly Probab
	Extra Work, Fo
	Overruns, Und

After selections are done, such as Highly Probable, the Probability percentage pulls from the Master data. It is then pushed to Control.

2.1.1.1 ACCESSING PROJECT DETAILS

Project details can be accessed at the organization level in Settings > **Edit project**. Project details provides all the information for the project.

2.1 Organization settings

All projects & organizations					? (100	8	
All projects & organizations > Edit project	C DETAILS	S INFORMATION >					
				Project settings	Cancel		
Project details					_		
* Project ID		* External project ID					- 1
110140		110140	0	(+)			- 1
				Add project			- 1
* Name		* Status		image			- 1
Procurement and Project Support -	Krupski 2017	Active	•				- 1
* Organization				150 x 150 px recommende	ed		
S100000 - PKS Incs : S100000 - PK	(S Incs : SB6000 - Home	Office : SC6001 - Home Office Shared Services : S.	•				
Project start date		Project end date					
05/26/2017	m	12/28/2017	m				
Notes							
kjdsksd;la							

2.1.1.2 ACCESSING ORGANIZATION LEVEL SETTINGS

After you open the organization settings page, select the **Change** icon from the left navigation. You can use the expansion arrows to see the application names. This opens the Change organization settings.



2.2 CONFIGURATIONS

Change has organization settings to further configure the product for your organization. To see this setting, go to organization settings, then select Change > **Configurations**. The settings that are configurable at both the organization and project levels are:

- ID customization
- Change condition
- Pricing configuration
- Custom lists
- General status
- · Pricing status
- Proposal status
- Responsible party
- Scope
- Source/cause
- Task type setup

»		CONFIGURATIONS WORKFLOW CHANGE CHANGE CUSTOM ASSIGNMENTS TEMPLATES LABELS			
				😇 Clear all filters	Q
4	Configuration list	Last modified by	⇒ Last	modified date	
	ID customization		04/14	4/2022	
-	Change condition		04/27	17/2022	
	Custom lists		04/13	3/2022	
8	General status		04/23	17/2022	
(1)	Pricing.status		04/27	17/2022	
(1)	Proposal status		04/27	17/2022	
	Responsible.party		04/27	17/2022	
	Scope		04/27	17/2022	
	Source/cause	and the second sec	04/15	5/2022	
0	Task type setup		04/28	18/2022	

You can manage and customize configurations according to your organization. You can also add to the list. Each configuration set up at the organization level flows down to the project level where further customization is available.

Upon save	e party names displayed her all modifications will be refle	e are established at the organizational level and cannot be deleted. Additional Hespon: ected in the 'Responsible party' drop down menu and the 'Responsible party' field for a	able party names may be added if needed. I assigned Issues/PCOs/CCOs.
English			
	Position	* Responsible party name	* Active
(\div)	38	Enter Responsible party name	\odot
	01	Client	\odot
	02	Contractor	\odot
	03	Designer	\odot
	04	Sub/Vendor	\bigcirc

For Scope, status is configurable at the organization level. This lets you add and maintain scope definitions that are unique to your organization. Because scopes are custom, Change does not validate the scope when closing an issue.

English			Español	ES-MX	٣
	Position	* Scope name	* Scope name		
÷	29	Enter Scope name	Enter Scope name		
	01	In scope	Asunto por resolver en alcance	\otimes	Â
	02	Out of scope	Asunto por resolver fuera de alcance	\otimes	
_					

These changes will be reflected in the project as drop-down lists.

	DETAILS	PR	OPOSAL	DOCU
Issue des	scription	Field information	Schedule impact	Client no
Issue description Created by chandrakala c on 09/30)/2019			
* Issue name		*lssue star	t date	
abc_123		10/15/20	19	**
		Hint: Date	of the start of imp	oact
Description				1000
Source/cause	7	Change co	ndition	•
None 🗸		None		-
Hint: Select what prompted the so.		Hint: Selec	t the condition of	the c
Scope	7	Assigned t	0	
None 🗸				

Pricing and Proposal status list items for issues, PCOs and CCOs. When you select the Pricing status type on the left side of Pricing or Proposal status pages, you can add Change condition and Source or cause list items only for issues.

Pricing status type	Pricing status details			
Issue	Pricing status ite	ems created here will be available only at the Issue level for a	projects within this organization. Create and manage the ava	ailable drop down
Potential change order	options for Issue Upon save all m	e level Pricing status. odifications will be reflected in the 'Pricing status' drop down n	enu and the 'Pricing status' field for all assigned issues.	
Client change order	English		Español	ES-MX 💌
		* Pricing status name	* Pricing status name	
	+	Enter Pricing status name	Enter Pricing status name	
		Not started	No iniciado	\otimes
		Internal review 123	En proceso	\otimes

2.3 CUSTOM LISTS

The Custom list setting (organization Settings > Configurations > **Custom lists**) lets your organization configure default lists that automatically populate custom drop-down list fields for projects. You can configure two custom lists each for issues, PCOs, and CCOs.



You can customize the name of the fields using the Custom labels settings. Use the Active toggle to indicate whether the list item is active. When the value is active it is available in lists. If it is inactive, the value is not available for use in future issues, PCOs, and CCOs but is maintained where it was previously used.

After a custom list has been used you cannot delete it from the organization settings unless you delete it from all items. You also can inactivate a custom list, so it is not available for future use.

Custom lists set at the organization level are applied to the project level and default to Active.

2.4 PRICING CONFIGURATION

Use the Pricing configuration page (organization Settings > Configurations > **Pricing configuration**) to restrict the ability to modify the executed contract amount during the execution of a client change order.

When you disable Allow users to edit the Executed change order amount upon execution toggle at the organization level, the setting at the project level is also disabled. When you enable the setting at the organization level, you can enable or disable the setting for each project.

Client change order configuration	
Allow users to edit the 'Executed change order amount' upon execution?	
Θ	

2.5 ID CUSTOMIZATION

Change lets you customize your PCO and CCO numbering schemes to ensure consistent numbering. Configuration settings at the organization and project levels let you specify whether to generate PCO and CCO IDs sequentially, and if so, a prefix and starting number.

You can configure customized IDs using the ID customization configuration list (Organization >Settings > Configurations > **ID customization**). You can set up numbering for PCOs and CCOs separately.

Configurations > D	dit configuration list			Cancel Save
	Potential change order			Allow projects to edit settings
	Values established here will create system generated sequential ID's for Potential change orders. Changes will default to future Potential change orders only.			
	Generate Potential change order ID's sequentially?			
	Prefix	Starting number	Display format	
	PCOF	001	PC0#001	
	Example: PCO -, PCO #	Example: 001		
	Client change order			Allow projects to edit settings
	Values established here will create system generated sequential ID's for Client change orders.			
	Changes will default to future Client change orders only.			
	Generate Client change order ID's sequentially?			
	\bigcirc			
	Prefix	Starting number	Display format	
	CC012##	11	CCD12##11	
	Example: CCO -, CCO #	Example: 001		

The Generate PCO/CCO IDs sequentially settings indicate whether Change generates numbers sequentially. When set to *No*, you enter any number as the ID when you create the PCO or CCO. When set to *Yes*, you can specify a prefix and a starting number that Change uses when it automatically generates the PCO or CCO ID.

The Prefix and Starting number fields are enabled only when the Generate Potential change order/Client change order IDs sequentially toggle is set to *Yes*. The prefix on the PCO or CCO is added to the ID in the exact way it is entered in the field. If you want a space between the prefix and the starting number, you must enter it in Prefix field. You can edit the starting number until a PCO or CCO has been created. After that, the field is disabled.

The Allow projects to edit settings check box specifies whether you can override the settings at the project level. When checked, the organization-level settings are the default at the project level, but the project administrator has the ability to override the settings. When the check box is checked, the numbering scheme is enforced at the project level. After you establish a starting number, and the first PCO or CCO is created, you cannot change the starting number at the project level.

2.6 TASK TYPE SETUP

Use the Task type set up page (organization Settings > Configurations > **Task type setup**) to select the InEight Compliance registered task template to use when creating tasks in an issue, PCO, or CCO. The template is used for all projects in the organization.

Task type	setup	
The selected co	mpliance registered template will be available on all projects within this organization for any assigned tasks.	
Compliance rec	istand tamplata	
Compliance reg	istered template	

Refer to the <u>Compliance topics</u> for information about setting up templates.

2.7 WORKFLOW ASSIGNMENTS

The Workflow Assignments tab lets you set up approval processes for budget moves, potential change orders, client change orders, and documents. The settings include defining the number of steps in your approval processes and making assignments of who approves each step.

You can set up dollar-value thresholds based on contract type at an organization level for PCOs or CCOs. The organization has an approval matrix where any dollar amount over the threshold set must be approved. Approval for budget moves and document approvals have ordered steps assigned to roles.

2.7 STEP BY STEP 1 – ADD A WORKFLOW ASSIGNMENT THRESHOLD

Summary: Add a workflow assignment threshold to set the amount at which a PCO or CCO must be approved.

Considerations: The workflow steps set at the organization level are performed after those set at the PCO/CCO and project levels. However, if the value of the PCO or CCO is below the organization level thresholds, the workflow thresholds set at the organization level will not show in the Workflow Assignments.

Thresholds are absolute values, so a pricing change in either direction starts the approval workflow.

Quick steps:

- 1. Go to the Workflow Assignments tab.
- 2. Select the PCO approval setup or CCO approval setup tab.
- 3. Click the Add approval icon.
- 4. In the Add approval slide-out panel, enter the threshold amount and approval step title.
- 5. Indicate whether projects must select specific users based on assigned roles. When the check box is selected, the project must add a user who has that role to that step before workflow can be started. If the check box is not selected, all users in that role are eligible for approval.
- 6. Enter the roles for the Assign approval roles.
- 7. Click **Add** to complete.
- 8. If you want the approval workflow for the threshold to have additional steps, click **Add another step**. To change the position of a step, select it, and then use the up and down arrows to the right of the steps to move up or down.

Organization-level thresholds cascade to every PCO or CCO. You can add additional steps at the project level, which are performed before the steps set at the organization level. You can add additional approval steps at the individual PCO or CCO level, which, regardless of the value of the PCO or CCO, are always first.

2.7 STEP BY STEP 2 – ADD A BUDGET MOVE APPROVAL WORKFLOW

Summary: Add a budget move approval workflow when you want the budget move to be approved before being sent as a draft to InEight Control.

Considerations: When there is a workflow in place, the budget move is not sent to Control until it has been approved in Change.

Quick steps:

- From the organization Settings > Workflow assignments tab, select the Budget move approval setup subtab.
- 2. Click the **Add approval** icon. The Add approval slide-out panel opens.
- 3. Enter the step title and the approver roles.
- 4. Indicate whether projects must select specific users based on assigned roles. When the check box is selected, the project must add a user who has that role to that step before workflow can be started. If the check box is not selected, all users in that role are eligible for approval.
- 5. Click Add.
- 6. Repeat steps 2-5 for each step you want to add.
- 7. Click Save.

What's next: You can add steps at the project level.

2.8 CHANGE TEMPLATES

Much like Contract writer, Change writer is a customized contract document writer intended for a vendor or subcontractor to eventually agree to, accept, or reject.

As an issue turns into a PCO, and a PCO to the client might turn into a CCO, the document associated with the CCO must be signed by all parties for legal reasons.

Change writer can create project specific change documents such as issue summary documents, PCOs or CCOs through Microsoft Word or Microsoft Excel templates and tags. This helps you create customized client change order documents. If there is a need to create a customized change contract for a client, Change provides Change writer to aid in the area. This is a legal document that is intended to be signed by all parties and stakeholders.

2.8.0.1

2.9 TEMPLATES SUBTAB

The templates subtab shows the templates register and gives you the tools you need to start building templates.

You can download a sample template that will help you get started with your template. You can also get a list of general tags and collection table tags to be used in the template. After you have opened the list, you can export the tags to a Microsoft Excel spreadsheet.

2.9.1 DOWNLOAD A SAMPLE TEMPLATE

You can download a sample template in Microsoft Word and Microsoft Excel formats. The samples show how a contract could look in either format. This feature is available at both the organization and project levels.

To download a sample template, click the **Download sample template** icon on the template register, and then select either **Download Word template** or **Download Excel template**.

»					cor	FIGURATIONS WORKFLI	OW CHANGE ENTS TEMPLATES	CHANGE CUSTOM LABELS					
						Templates	Template settings						
	۲										😇 Clear all filters	s 🛓 🛡	Q
		Template	Description	Status 👻	Template type	Template file	Created date	Created by	Modified date 👘	Modified by	Template language 🚽 A	Atributes	Ŧ
()	0	New CCO	New CCO	Published	Client change order	N - CCO.docx	06/15/2021		06/15/2021		NB-NO		
	0	New PCO	New PCO	Published	Potential change order	N - PC0.docx	06/15/2021		06/15/2021		NB-NO		
8	0	New	New	Published	Issue	N - Issue.docx	06/15/2021		06/15/2021		NB-NO		
C	0	Org.to.project.Template	Org to project Template	Published	Issue	Norway_localization tag_21-	06/11/2021		06/11/2021		EN		

2.9.2 CREATING A CHANGE ORDER TEMPLATE

To create a template for your change order documentation, you will use predefined change writer tags to auto-fill your change document with the information from your contract. From the Add change template record, you can select the **View available tags** icon and choose General tags to open the list of general tags that can be used in the body of the template only. Select **Collection table tags** to see the list of tags that can be used in collection tables. General tags cannot be used in a collection table. After you have opened the list, you can export the tags to an Excel spreadsheet.

The Location source shows the name of the page that Change pulls the information from when building the template. You can see an example of how this information might look in the change order in the Example column. The Applicable for column shows the type of template for which the tags are valid.

tilize below general tags f	to build change templates.	Tags in the template would be replaced with the corresponding tag values, while	generating change docum	ent. 💽 C
Tag name 📃	Location source 👘	Description -	Example 📃	Applicable for 📃
< <project id="">></project>	Project details	The project number	123456	All templates
< <project name="">></project>	Project details	The name of the project	Metro Power Station	All templates
< <project address1="">></project>	Project details	The address of the project	1700 Northwest Street	All templates
< <project address2="">></project>	Project details	The address of the project	Unit 3	All templates
< <project city="">></project>	Project details	The city of the project	Scottsdale	All templates
<< Project country or r	Project details	The country of the project	US	All templates
< <project code<="" postal="" td=""><td>Project details</td><td>The postal or zip code of the project</td><td>85201</td><td>All templates</td></project>	Project details	The postal or zip code of the project	85201	All templates
< <project state="">></project>	Project details	The state of the project	Arizona	All templates
< <contract number="">></contract>	Project details	The projects contract number	CA 139481029	All templates
< <project contract="" dat<="" td=""><td>Project details</td><td>The date of the Project contract</td><td>17-03-2020</td><td>All templates</td></project>	Project details	The date of the Project contract	17-03-2020	All templates
Date project started	Project details	The date the Project started	01-09-2019	All templates

Refer to the instructions on the Instructions tab of the Excel file for information about using tags and building a template.

2.10 TEMPLATE CONTACT TAGS

Template contact tags are general tags that correspond to fields in the project Assigned contacts (project > **Assigned contacts**). Tags let you select contact details to populate information in a generated document. For example, you could select a specific contact name for the greeting in a cover letter or notification letter.

The tags show in the general tags list as <<Template contact: *field>>*, where *field* corresponds to a field in the project contacts. The tags can be used to customize documents when you use standard or bulk template generation. See 5.9 Standard and bulk template processing on page 220 for information about standard and bulk template generation.

When the Change writer detects a template contact tag, it retrieves the information for the selected contact from the project's contacts. When you use the tags with Standard template processing, you can select one contact in the Select contacts step of the Change document wizard. When you use the tags with bulk template processing, you can select up to 10 contacts, and a separate document is generated for each contact.

2.11 MAINTAIN FIELD FORMATTING

Large text box fields, such as Issue description, PCO and CCO description of change, and PCO and CCO contract term fields, contain formatting tools that let you use boldface type, numbered or bulleted lists, and other text formats. To preserve this formatting in Microsoft Word templates, you can insert a Word merge field instead of a tag for the field.

To insert a merge field in a Word template, position the cursor, and then go to Insert > Quick parts > **Field**. From the Field dialog box, select MergeField, and then enter the tag name without the brackets in the Field Properties > **Field name** field (for example, CCO contract term 1). When a document is generated, Word uses the formatting from the field to format the text.

Refer to the Instructions in the Change templates tags spreadsheet for more information about merge tags.

2.12 DOCUSIGN TAGS

DocuSign eSignature tags for recipients let you embed signee information to pull into your organization or project templates. DocuSign tags used in a template are read when sending a document for signature.

The DocuSign tags serve as placeholders for the eSignatures. Change's DocuSign tags also include tags that serve as placeholders for text boxes, check boxes, drop-down lists, and radio buttons that are added by the document sender in the DocuSign Sender view. These tags are available for eSign 1-10 and for each project contact. When you add the tags in the template, you ensure that the corresponding item is consistently placed. For text and drop-down lists, you only place one tag in the template. For check boxes, you place one tag for each option. For radio buttons, a single tag places two buttons in the document. You can add more radio button tags for additional buttons.

When a document with these tags is opened in the DocuSign Sender view, the tags are present, but they do not have values. You can add the values from the Sender view. For example, if the template has three check box tags, when the document is opened in DocuSign, three empty check boxes are shown. You then add the value for each check box in DocuSign.

Refer to the instructions on the Instructions tab of the Excel file for information about DocuSign tags.

2.13 TEMPLATE TYPES

Change templates are classified by the template type. This classification can help you ensure that the template suits your business needs based on the purpose of the template. Change supports the

following template types:

- Client change order
- Potential change order
- Issue

The template type indicates which general tags and collection tags are valid for the template. For example, a client change order template can use the tags that are applicable for client change order templates. Any template can use the tags with the type All templates. The template tags are validated when you attach a template file to the template.

If you have invalid tags, the Template file section of the Details page shows a message that there are validation errors. You must go into the Word or Excel template and fix the errors. You cannot publish the template if there are any errors.

2.14 TEMPLATE LANGUAGE

You can define the language in which the contract template is generated using the Select template language field in the Change template details. Selecting a template language lessens the tags available. For example, if you select Spanish as the template language, you can use only Spanish tags in the template even if the language of your application is English. Upon generation, template and tags are generated in Spanish.

You cannot use tags in multiple languages in a single template. During template validation, the application only searches the tags of the selected language instead of all languages.

2.15 COLLECTION TABLES

You can add multiple items to a vendor, supporting documents, associations, or workflow approvals section of a template by using a collection table. You can create collection tables in Word or Excel that include those items and place it into the template.

A collection table contains collection tags specific to a template type. General tags cannot be used in a collection table. The Change writer searches the information in the Change application and returns the values in the table. Collection tags are specific to the template type. A collection table can have tags for one table type only, but a template can have multiple tables. For example, a Potential Change Order template type can have tables for vendors and supporting documents, but the tables can include only the tags for its table type. The vendors table can have only the tags for the Vendors table type, and the supporting documents table can have only the tags for the Supporting documents table type.

2.15 STEP BY STEP 1 – ADD A COLLECTION TABLE TO A TEMPLATE

To add a collection table to a template:

- 1. Download the collection tags spreadsheet (list) and follow the instructions on the Instructions tab.
- 2. Open or create a new template in Word or Excel. Keep in mind the template type (issue, potential change order, or client change order).
- 3. Create a table in the document or spreadsheet.
- 4. Enter headers, if applicable, and format the table to suit your business needs.
- 5. Enter a tag in each column. The tag can be from one table type only.
- 6. Save your document.
- NOTE Collection tags do not show up on the Review templates page. If you have a template that has only collection tags you see the message No general tags found in this template in the review area. You can see collection tags in the preview. If there is an error you must fix it in the Word or Excel document. If a field is missing, you must go to the contract and fix that item.

2.16 TIPS FOR USING TEMPLATE TAGS

2.16.0.1 TIPS FOR USING TEMPLATE TAGS

Template tags are the building blocks of a Change document. The tags pull information from the corresponding data fields in the issue, PCO, or CCO detail to populate the document, except for Sum of pay items original price and Sum of pay items current price, which pull information from fields in InEight Control. Use the following guidelines when you are adding tags to your template.

Additional instructions can be found in the tags export.

GENERAL TAG INFORMATION

- General tags cannot be used in a table.
- Equations are discarded in document generation. No tags in an equation are read.
- Some fields in the application have their own formatting that is applied in the template (for

example, a bullet list). The general tags associated with those fields use the application's formatting, and you do not have to enter additional formatting in the template.

COLLECTION TABLE TAGS

- Only collection table tags can be used in a collection table.
- Tags cannot be read from nested tables, such as a table within a table.
- Tags for the Pricing summary collection table gather the information from the pricing summary page for an issue, PCO, or CCO and places them in the collection table. If a PCO has multiple issues or a CCO has multiple issues or PCOs, the collection table shows each issue or PCO on a separate line. When a markup is applied to multiple issues, each markup shows on a separate line.

DOCUSIGN TAGS

- Change the color of DocuSign tags to white, otherwise the tags show in the document. The white text matches the background and hides the tag.
- When adding a DocuSign tag to an Excel template, the column or row must be large enough for the entire tag name. When the Excel file is converted to a PDF to send to DocuSign, the system cannot read the tag if the whole tag name was not visible in Excel.

MICROSOFT WORD DOCUMENTS

- Any text formatted in Change on the Details pages are retained in Word documents.
- The pricing summary tags for issue, PCO, and CCO generates all pricing details generate in the Times New Roman font. The tag always generates as a preformatted table.

MICROSOFT EXCEL DOCUMENTS

- For large text cells where you can format text, the formatting is converted to plain text.
- Any text formatted in Change on the Details pages are converted to plain text in Excel.
- Only the first sheet in an Excel template is read and tag information inserted. To generate multiple Excel sheets, create multiple Excel files and merge them into a single PDF.
- The Change writer discards text boxes, word art, drawings, equations and formulas inserted into an Excel document.
- Tags cannot be used in calculations.
- The Pricing summary tags are not valid in Excel.
2.17 BUILD YOUR TEMPLATE

After the Excel file opens from the download, you can copy the tags you need into a Word or Excel version of your change order document, inserting them in the header, footer, and body of your change documents. Refer to the instruction on the Instructions tab of the Excel file for information about using tags and building a template.

A	B		D	E
Tag name	Location source	Description	Example	
< <project id="">></project>	Project details	The project number	123456	
< <project name="">></project>	Project details	The name of the project	Metro Power Station	
< <project address1="">></project>	Project details	The address of the project	1700 Northwest Street	
< <project address2="">></project>	Project details	The address of the project	Unit 3	
< <project city="">></project>	Project details	The city of the project	Scottsdale	
< <project country="" or="" region="">></project>	Project details	The country of the project	US	
< <project code="" postal="">></project>	Project details	The postal or zip code of the project	85201	
< <project state="">></project>	Project details	The state of the project	Arizona	
< <contract number="">></contract>	Project details	The projects contract number	CA 139481029	
< <project contract="" date="">></project>	Project details	The date of the Project contract	17-03-2020	
< <date project="" started="">></date>	Project details	The date the Project started	01-09-2019	
< <original completion<="" contract="" td=""><td>date> Project details</td><td>Date project started + original duration</td><td>04-03-2021</td><td></td></original>	date> Project details	Date project started + original duration	04-03-2021	
< <original duration="">></original>	Project details	Contract time duration in calendar days	550	
< <original project="" value="">></original>	Project details	The original value of the Project contract	\$50,00,000.00	
< <sum all="" ccos="" executed="" of="">></sum>	Project contract summary (sigma)	Sum of all executed change orders to date (except dropped)	\$1,00,000.00	
< <current project="" value="">></current>	Project contract summary (sigma)	The original project contract value + the sum of executed change	\$51,00,000.00	
< <cco value="">></cco>	Current CCO	The value of the selected change order	\$59,137.50	
< <revised project="" value="">></revised>	Calculation	Total sum of the current project value + current change order value	\$51,59,137,50	

A sample Word template is provided for you as an existing template record on the Details Template page.

You access this template by either the Organization level settings or Project level settings. Click the **Download sample template** icon, and then select **Download Word template** or **Download Excel template** to access the download sample template in Word or Excel, respectively.

					CONFIGUR/	TIONS CHANGE TEMPLATES	CHANGE CUSTOM LABELS						
÷	④ Ø Searal filters ↓ □ Q												
	Template	Description		Status	Template type	Template file	Created date	Created by	Modified date				
				Published	Issue	fulltemp.docx	07/28/2020	And Street,	07/28/2020	Clear all filters	_ ~ 🗗 Q		
	term (1) and	terms (10 mg		InActive	Issue	fulltemp.docx	07/28/2020	and the second	07/28/2020 fied by	Template	language 🚽		
	inere i	Barriel .		Published	Issue	MP_preview test.docx	07/22/2020	From Street	07/28/2020	EN			
				Draft	Issue	MP_preview test.docx	07/22/2020	From Street	07/22/2020	CN			
	No. Tree and	Rev Trees or		Published	Issue	English.docx	07/22/2020	fremes the free print.	07/22/2020	١	EN		
0	1000 B	from the s		Published	Issue	English.docx	07/17/2020	from the low grant	07/17/2020	Yester 100 Terrs 1000	EN		
	ter see			Published	Issue	fulltemp.docx	07/17/2020	And Street Street	07/17/2020	4	EN		
				Published	Issue	Change Sample Template (07/17/2020	and the second second	07/17/2020		EN		

NOTE Tags must be inserted exactly as they appear in Tag Name. After all tags are inserted into the Change-related Microsoft Word document, save it as a .docx file. Change writer template can be named the same at the Organization level as those in the Project level. Below is an example of a document with the tags inserted. Everything in yellow are the highlighted tags.

Sample Template with Tag	<u>s</u>		OWNER: [
PROJECT: < <project name="">> <<project address1="">> <<project city="">>, <<project state=""> <<project code="" postal="">> TO CONTRACTOR: <<blank 2="">> <<blank 2="">></blank></blank></project></project></project></project></project>	CHANGE ORDER N ID>> DATE: < <cco crea<br="">ARCHITECT'S PRO <contract date;<br="">CONTRACT DATE; CONTRACT FOR: <</contract></cco>	CHANGE ORDER NUMBER: < CONTRAI ID>> O DATE: << CO ARCHITECT'S PROJECT NUMBER: CONTRACT DATE: <contract date:<="" td=""> CONTRACT DATE: contract date>> CONTRACT DATE: CONTRACT FOR: CONTRACT FOR:</contract>						
THE CONTRACT IS CHANGED (< <cco by="" change="" change)="" contract="" description="" is<="" of="" original="" pet="" previously="" sum="" th="" the=""><th>AS FOLLOWS:</th><th></th><th>S<<original project="" th="" value<=""></original></th></cco>	AS FOLLOWS:		S< <original project="" th="" value<=""></original>					
The field using of previously a	and order		Sector respectively and the second se					
Value of current CCO in review	ange order		Sectorent project values					
value of current oco in review	v		processing and a second second					
New contract sum including th The contract time will be incre The date of Substantial Comol	is change order eased/decreased/by (<mark><<cco< mark=""> letion as of the date of this C</cco<></mark>	approved time ex	S< <revised project="" value<br="">tension days>>) days efore is <<revised completio<="" contract="" th=""></revised></revised>					
New contract sum including th The contract time will be incre The date of Substantial Compl date>> NOTE: This Change Order doe: Contract Time which have bee where he of earther is which the	his change order eased/decreased/by (<<000 letion as of the date of this 0 s not include adjustments to m authorized by Construction	approved time ex hange Order there the Contract Sum, n Change Directive	S< <revised project="" value<br="">tension days>>) days efore is <<revised completio<br="" contract="">Guaranteed Maximum Price, or until the cost item has been agreed the Cost terming Charaction</revised></revised>					
New contract sum including th The contract time will be incre The date of Substantial Compl date>> NOTE: This Change Order does Contract Time which have bee upon by all parties in which th ARCHITECT:	his change order eased/decreased/by (< <cco letion as of the date of this C s not include adjustments to in authorized by Construction e Change Order is then exect CONTRACTOR:</cco 	approved time ex hange Order ther the Contract Sum, n Change Directive uted to supersede	S< <revised project="" value?<br="">tension days>>) days efore is <<revised completio<br="" contract="">Guaranteed Maximum Price, or until the cost item has been agreed the Construction Change Directive. OWNER:</revised></revised>					
New contract sum including th The contract time will be incre The date of Substantial Compl date>> NOTE: This Change Order does Contract Time which have bee upon by all parties in which th ARCHITECT: < <blank 4="">></blank>	his change order eased/decreased/by (< <cco letion as of the date of this C s not include adjustments to in authorized by Construction e Change Order is then exect CONTRACTOR: <<blank 5="">></blank></cco 	approved time ex hange Order ther the Contract Sum, n Change Directive uted to supersede	S< <revised project="" value?<br="">tension days>>) days efore is <<revised completio<br="" contract="">Guaranteed Maximum Price, or until the cost item has been agreed the Construction Change Directive. OWNER: <<blank 6="">></blank></revised></revised>					
New contract sum including th The contract time will be incre The date of Substantial Compl date>> NOTE: This Change Order doe: Contract Time which have bee upon by all parties in which th ARCHITECT: < <blank 4="">> SIGNATURE:</blank>	his change order eased/decreased/by (< <cco letion as of the date of this C s not include adjustments to in authorized by Construction e Change Order is then exect CONTRACTOR:</cco 	approved time ex hange Order ther the Contract Sum, n Change Directive uted to supersede	S< <revised project="" value?<br="">tension days>>) days afore is <<revised completio<br="" contract="">Guaranteed Maximum Price, or until the cost item has been agreed the Construction Change Directive. OWNER: <<<u><cblank 6="">></cblank></u> SIGNATURE:</revised></revised>					
New contract sum including th The contract time will be incre The date of Substantial Compl date>> NOTE: This Change Order doe: Contract Time which have bee upon by all parties in which th ARCHITECT: << <blank 4="">> SIGNATURE: PRINTED NAME/TITLE:</blank>	his change order eased/decreased/by (<<0CO letion as of the date of this O s not include adjustments to in authorized by Construction e Change Order is then exect CONTRACTOR: CONTRACTOR: SIGNATURE: PRINTED NAME/TITL	approved time ex hange Order there the Contract Sum, n Change Directive uted to supersede	S< <revised project="" value?<br="">tension days>>) days efore is <<revised completio<br="" contract="">Guaranteed Maximum Price, or until the cost item has been agreed the Construction Change Directive. OWNER: <<blank 6="">> SIGNATURE: PRINTED NAME/TITLE:</blank></revised></revised>					
New contract sum including th The contract time will be incre The date of Substantial Compl date>> NOTE: This Change Order doe: Contract Time which have bee upon by all parties in which th ARCHITECT: << <blank 4="">> SIGNATURE: PRINTED NAME/TITLE: <<<blank 7="">></blank></blank>	his change order eased/decreased/by (<<0CO letion as of the date of this O s not include adjustments to in authorized by Construction e Change Order is then exect CONTRACTOR: < CONTRACTOR: CONTRACTOR: SIGNATURE: PRINTED NAME/TITL < <blank 8="">></blank>	approved time ex hange Order there the Contract Sum, n Change Directive uted to supersede	S< <revised project="" value?<br="">tension days>>) days efore is <<revised completio<br="" contract="">Guaranteed Maximum Price, or until the cost item has been agreed the Construction Change Directive. OWNER: <<blank 6="">> SIGNATURE: PRINTED NAME/TITLE: <<blank 9="">></blank></blank></revised></revised>					

Name the template and save it as an MS Word (.docx) document.

Returning to the Change template register, select the **Add** \odot icon to create a new Change template. This opens the Change template details page.

Overview - Contract template Details

ltem Number	Name	Definition
1	Preview with sample	Opens a preview of your template using the default sample data.

Overview -	Contract	template	Details ((continued)
------------	----------	----------	------------------	-------------

ltem Number	Name	Definition
	data	
2	Create new version	Creates a new version of the template. This feature lets you update the version of a template rather than inactivating it and then creating a new one.
3	Control buttons	Lets you to cancel the template creation, save and publish or only save to access later.
4	Detail area	Lets you name the template, specify the template type and language, and add a description of the template.
5	Tags and sample template	Area where you can view and download the general or collection table tags.
6	Template file	Attach the template file which was created with the downloaded tags.
7	Attributes	Lets you add one or more market attributes that provide additional ways to filter templates. Organization-level templates associated to markets are automatically switched to <i>On</i> for Project use on any project with the same market listed in the Project details. When a market is added to the project details, the templates with the associated market are enabled for the project.

				A
Create New Version				3 Cancel Save and publish
			•	
Details 4		Version 1 - DRAFT	Tags 5	
*Template name	Template type		View general tags	
Temp 1933516	Client change order	•	View collection table tags	
*Description	963 Template language			
jncafyilcdpiducosmyqprbatzuijk1933516	English - EN	•	Template file	
			Association xlsx 👄 Validated 🖌	
Attributes			Collection tables validated 🖌	
Market				
(+) Add Market				

New templates appear in the Change templates list in both Organization settings and Project settings.

2.17.1 TEMPLATE VERSIONS

When you update templates with additional information, you can create a new version of the template instead of deactivating it. The Create new version button is enabled when you edit a template.

When you create a new version, the version numbering starts after the previous version. The new template version starts in the draft state. You can edit any of the fields except the template type and language. You can then attach the new file. Only one draft version can exist for a template at a time.

Only one version of a template can be active at a time. After you publish a new version, the previous version becomes inactive and is removed from the Templates register.

The Version column of the Templates register lets you see the template version number. When you click the version number, the template version history is shown. The template names are linked to the Template details page, so you can quickly view the detail information.

						PROJECT DETAILS	NOTIFICATIONS	WORKFLOW	CONFI	GURATIONS	CHANGE TEM	PLATES	HANGE CUSTO	м			
							Project l	evel templates	rganization le	vel templates	DocuSign set	up					
Ð																	
	Template	Description	👳 Status		Version	n 1. 📼	Template type	Template file		Created date		Created by		Modified da	ite 👻	Modified by	
	ORG A123	ORG A1 TEST	Published		3		Potential change order	PCO templat	-valid.docx	04/26/2022		Organizat	on level	04/26/202	2	Auto Test1	
	test today.proj 2a	test today	Draft		3		Issue			05/10/2022		Emily Barl	er	06/07/202	2	Mandy Becke	
	test today.proj 2	test today	Published		2		Issue	test template	docx	04/29/2022		Emily Barl	er	05/10/202	2	Emily Barker	
		new temp 4/15	InActive		1		Issue	links.docx		04/15/2022		Organizat	on level	06/07/202	2	Mandy Becker	
	new org tem 4/15	new org tem 4/1															×
	template testing	template testing	Template V	ersion Histo	ry												
	Temp4017595	usfsbabjaesfdqb															
	Temp830028	ejrhfydodlsdgmb	Version	Status		Templa	te type	Template name		Description	1		Created date		Created by		
	Temp1291373	gixmteedlpkprpn	3	Published		Potenti	al change order	<u>ORG A123</u>		ORG A1 T	EST		04/20/2022		Auto Test1		
	Iemp4965956	zbfmduwtxewzm	2	InActive		Potenti	al change order	ORG A11		ORG A1 T	EST		04/26/2022		Auto Test1		
	Temp3170749	qaldfribduwduqu	1	InActive		Potenti	al change order	ORG A1		ORG A1 T	EST		04/26/2022		Auto Test1		
	test today	test today org															
		test today															
	hop@14	sdfsdf														Close	
	Story testing	Story testing													1	CHUSE	
	Story testing 1	Story testing															
	<u>aaa</u>	aaa	Published		1		Client change order	IssueLog_20	22-April-29	05/10/2022		Organizat	on level	05/10/202	2	chandrakala o	
	Vendor collection	Vendor collection	Published		1		Issue	example coll	ection xlsx	05/11/2022		Organizat	on level	05/11/202		lav kumar	

The Version history subtab contains links to previous versions of a template. The version history shows all versions in descending order, including inactive versions.

								TEMPLATE DETAILS	VERSI	ON HISTORY											
																				Clear all filter	0
Version 5	Template type 🖷	Template name	÷	Description	Ŧ	Status	÷	Template file	÷	Created date	÷	Created by	÷	Modified date	ę	Modified by	ę	Template language	÷	Market	-
3	Potential change or	ORG A123		ORG A1 TEST		Published		PC0 template-valid.docx		04/26/2022		Auto Test1		04/26/2022		Auto Test1		English			
2	Potential change or	ORG A11		ORG A1 TEST		InActive		PC0 template-valid.docx		04/26/2022		Auto Test1		04/26/2022		Auto Test1		English			
1	Potential change or	ORG A1		ORG A1 TEST		InActive		PC0 template-valid.docx		04/26/2022		Auto Test1		04/26/2022		Auto Test1		English			

Versions of organization-level templates are available for use at the project level, but you can only create a new version of those templates at the organization level.

2.17 STEP BY STEP 1 – BUILD A CHANGE TEMPLATE

1. From the Organization settings page, select Change Templates.

				CUSTOM LISTS	CHANGE EMPLATES								
÷													
	Template	Description	Status	Template file	Created date	Created by	Modified date	Modified by					
	Testing doc_bug_1	testing	Published	Test doc for templates	08/02/2019	Johnathon Harper	08/02/2019	Johnathon Harper					
	Testing 688955	Test123	InActive	Sample CCO Template	06/24/2019	Johnathon Harper	06/24/2019	Johnathon Harper					
	testing	testing	InActive	Change Sample Templ	06/19/2019	Sathya Jayaraj	06/19/2019	Sathya Jayaraj					

2. Click the View available tags icon, and then select General tags to view the tags.



• The Change writer tags document opens.

tilize below tags to build cl ocument.	hange templates. Tags in the	e template would be replaced with the corresponding tag values, while generating cl	hange 💽 C
Tag name 📃	Location source	Description =	Example
< <project id="">></project>	Project details	The project number	123456
< <project name="">></project>	Project details	The name of the project	Metro Power Station
< <project address1="">></project>	Project details	The address of the project	1700 Northwest Street
< <project address2="">></project>	Project details	The address of the project	Unit 3
< <project city="">></project>	Project details	The city of the project	Scottsdale
< <project country="" or="" re<="" td=""><td>Project details</td><td>The country of the project</td><td>US</td></project>	Project details	The country of the project	US
< <project code="" postal="">></project>	Project details	The postal or zip code of the project	85201
< <project state="">></project>	Project details	The state of the project	Arizona
< <contract number="">></contract>	Project details	The projects contract number	CA 139481029
< <project contract="" date<="" td=""><td>Project details</td><td>The date of the Project contract</td><td>17-03-2020</td></project>	Project details	The date of the Project contract	17-03-2020

- 3. Select the **Export tag list** icon to export it to your hard drive as an Excel file.
- 4. Save the exported file.

	What do you want to do with Export.xlsx (3.2 KB)? From: t01in8-qa-191-sea.hds.ineight.com	Open	Save	^	Cancel	\times
--	--	------	------	---	--------	----------

5. Open the Excel file you just saved. The value in the Applicable for column indicates the template type that can use the tag.

	А	В			E
Tag name		Location source	Description	Example	
< <project< td=""><td>ID>></td><td>Project details</td><td>The project number</td><td>123456</td><td></td></project<>	ID>>	Project details	The project number	123456	
< <project< td=""><td>name>></td><td>Project details</td><td>The name of the project</td><td>Metro Power Station</td><td></td></project<>	name>>	Project details	The name of the project	Metro Power Station	
< <project< td=""><td>address1>></td><td>Project details</td><td>The address of the project</td><td>1700 Northwest Street</td><td></td></project<>	address1>>	Project details	The address of the project	1700 Northwest Street	
< <project< td=""><td>address2>></td><td>Project details</td><td>The address of the project</td><td>Unit 3</td><td></td></project<>	address2>>	Project details	The address of the project	Unit 3	
< <project< td=""><td>city>></td><td>Project details</td><td>The city of the project</td><td>Scottsdale</td><td></td></project<>	city>>	Project details	The city of the project	Scottsdale	
< <project< td=""><td>country or region>></td><td>Project details</td><td>The country of the project</td><td>US</td><td></td></project<>	country or region>>	Project details	The country of the project	US	
< <project< td=""><td>postal code>></td><td>Project details</td><td>The postal or zip code of the project</td><td>85201</td><td></td></project<>	postal code>>	Project details	The postal or zip code of the project	85201	
< <project< td=""><td>state>></td><td>Project details</td><td>The state of the project</td><td>Arizona</td><td></td></project<>	state>>	Project details	The state of the project	Arizona	
< <contrac< td=""><td>t number>></td><td>Project details</td><td>The projects contract number</td><td>CA 139481029</td><td></td></contrac<>	t number>>	Project details	The projects contract number	CA 139481029	
< <project< td=""><td>contract date>></td><td>Project details</td><td>The date of the Project contract</td><td>17-03-2020</td><td></td></project<>	contract date>>	Project details	The date of the Project contract	17-03-2020	
< <date pr<="" td=""><td>oject started>></td><td>Project details</td><td>The date the Project started</td><td>01-09-2019</td><td></td></date>	oject started>>	Project details	The date the Project started	01-09-2019	
< <origina< td=""><td>contract completion date></td><td>Project details</td><td>Date project started + original duration</td><td>04-03-2021</td><td></td></origina<>	contract completion date>	Project details	Date project started + original duration	04-03-2021	
< <origina< td=""><td>duration>></td><td>Project details</td><td>Contract time duration in calendar days</td><td>550</td><td></td></origina<>	duration>>	Project details	Contract time duration in calendar days	550	
< <origina< td=""><td>project value>></td><td>Project details</td><td>The original value of the Project contract</td><td>\$50,00,000.00</td><td></td></origina<>	project value>>	Project details	The original value of the Project contract	\$50,00,000.00	
< <sum of<="" td=""><td>all executed CCOs>></td><td>Project contract summary (sigma)</td><td>Sum of all executed change orders to date (except dropped)</td><td>\$1,00,000.00</td><td></td></sum>	all executed CCOs>>	Project contract summary (sigma)	Sum of all executed change orders to date (except dropped)	\$1,00,000.00	
< <current< td=""><td>project value>></td><td>Project contract summary (sigma)</td><td>The original project contract value + the sum of executed change</td><td>\$51,00,000.00</td><td></td></current<>	project value>>	Project contract summary (sigma)	The original project contract value + the sum of executed change	\$51,00,000.00	
< <cco td="" val<=""><td>ue>></td><td>Current CCO</td><td>The value of the selected change order</td><td>\$59,137.50</td><td></td></cco>	ue>>	Current CCO	The value of the selected change order	\$59,137.50	
< <revised< td=""><td>project value>></td><td>Calculation</td><td>Total sum of the current project value + current change order val</td><td>\$51.59.137.50</td><td></td></revised<>	project value>>	Calculation	Total sum of the current project value + current change order val	\$51.59.137.50	

- 6. Copy and paste the tags into the Word or Excel document you are creating as your new Change document.
 - Tags must be inserted exactly as they appear in Tag name column.
 - A template can use tags that are applicable to one template type plus the tags that are applicable to all templates.

NOTE When adding tags for DocuSign, change the font color to white, so the tag name does not show in the generated document.

- 7. If needed, you can insert one or more collection tables that are applicable to the template type. Refer to <u>Collection tables</u> for information about building a collection table.
- 8. After all tags are inserted into the Word or Excel document, name the new template as [your initials] contract template.
- 9. Save it as a Word (.docx) or Excel (.xlsx) file.
 - Below is an example of a document with inserted tags

PROJECT: <mark><<project name="">></project></mark> TO CONTRACTOR:	CHANGE ORDER NUMBER: ID>> DATE: < <cco created="" date="">> ARCHITECT'S PROJECT NUMI CONTRACT DATE:<contract date>> CONTRACT FOR:</contract </cco>	CCCO ARCHITECT: □ CONTRACTOR: □ BER: OTHER: □ BER:
THE CONTRACT IS CHANGED A	AS FOLLOWS:	
< <cco description="">></cco>		
riginal Contract Sum		<< Change original contract sum
he net change by previously authori	ized change orders	< <change ccos<="" due="" executed="" in="" td="" to="" value=""></change>
ne net enange by previously utenon		
he total value prior to this change o	rder	<< Change total prior to this CCO
he total value prior to this change o alue of current CCO in review	rder	< <change cco<br="" prior="" this="" to="" total=""><<change in="" sum<="" td=""></change></change>
he total value prior to this change o alue of current CCO in review lew contract sum including this chan The contract time will be incre The date of Substantial Comple	rder nge order ased/decreased/by (<mark><<cco approved<="" mark=""> etion as of the date of this Change Or</cco></mark>	< <change cco<br="" prior="" this="" to="" total=""><<change in="" sum<br=""><<change contract="" new="" value<br="">i time extension days>>) days der therefore is</change></change></change>
he total value prior to this change o lalue of current CCO in review lew contract sum including this chan The contract time will be incre The date of Substantial Comple NOTE: This Change Order does Contract Time which have been upon by all parties in which the	rder ased/decreased/by (<cco approved<br="">etion as of the date of this Change Or : not include adjustments to the Contr n authorized by Construction Change of e Change Order is then executed to su</cco>	Change total prior to this CCO < <change in="" sum<br=""><<change contract="" new="" value<br="">i time extension days>>) days der therefore is act Sum, Guaranteed Maximum Price, or Directive until the cost item has been agreed persede the Construction Change Directive.</change></change>
he total value prior to this change of alue of current CCO in review lew contract sum including this chan The contract time will be incre The date of Substantial Comple NOTE: This Change Order does Contract Time which have been upon by all parties in which the ARCHITECT:	rder nge order ased/decreased/by (<cco approved<br="">etion as of the date of this Change Or in ot include adjustments to the Contr n authorized by Construction Change is Change Order is then executed to su CONTRACTOR:</cco>	Change total prior to this CCO. Change in sum: Change new contract value I time extension days>>) days der therefore is act Sum, Guaranteed Maximum Price, or Directive until the cost item has been agreed persede the Construction Change Directive. OWNER:
NOTE: This Change Or Jerrosary outloor lalue of current CCO in review lew contract sum including this chan The contract time will be incre The date of Substantial Comple NOTE: This Change Order does Contract Time which have been upon by all parties in which the ARCHITECT:	rder nge order ased/decreased/by (<cco adjustments="" approved="" as="" authorized="" by="" c="" change="" construction="" contr="" contractor:="" date="" etion="" executed="" i="" include="" is="" n="" not="" of="" or="" order="" signature:<="" su="" td="" the="" then="" this="" to=""><td><pre> <td< td=""></td<></pre></td></cco>	<pre> <td< td=""></td<></pre>
he total value prior to this change of alue of current CCO in review lew contract sum including this chan The contract time will be incre The date of Substantial Comple NOTE: This Change Order does Contract Time which have been upon by all parties in which the ARCHITECT: SIGNATURE: PRINTED NAME/TITLE:	rder nge order ased/decreased/by (<cco adjustments="" approved="" as="" authorized="" by="" c="" change="" construction="" contr="" contractor:="" date="" etion="" executed="" i="" include="" inot="" is="" n="" name="" of="" or="" order="" printed="" signature:="" su="" td="" the="" then="" this="" title:<="" to=""><td><pre> <</pre></td></cco>	<pre> <</pre>

10. Return to the Change templates tab, and then select the **Add template** icon.

General	(+)	2 8		
		Template 📜 👘	Description -	Status
Prograss		Testing doc_bug_1	testing	Published
		Testing 688955	Test123	InActive
() Contract		testing	testing	InActive

- 11. In the Add a new template dialogue, fill in the fields with the following:
 - Template name: Use the name you named your template
 - Description: Test contract template

12. Under the Template file section, select **No template file attached**.



- 13. Find and select the contract template you created earlier in this Step by Step.
- 14. After the contract template is uploaded, click Add.

*Template file	
Add file here	SELECT FILE 🔻
	G My computer

15. A validation notice is shown.



- If the document was not validated, select the not validated link to view the errors, fix the errors in your Word document, save, and publish again.
- **NOTE** The file can be closed and published with invalid tags. During change order generation, invalid tags are not replaced with contract data. The invalid tag displays in the generated contract as it was inserted.
- 16. Click Save.
 - To check the formatting of the change document, click Preview with sample data. A
 preview document opens in a separate window, which uses sample data from the tag
 list. After you have viewed the sample, click Close. If you need to make changes to
 the document, you can update the source and reattach it.

17. Click Save and Publish.

Overview - Change Template Header

ltem number	Name	Definition
1	Template	The name you gave as the changed template.
2	Description	The description you used when creating the template.
3	Status	The status of the template after created. The status will show Draft, Published or Saved.
4	Template type	The type of change document that can use the template. Valid types are Client change order, Potential change order, Issue, and Other.
5	Template file	Name of the file which was uploaded into the contract writer.
6	Created date	Date that the contract template was created.
7	Created by	Name of person who created the template.
8	Modified date	Date that the last modifications were made to the template.
9	Modified by	Name of the person who made the last modification to the template.
10	Template language	The language of the tags in the template.

	0	0	3	4	5	6	0	8	9	10
	Template	Description	Status	Template type	Template file	Created date	Created by	Modified date	Modified by	Template language 👘 🔲
0	PCO level template	PCO level template	Published	Potential change order	docx	04/05/2021	Lavkumar Pandey	04/05/2021	Lotter Terms	EN ^
0	Issue level template 1	Issue level template 1	Published	Issue	docx	04/05/2021	Lavkumar Pandey	04/05/2021	contention Provide	EN
0	Check at Project level for P	Check at Project level for P	InActive	Issue	docx	04/05/2021	Lavkumar Pandey	04/05/2021	Contractor Provide	EN
	AF Spanish vendor 1	AF Spanish vendor 1	Published	Issue	100.00	03/31/2021	asad fathima	03/31/2021	1000 Tel: 100	ES-MX
	AF English PCO Workflow 1	AF English PCO Workflow 1	Published	Potential change order	_xlsx	03/31/2021	asad fathima	03/31/2021	1000 TOTAL	EN
	AF_English CCO workflow	AF_ English CCO workflow	Published	Client change order	<u>xix</u>	03/31/2021	asad fathima	03/31/2021	1000	EN
	AF Workflow English PCO	AF Workflow English PCO	Published	Potential change order	<u>xisx</u>	03/31/2021	asad fathima	03/31/2021	and the second	EN

2.18 TEMPLATE SETTINGS SUBTAB

Template settings let you configure characteristics for each template type at the organization level. The Template settings subtab (Settings > Change templates > **Template settings**) contains controls for editing, watermark stamps, and PDF output.

			Templates Template settings			
					Ca	ncel Save
femplate co	onfigurations			-		
Template type	4	Now users to edit the document during generation?	Require watermark stamp upon document generation?	Output as PDF only?	*End watermark requirement event	٩
Issue		0	\bigcirc	Θ	Always required	•
Potential change order		0	\odot	Θ	PCO approval	•
Client change order		0	0	Θ	CCO approval	•
Other		0	Θ	Θ	Select one	
atermark stamps added h pon 'Save', all modification coel file format does not sa	here will be available within the 'Select watermark stamp' drop ns will be reflected in the 'Select watermark stamp' drop apport watermark stamp.	p' drop down list for all generated Change documents. p down list.				
• 🗹 😣)					
English				Español		
	Watermark stamp text		Layout	Watermark stamp	text	
			Herizontal			*
			Diagonal			
0			Diagonal			
0			Horizontal			

ltem number	Name	Definition
1	Allow users to edit the document during generation	Indicates whether users can edit the contract document when it is in the review stage. When set to <i>Yes</i> , a user can edit the contract document from the Review templates dialog box. When set to <i>No</i> , the contract document cannot be edited from the dialog box, and the user must edit contract information in Contract.
2	Require a watermark stamp upon document generation	Indicates whether to apply a watermark stamp when the document is generated. When set to <i>Yes</i> the watermark is applied to the document, but is removed after the document has been approved. You can configure the watermark text and settings in the Watermark stamp section of this page. When set to <i>No</i> , the contract document does not have a watermark.
3	Output as PDF only	Indicates whether you can only generate a PDF when you create a contract document. When set to <i>Yes</i> , you cannot generate a Microsoft Word or Excel document or make changes to the contract files individually.
4	End watermark requirement event	Indicates the change order approval event that must occur before the watermark stamp is no longer required for this template type. For example, if you set the End watermark event field to CCO approval, the watermark is no longer required after the CCO is approved. You can also indicate that the watermark stamp is always required regardless of the change order approval event.

ltem number	Name	Definition
		The watermark is removed from the generated document when the document is approved. This field is enabled only when the Require watermark stamp upon document generation toggle is set to <i>Yes</i> .

Because a change document might have templates defined at the issue, PCO, and CCO levels, Change uses the following conditions to determine which setting has precedence when there is a difference in settings:

- If the Allow users to edit the document during generation toggle is set to *No* for any of the templates, Change gives precedence to that setting, and no editing is allowed for any template.
- If the Require watermark stamp upon document generation toggle is set to *Yes* for any of the templates, Change gives precedence to that setting, and a watermark is required for all templates.
- If the Output as PDF only toggle is set to *Yes* for any of the templates, Change gives precedence to that setting, and only PDF output is available for all templates.

The Watermark stamp section lets you define watermark text and layout for the Select watermark stamp drop-down list in the Change writer. You can define the text for all languages used in your templates. The language of the watermark matches the language of the template.

The watermark requirement events that are available vary by template type. The options are as follows:

Template type	Available end watermark events
Issue	Always required
PCO	Always required PCO approval
CCO	Always required CCO approval CCO execution
Other	Always required

2.19 CHANGE CUSTOM LABELS

Change has settings that let you customize field names in the application to align with your business terminology. You can customize the following fields in all languages supported in the InEight product.

- Allowance category
- Change condition
- Change order
- Client
- Client change order
- CCO
- CO
- Issue
- · Potential change order
- PCO
- Scope
- Source/cause
- Vendor

					Enable custom labels	🖵 Clear all filters () 🛛
	Field name =	Custom label - EN	Custom label - ES-MX	Custom label - FR-CA	Custom label - PT-BR	Custom label - NL
0	Change order					
	Client change order					
\bigcirc	Client CO					
\bigcirc	CCO					
	C0					
	Potential change order					
	Potential CO					
	PCO	PCO	PCO	PCO	PCO	PCO
0	Vendor	Vendor	Vendor	Vendor	Vendor	Vendor

You can enter the label text for each of the fields in each language. The custom text replaces the default text in field names, tab names, messages, templates, and other labels throughout the system.

The Enable custom labels toggle lets you switch between using your custom labels and Change's default labels. When switched on, Change uses the defined labels in all languages. If you have not defined a label, Change uses the default text for that field. When off, Change uses the default labels for all fields in all languages. You can refer to the Change Custom Labels tab in Project settings as a legend showing the custom labels and how they are referred to in tags and in the Change user interface.

When custom labels enabled at the organization level do not apply to your project, you can switch the **Enable custom labels** toggle in the project settings to Off. When custom labels are disabled at the organization level, you must use the default labels for all projects.

2.20 CHANGE PROJECT SETTINGS

Prior to initiation, the project settings are significant to successfully manage a project within Change. Project settings are distinct from organization settings, which are defined by the administrative level of your organization. The image below shows how to get to the project settings from the Main menu.

Ξ	命 Welcome	
	INEIGHT®	
MB		
<bac< th=""><th>÷k</th><th>-</th></bac<>	÷k	-
۲	Model	
	Document	
	Schedule	
*	Design	~
::	Estimate	ø
(÷)	Control	~ <mark>.</mark>
*	Plan	~
8	Progress	~
٩	Capital	
6	Contract	~
	Change	
(2)	Compliance	
6	Report	
(Explore	~
PRO	JECT SETTINGS	
Projec	ct home	
Proje	ct details	
Settin	ıgs	
Workf	flows	
Assig	ned users	

ធ & Links Control Ō Manage budgets and forecasts Add project image Organization um of 540px x 360p Minim InEightU Learn.InEight Progress Project () Work packaging Daily planning Group work into plans and pac (+)Time center Weekly time sheet Capital 6 Contract Project notes 6 Contracts ß Bid packages Status Contracts Executed Change Non-executed Compliance Beport Report 🕸 Settings () Explore Project and application settings Dashboards API documentation Manage settings Extensions Billing Project contract summary Change milestones Project home Actual values Schedule Date Calendar d Project details Original project value \$0.00 Contract date 03/10/2021 Settings Workflo Date project started 04/01/2021 \$5.595.517.99 Executed CCOs Assigned users Original contract co... 12/16/2021 Assigned contacts \$5,595,517.99 Current project value

The image below shows you the two ways you can access Project settings from the Project home page.

NOTE Some settings defined at the organization level will limit the settings you can define at the project level.

The following steps walk you through how to navigate to project settings.

2.20 STEP BY STEP 1 – OPEN PROJECT SETTINGS

- 1. From the home page, click the **Main menu** icon on the upper-left side of the page.
- 2. Click the All projects & organizations menu option.
- 3. On the Projects tab of the All projects and organizations page, search for the Steel Training job.

	🗿 🛛 All proje	cts & organiz	zations -							?	8
					PROJ	ECTS	ORGANIZATIONS				
(•									i	Q
	ID †		Name		Status 😑	Organization	-	Created by			×
	103631		CJ - TP - San Angelo		Active	3 - Power : SE2	2020 - Kiewit Power Delivery	Shannon Pechar	Search		Q
	103632		MEC - NY Warehouse 201	8	Active	1: SD3007 - Inf	rastructure East (SVP Level)	Danielle Sandilar			
_											

4. After you find the project, click the project link in the Name column. The Project home page opens.

All projects & organizations							
				PROJECTS	ORGANIZATIONS		
(+	\odot \blacksquare						
	ID =	Name -	Status 😑	Organization 📃	Created by 📃	Created on	
	105091	Steel Training Job	Active	S100000 - PKS Incs	jeremy cheek	03/07/2019 11:12:14 AM	
	105092	Steel Training Job 2	Active	S100000 - PKS Incs	jeremy cheek	04/23/2019 11:20:39 AM	
	105093	Steel Training Job 3	New	S100000 - PKS Incs	jeremy cheek	04/23/2019 11:21:13 AM	
	105094	Steel Training Job 4	New	S100000 - PKS Incs	jeremy cheek	04/23/2019 11:21:57 AM	
	105095	Steel Training Job 5	New	S100000 - PKS Incs	jeremy cheek	04/23/2019 11:22:25 AM	

5. Click **Settings** from the Main menu. The Project settings page opens.



6. Click the **Change** icon in the left side navigation. You can use the expansion arrows to see the icons with product names.

_	no 7 Settings	
»		
\odot		
(})	三 命 / Settings	
•••	SETTINGS 《	1
*	General	
8	🛞 Design	
(1) (1)	📀 Control	
0	Plan	
	Progress	
®	(P) Capital	
()	(6) Contract	
	🖄 Change	
	(Compliance	
	(Explore	F

2.20.1 IDF RESPONSE CODES

The Issue Documentation Form (IDF) section of Change allows you to view the IDF field name that is mapped to the response code by toggling the switch to on (green check).

Response code	IDF field					
IssName	Issue name					
IssSDate	Issue start date					
FCon	Field Contact					
Desc	Description					
VerNClient	Have you verbally notified the client?					
WorkPlanID	Daily plan ID of impacted work					
WrkStrtd	Has work started?					
Schimp	Does this impact the scedule?					

2.20.2 NOTIFICATIONS

Under Notifications, select which notifications to turn on. Select the time of the email and use the drop-down list to assign users or roles.

2.20.2.1 WRITTEN NOTIFICATION TIME REQUIREMENT

The first section of the notifications sections allows you to control within how many days the project must notify the client of issues based on the prime contract. It also allows for the scheduling of email times and users/roles assignments.

/hat is the written notification time re	equirement from Prime Contract?		
	61		
lint: Enter number of business days			
end notification email to recipients a	is a reminder to send written notification of		
isue per Prime Contract?		Send email at selected time 8:00 AM	(
isue per Prime Contract?	reminder 1 day before expiration of written	Send email at selected time 8:00 AM • Users	(
isue per Prime Contract?		Send email at selected time 8:00 AM	

When written notification is set up, the user receives the following notification email, where the links direct to the specific issue details or the issue log.

IM InEight Mail	Issue written notice requirement
	INEIGHT 🛞
	The following 2 issues on have only <u>1 day remaining</u> before the contractually required written notice must be submitted.
	Issue 533 - 665351 Test 2 Issue 531 - issue regg1 You can view all these issues in the Issue Log.
	This is a system generated email. Do not reply.

2.20.2.2 NOTIFY SCHEDULER OF ISSUES

This is an email notification that is sent to recipients based on schedule impact of an identified issue. The email notification includes new issues that have a Yes selected for scheduled impact within the Issue Detail page.

Notity scheduler of issues		
Send notification email to recipients based on schedule impact of identified issue?	Send email at selected time	
\oslash	11:00 AM	G
Assign roles or users to receive notifications on schedule impact	* Users	
Users •	Johnathon Harper 🗙	

2.20.2.3 NOTIFY ASSIGNED TO PERSONS

The user receives a summary notification of issues assigned to them, where the links direct to the specific issue details.

Notify 'Assigned to' persons		
Send notification email summary to the selected 'Assigned to' persons on identified	Send email at selected time	
issues?	11:00 AM	G

Example 1: Email with notification that an issue has been created and needs approval.

Issue Name SC - lighting	<u>Issue start date</u> 06/13/2019	Description lights need replacement	<u>Created date</u> 06/13/2019	Created by susan cappellon		
You can approve/reject this pending issue directly in the Pending Issue log.						
If you need to edit any Issue details, you can select the pending issue from your Action Items tab.						
This is a system g	enerated email. Do not repl	у.				

Example 2: Email with notification that an issue has been approved.

The following issue has beer	approved by paul trippi		
Issue name Plumbing piping	Issue start date 06/14/2019	Description	Approver notes
This is a system generated e	mail. Do not reply.		
InEight Change			
	This is a system of	email generated by . Do not reply.	I

2.20.2.4 NOTIFY CONTROLLER OF ADJUSTMENTS

The Notify controller of adjustments settings let you notify a user when a contract adjustment or budget move has been sent to InEight Control.

\odot	08:00 AM	C
Assign relation users to receive patifications on askedula impost	tilicare	
Assign roles of users to receive notifications of schedule impact	- Users	

Items are sent to Control when a client change order is executed. The email notification includes all adjustments that have been sent to Control.

2.20.3 WORKFLOW

One of the primary objectives of Workflow within Change is to provide users, or roles with appropriate access to approve issues, PCOs, or CCOs. Approvers will see different tabs on the Change register than a user with only viewer access.

2.20.3.5 NEW ISSUE APPROVAL SETUP

Setting up a workflow for new issue approvals lets you specify approval steps and the users or roles responsible. The steps are performed for all new issue approvals in the project. The workflow cannot be edited in an individual new issue.

New issue approval work flows are configured on the project Settings > Workflow Assignments > New Issue approval setup page.

PROJECT DETAILS NOTFICATIONS WORKTLOW CONFIGURATIONS CHANGE TEMPLATES CHANGE CUSTOM	
New issue approval setup PCO approval setup CCO approval setup CCO execution setup Document approval setup Gro	up approver setup
	Cancel Save
Workflow steps added here are required at the New issue level and cannot be edited in an individual New issue	Add approval ×
	Approval step
Approval Steps Users/Roles	*Step title
Approval step 1 Account Administrator	
	*Assign approvers
	Users O Roles
	Hint: Type 'abc'
	Cancel

2.20 STEP BY STEP 2 – ADD A NEW ISSUE APPROVAL WORKFLOW

Add a new approval workflow to specify how a new issue gets approved.

- From the New approval setup page (Settings > Workflow Assignments > New Issue approval setup), click the Add approval icon. The Add approval slide-out panel opens.
- 2. Enter a title for the approval step.
- 3. Select whether the step is to be approved by a specific user or a user in a role, and then enter the name of the user or role. User names include email addresses to help you distinguish which user to enter.
- 4. Click Add. The step is added to the grid.
- 5. Repeat steps 1-4 for each approval step. You can use the up and down arrows to change the order of the steps.
- 6. Click Save.

When there is at least one step in the workflow, any new issues go into the New issue log with a status of In approval, and an email notification is sent to the approver.

2.20.4 PCO AND CCO APPROVALS

The Workflow Assignments tab of your project settings is where you set up approval processes for approving PCOs and CCOs. The settings include defining the number of steps in approval processes and making assignments of who approves each step.

2.20.4.6 GROUP WORKFLOWS

Change orders often have varying approvers, which can result in changing the project settings for each change order. Configuring approver group workflows provides alternatives in the approval process, which saves you from manually altering the workflow at the project level each time you require a change-specific workflow.

An approver group is a set of users or roles in steps, similar to an entire workflow. You can set up multiple groups in a single step in a workflow. For example, when a project is done in segments, you might have a different set of approvers for change orders in each segment. Instead of setting up a workflow that applies to the whole project, you can create a multistep group workflow for each segment. You can have one or more group steps in a workflow.

You can configure groups from the Group approver setup page (Project > Settings > Change> Workflow Assignments > **Group approver setup**). Each group can act as its own workflow. In the sample image, a project has two segments, each with a different field engineer and project engineer. The business manager is the same for both segments. A business manager only group is set up for a flow that only needs approval from the business manager, such as resubmitting a previously rejected payment form. All PCOs and CCOs in the project can use the groups.

		PROJECT DETAILS NOTIFICATIONS WORKFLOW CONFIGURATIONS CHANGE TEMPLATES CHANGE CUSTOM LABELS	
		New issue approval setup Potential CO approval setup Client CO approval setup Client CO execution setup Client CO execution setup	Cancel
		Croup approvers setup here will be available for selection within the approval setup process for Potential CO's and Client CO's.	
٠			
	Group approval name & Approval steps	Users/Roles	•
	∧ Segment 1		 Add another step
	Field engineer	Aaron	ţ
	Project engineer	Bennet	
	Business manager	Chris	
	∧ Segment 2		Add another step
	Field engineer	Diego	
	Project engineer	Elle	
10	Business manager	Chris	
	∧ Business manager only		Add another step
	Business manager	Chris	
	Business manager only Business manager	chris	Add another st

When you start the approval process from the PCO or CCO, you can select the appropriate view when you click **Save and Start approval**.

2.20 STEP BY STEP 3 – CREATE GROUP WORKFLOWS

Use group approval workflows as a single step in a larger workflow. The group workflow is users or roles arranged in steps, like the steps used in thresholds. Group workflows let you set up segment-specific workflows to use when a change order has multiple segments or when only one user or role has to give an approval.

Only one step in an entire workflow can have a group step.

- 1. Go to the Group Approver Setup page (Project > Settings > Change > Workflow Assignments > **Group approver setup**).
- 2. Click the Add group approval button. The Add group approver slide-out panel opens.
- 3. Enter the group approver name (for example, Segment 1), the step title of the first step (for example, Field engineer), and the users or roles for that step, and then click **Add**. The group and its step is added to the grid.
- 4. To add another step, click **Add another step**, and then enter the step title and approvers. Click **Add**. Repeat this step as necessary to add all steps in a workflow.

You can change the order of the steps by selecting the step and using the up and down arrows. You can use the group approval as a step when setting up PCO or CCO approval workflow.

2.20.4.7 CHANGE ORDER APPROVAL SETUP

You can set up dollar-value thresholds for PCOs or CCOs at the project level. The project has an approval matrix where any amount dollar amount over the threshold set must be approved.

In the project settings, go to Workflow assignments > **PCO approval setup** or **CCO approval setup**.

PROJECT DETAILS	NOTIFICATIONS	W(ASS	ORKFLOW IGNMENTS	CONFIGURA	TIONS	CHANGE TEMPLATES	CHANGE CUSTOM LABELS	
New issue approval setup	Potential CO approval	setup	Client CO appi	roval setup	Client C	O execution setup	Group approver setup	

2.20 STEP BY STEP 4 – ADD A WORKFLOW ASSIGNMENT

Add a workflow assignment threshold to set the amount at which a PCO or CCO must be approved.

The workflow steps set at the project level are performed after those set at the PCO/CCO. However, if the value of the PCO or CCO is below the project level thresholds, the workflow thresholds set at the project level will not show in the Workflow Assignments.

- 1. Go to the Workflow Assignments tab.
- 2. Select the **PCO approval setup** or **CCO approval setup** tab. If an organization step shows a red hazard icon, you must edit the step to select specific users based on assigned roles.
- 3. Click the Add approval icon.
- 4. In the Add approval slide-out panel, enter the threshold amount and approval step title.

		MODIFICION	CHANGE CLICTOM
		PROJECT DETAILS NOTIFICATIONS ASSIGNMENTS CONFIGURATIONS CHANGE TEMPL	LATES LABELS
		New issue approval setup Potential CO approval setup Client CO approval setup Client CO execution setup	p Group approver setup
			Cancel Save
Workflow st	teps added here are required at the Potential C	O level and cannot be edited in an individual Potential CO.	Add approval
•	☑ ⊗		*Threshold amount
	Threshold amount & Steps	Users/Roles/Groups	Enter threshold amount
	∧ \$11.00		Approval step
	4		*Step title
			Enter step title
			*Assign approvers
			Cancel Add

5. Enter the roles, users, or groups in the Assign approval roles field. You can also assign an approver as required by the organization level when you edit a threshold at the project level. When you edit a project-level threshold, the Edit approval slide-out panel includes a view of the organization-level steps at the same threshold. If the organization-level steps require editing, you can assign a user. All other fields of the organization steps are read-only. If the organization-level steps do not require editing, the entire step is read-only.

		PROJECT DETAILS NOTIFICATIONS MORPLOW CONFIGURATIONS CHANCE TEMPLATES CHANCE CUSTOM LARGES	
		New issue approval setup Potential CO approval setup Client CO approval setup Client CO execution setup Document approval setup Group app	over setup
			Cancel Save
Workflow st	teps added here are required at the Potential CO I	vel and cannot be edited in an individual Potential CO.	Edit approval
		Marked items MUST be edited. Users need to be selected based on the assigned approver roles in order to approve workfli	*Threshold amount
			\$500.00
	r 🛛		
	Threshold amount & Steps	Users/Roles/Groups	Approval step - *Step title
Ø	∧ \$500.00		project approval step
	project approval step		
	Testing1	🕕 🛕 ss Role -	*Assign approvers Reles O Groups
			×
			Hint: Type 'abc'
			Step title
			(Canad)
			Assigned approver role
			ss Role -
			*Salect users based on the above assigned approver rela
			and a set of a set of an art is subject of the set of a set
			Hint: cack in the held to select users associated to the assigned approver role above
			Cancel Apply

Organization steps that require editing are marked with a red triangle in the approval details. If there are no project-level steps, you can edit the organization-level steps individually.

- 6. Click Add to complete.
- 7. If you want the approval workflow for the threshold to have additional steps, click **Add another step**. To change the position of a step, select it, and then use the up and down arrows to the right of the steps to move up or down.

NOTE Users, roles, or groups can be assigned to steps at a project threshold.

Project-level thresholds cascade to every PCO or CCO. In a PCO or CCO, you can add additional approval steps. These steps are first, regardless of the value of change order.

DOCUMENT APPROVAL SETUP

The Document approval setup lists document types for each document type instead of thresholds. For a document approval, you select a document type, and then add approval steps.

	PROJECT DETAILS NOTIFICATIONS ASSOCIATING CONFIGURATIONS CHANGE TEMPLATES LABELS	
	New issue approval setup Potential CO approval setup Client CO approval setup Client CO execution setup Document approval setup Group approver setup	
		Cancel
Morkflow steps adde	here are required at the -PC0/ICCD- level and cannot be edited at the individual level. Add approval	
Workflow type	Approval details	
(Potential CO)	*Document type	
(Client CO)	Marked items MUS1 be edited. Users need to be selected based on the assigned approver roles in order to appr	
	Retential Openanzual detaile	
	Potential co application	
	Change Change order	
	Document type & Steps Users/Roles/Groups Executed contract	
	Checklast Form	
	Checklist test () 🛕 1 Account Administrator- all permissions	
	I A Diagram Hint Type labe'	
	Step 1 project - group step Group A - MC - Bhu- G,Group B - MC only	
	C A Druft change order	
	ter AF	
	C ^ Submittal	
	ate 1	Cancel

2.20.5 OVERVIEW - CCO EXECUTION SETUP

Overview - CCO execution setup

ltem	Field	Definition
1	Allow users to approve/reject executed CCOs	This setting is automatically defaulted to No. If it is set to Yes, users are allowed to approve/reject issues. If the option is set to On, you cannot switch to Off, if there is anything active in Workflow. If you would like to turn off Workflow, you would need to approve/reject/cancel all the pending Workflows, and then turn it Off. You can set up the Workflow to receive one email for each CCO, or receive a summary email of pending CCOs. If you select the second option, then you can select a specific time that the summary will be emailed.
2	Receive on email for each CCO	User or Role will receive an email for each individual issue.
3	Receive a summary email of executed CCOs	User or Role will receive a summary/grouping formatted email, instead of receiving individual issue emails.
4	Assign user or roles for CCO approval	When choosing the users option, you can select from a list of users to send out emails. If you choose the roles option, you can choose for a list of pre-defined roles.

Overview - CCO execution setup (continued)

ltem	Field	Definition
5	Users/Roles	Based on what is chosen for "Assign users or roles for new issue approval", you will need to choose from a list of users or roles. User names include email addresses to ensure that you select the correct user account.

Allow users to approve/reject executed Client COs?		Receive one email for each execute Receive a summary email of all exe	d Client CO 2 cuted Client COs 3	
Δ		A		
Assign users or roles for Client CO approval	v	• Users	X XI	
		Users	Email address	
		Users	Email address	
		Users	Email address	
		Users	Email address dan. ∿©ii	
		Users Users dan m victor	Email address dani V@+ victor @+	
		Uters Uters dan m dan m	Email address dars vQv victor (Qv	
		Users Users Users Users Users	Email address dan: V@4 victor: © @4	
		Uters Uters dan m Uters	Email address dan v@s vector @s	

2.21 CONFIGURATIONS

Project-level configurations let you customize Change for your project. To see the configuration settings, go to project settings, and then select Change >**Configurations**. The configurable settings include the following:

- ID customization
- Pricing configuration
- Pricing markup
- Allowance category
- Dependent cost items
- Decimal precision
- Message configuration
- Responsible party
- Construction area for existing projects

- Custom lists
- eSign setup

2.22 ID CUSTOMIZATION

2.22.1 ID CUSTOMIZATION

Configuration settings for ID customization (Project settings > Change > Configurations > **ID Customization**) lets you override the organization-level numbering when projects are allowed to edit PCO or CCO IDs (that is, the Allow projects to edit settings check box at the organization level is checked). Override the organization-level numbering by setting the Generate Potential Change order IDs sequentially toggle to *Yes*. If set to *No*, IDs function as free text.

Detential change order			
Potential change order	hanna acdara		
Changes will default to future Potential change orders only.	nange orders.		
Generate Potential change order ID's sequentially?	Allow users to edit generated IDs?		
(e)	\odot		
Prefix	Starting number	Display format	
PC0 # -	000001	PCO # -000001	
Example: PCO -, PCO #	Example: 001		
Olivert also and an			
Client change order			
values established nere will create system generated sequential ID s for Client chan	ge orders.		
changes will delater to route client change orders only.			
Generate Client change order ID's sequentially?	Allow users to edit generated IDs?		
0	Θ		
Prefix	Starting number	Display format	
CC0#-	098	CCO # -098	
Example: CCO -, CCO #	Example: 001		

When the Generate Potential Change order IDs sequentially toggle is set to Yes, the Allow users to edit generated IDs toggle is shown, and the Prefix and Starting number fields are enabled. You can set the Allow users to edit Generated IDs to Yes to allow users to edit the generated IDs when creating a PCO or CCO or for a PCO or CCO that has been generated. When the field is set to No, users cannot edit the IDs and must use the IDs generated by Change.

You can edit the starting number field only if a PCO or CCO has not been created.

2.23 PRICING MARKUP

The Pricing markups Configurations (Project settings > Change > Configurations > **Pricing markup**) is used to bring over markup values into the Pricing summary and cost item pricing.

You can configure a predefined set of markups and either have the markups automatically populate in the Pricing summary tab or Cost item pricing tab for an issue, or otherwise choose to select specific markups from a list set.

ltem Number	Field	Definition
1	Markup Name	Actual name of markup.
2	Markup percentage	Amount added to the cost price of goods or services to cover overhead and profit. Percentages can have up to three digits before the decimal.
3	Applied to section	The section that the markup applies to, which includes Labor, Equipment, Materials, Small tools & supplies, Self-perform subtotal, Vendor Subtotal, Time related overhead, and Grand total.
4	Markup level	Markup calculation levels can be added to the Grand total in cost item pricing or to the Grand subtotal in the pricing summary. Levels 0-4 are available. Markups to other sections are automatically added at level 0. See <u>Markup calculation levels</u> for more information.
5	Auto Display	If set to <i>Yes</i> , the markup populates automatically under the Pricing summary column. If set to <i>No</i> , you have the option to bring in the markup, but the markup does not show automatically.

ate and mar	age markups to be available for selection at the Pricing summary level.	J				Freedal	50 107	
ngiisn	• Markup name	Markup Percentage	Applied to section	Markup level (1)	Auto display 5	Markup name	ES-MX	
	Enter markup name	0.00000	Select one +	Select one 🔹	\odot	Enter markup name		
	M1	10.00000%	Labor	Level 0	\odot	M1	\otimes	
	Grand total	10.00000%	Grand Total	Level 0	Θ	Grand total	\otimes	
	Indirect cost total	10.00000%	Indirect cost total	Level 0	Θ	Indirect cost total	\otimes	
	Non Billable	10.00000%	Non billables	Level 0	Θ	non Billable	\otimes	
ost item p	ricing markups							
ost item p ate and mai	ricing markups age markups to be available for selection at the Cost item pricing level.					Fennind	FC.MY	
st item p ate and mai nglish	ricing markups age markups to be available for selection at the Cost item pricing level • Markup name	Markup Percentage	Applied to section	Markup level ①	Auto display (j)	Español • Markup name	ES-MX	
st item p ate and man nglish	ricing markups nage markups to be available for selection at the Cost item pricing level • Markup name Enter markup name	Markup Percentage 0 00000	• Applied to section Select one •	Markup level ① Select one	Auto display ()	Español • Markup name Enter markup name	ES-MX	
st item p ate and man nglish	ricing markups nage markups to be available for selection at the Cost item pricing level	Markup Percentage 0.00000 11.0000%	Applied to section Select one Grand Total	Markup level ① Select one v Level 0	Auto display ()	Español - Markup name Driter markup nume MarkupGTLev1	ES-MX	
st item p ate and man nglish (+)	ricing markups aage markups to be available for selection at the Cost item pricing level.	Markup Percentage 0.00000 11.000016 0.000005	Applied to section Select one Crand Total Grand Total	Markup level () Selectione • Level 0 Level 4	Auto display () O O O O O	Español • Markup name Enter markup name MarkupGTLev1 markupgttest1	ES-MX © ©	
st item p ate and main splish	ricing markups aage markups to be available for selection at the Cost item pricing level.	Markup Percentage 0.00000 11.00000% 0.00000% 8.00000%	Applied to section Select one Grand Total Grand Total	Markup level () Select one • Level 0 Level 4 Level 4	Auto display () O O O O O O O	Español • Markup name Enter markup name MarkupOTLev1 markupgttest1 markup 2	ES-MX © © © ©	

2.24 ALLOWANCE CATEGORY

Projects need a way to track issues or change orders against project specific allowances defined within Prime (client contracts). Allowance categories and values are customizable within each project settings by manual entry. This customization has specific permissions around edits. Issues can select a category if it applies for tracking purposes. This provides a project's ability to customize based on Prime Contract and provide assistance in forecasting. If the WBS has costs appear in the OB or CB total cost associated within InEight Control, it automatically populates. The values are for reference or comparison purposes only.

sh					Control bu	iget data		Español	ES-MX
	Position	* Allowance category name	Allowance category value	WBS	0	OB total cost	CB total cost	* Allowance category name	
Ð	04	Enter allowance category name	Enter value of allowance category	Type WBS ID/Description				Enter allowance category name	
0	01	Warranty						ES_Warranty_ES	8
	02	Allowance						ES_Allowance_ES	8
	03	Contingency						ES_Contingency_ES	8

Setting the categories is done under the Project settings > Change > Configurations > **Allowance Category** tab. The settings default to Warranty, Allowance and Contingency. These categories are editable.

Additional categories can be added by typing in the name of the allowance and value, then select Add.

The categories show in the drop-down list under Change > Issue Log > Details > **Allowance category** to be tagged against. These categories are meant to track values which dollars need to be tracked against. If a WBS was associated from the Allowance category, its number appears in the WBS window. Selecting the eye icon opens an additional information window about that WBS.

Source/cause	Change condition
None 🗸	None 👻
Hint: Select what prompted the source/cause	Hint: Select the condition of the change
)cope	Assigned to
None 👻	
	Hint: Type employee name
Allowance category (j)	WBS 💿
WBS allowance 👻	X 58 X 17

2.25 DEPENDENT COST ITEMS

The Dependent cost items Configurations section (Project settings > Change > Configurations > **Dependent cost items**) is used to bring dependent cost item values into cost item pricing.

You can configure a predefined set of dependent cost items, so you can select specific markups from a list set.

English					Español	ES-MX
	Dependent cost item name	Cost percentage	• WBS	Applied to section	Dependent cost item name	
		Enter percentage	Type WBS ID/Description	Select one +		
	Insurance for labor	2.00%	4143-COVID #2: Staff Labor	Labor	Insurance for labor	8

Field	Description
Dependent cost item name	The name of the dependent cost item that will show in cost item pricing.

Field	Description
Cost percentage	The percentage to be multiplied by all items in the cost item pricing section to calculate the value of the dependent cost item.
WBS	The WBS code for the dependent cost item.
Applied to section	The section that the dependent cost item applies to, which includes Labor, Equipment, Materials, Small tools & supplies, Self-perform subtotal, Vendor Subtotal, Time related overhead, and Grand total.

2.26 DECIMAL PRECISION

You can use the Decimal precision configuration to set the number of digits that follow a decimal point. The precision decimals are used in issue, potential change order, and client change order logs, detail pages; and pricing. Exports for the logs also support decimal precision.

NOTE Tag output uses two decimal places.

You can set decimal precision on the Decimal precision configuration page (Project settings > Change > Configurations > **Decimal precision**). You can choose separate decimal precision for values, quantities, and percentages.

Configurations > Edit of	configuration list
	Decimal precision
	These settings control only values which are displayed and entered.
	Calculated values will show as rounded to the decimal precision below.
	How many digits should be displayed after the decimal? (Standard rounding applied)
	Velue
	value
	3
	Quantities
	3
	Percentages
	3

You can choose 0-11 digits. If you choose 11 digits, the decimal characters do not fit in the fields of the issue, PCO and CCO headers, and an ellipsis is shown. If you do not enter a value, Change uses a default value of 2.

2.27 MESSAGE CONFIGURATION

Your organization has set defaults for scope status in the organization level settings. This helps drive business behavior or requiring messages for status charges. At the Project level settings, access from Project settings > Change > Configuration > **Message configurations**. From the Configuration list you can toggle on/off the display message, as well as allowing notes. The explanation icon depicts this line item is set at the organization level.

Configuration list	Display confirmation message	Require notes	
Allowance category	\bigcirc	\bigcirc	í
Ball in court	Θ	Θ	
Change condition	\bigcirc	Θ	
General status - Issue		\bigcirc	
General status - Potential change order		Θ	
General status - Client change order		$\overline{\Theta}$	

2.28 RESPONSIBLE PARTY

Your organization can establish a default responsible party list in the organization settings. The project inherits the organization list and may mark some as inactive or create additional responsible party options.

To customize responsible party at a project level, go to Project settings > Change > Configurations.

A Responsib	e party	e are established at the organizational level and cannot be deleted. Additional Respons	ble party names may be added if needed.				
experience on monitorial man or concerce in the measurement party and committee on and the negotistate party need for an assigned issues Provision of a							
	Position	* Responsible party name	* Active				
\oplus	38	Enter Responsible party name	\odot				
	01	Client	\odot				
	02	Contractor	\odot				
	03	Designer	\bigcirc				
	04	Sub/Vendor	\odot				

The organization list defaults to active. To deactivate, change the toggle in the Action column from the check mark to the minus sign, and then save. Only those responsible party options with an active control are available to select in the issue, PCO, and CCO logs Responsible Party drop-down menus.

2.29 CONSTRUCTION AREA

In Change, for projects that started prior to Release 22.10, there is a drop-down list to reference Construction Areas to project changes you are tracking. In the Construction Area of Configurations (Project settings > Change > Configurations > **Construction area**), you can indicate where the dropdown list of Construction Area comes from.

On the Construction area section of this page, you can switch the toggle to select the source of the Construction Area attributes.

Со	nstruction Area						
Use t	he Construction area list created within Pla	an and it's maintained updated lis	st?	Θ			
Manu	ally enter the construction areas that will l	be available for this project.					
Con	struction Area						
4	Enter ID Enter description						
	Position	ID		Description			
	1	Area 17		AB down	×		
	2	Area 2		Administration	\otimes	1	
	3	Area 18		Superstructure	\otimes	L	

When the toggle is set to *Yes*, construction work area information configured in the InEight Platform Construction Work area (project > Project values > **Area**) populates the Construction area drop-down list in the Field information section of the Additional details in an issue.

When the toggle is set to *No*, you can enter construction area values, and those values populate the Construction area drop-down list. The Construction Area attributes are used in Change.

Construction area configuration in Change is not an option for projects that started with release 22.10 or later, the only way to customize Construction area information is in the Platform Construction area configuration.

2.30 CUSTOM LISTS

Custom lists let you create fields with drop-down lists. Values configured for the custom lists automatically populate project drop-down lists in the specified order. To configure a custom list go to

Project settings > Configurations > Custom Lists, and then select the custom list.

Custom list	Custom list	details						
Issue custom list 1 Issue custom list 2		Items established I Upon save, all mos	here will be available for difications will be reflecte	selection within the 'Custom list 1' dropdown at the CCO level. ed in the 'Custom list 1' dropdown menu.				
PCO custom list 1		English				Español	ES-MX	•
PCO custom list 2			Position	* Description	Active ①	* Description		t t
CCO custom list 1			04	Enter description	0	Enter description		i.
CCO custom list 2			01	me 1	0	me 1	8	•
			02	mc 2	0	mc 2	⊗	
			03	mc 3	0	mc 3	⊗	
								¥.

You can create two custom lists each for issues, PCOs, and CCOs. For each list item, you can add the list position and the description. When a list item is no longer needed for your project, you can switch the Active toggle to Off.

The custom lists are available in the Column options on the issue, PCO, and CCO logs, and you can change the values directly from the log. The fields are not available on the Details pages.

You can use custom labels (Project > Settings > Change > **Custom Labels**) to customize the names of the fields and lists.

2.31 ESIGN SETUP

The eSign setup tab (Project settings > Change > Configurations > eSign Setup) lets you add the names of up to 10 recipients, along with their companies, titles, and email addresses, that can be used with every contract in the project.

>		PROJECT DETAILS NO	TIFICATIONS WORKFLOW CONFIGURATIONS CHANGE TEM	IPLATES CHANGE CUSTOM LABELS	
			Project level templates Organization level templates DocuSign se	tup	
		Recipients established here are automat	cally available on all Potential CO's and Client CO's within this project. Changes	will be applicable to new Potential CO's and Client CO's only.	
•	Recipient	Name	Company	Title	Email
Ø	DocuSign 1	Type name of contact	Type name of company	Type title of contact	Type email address of c
8	DocuSign 2	Type name of contact	Type name of company	Type title of contact	Type email address of c
٥	DocuSign 3	Type name of contact	Type name of company	Type title of contact	Type email address of c
3	DocuSign 4	Type name of contact	Type name of company	Type title of contact	Type email address of c
a)	DocuSign 5	Type name of contact	Type name of company	Type title of contact	Type email address of c
	DocuSign 6	Type name of contact	Type name of company	Type title of contact	Type email address of c
	DocuSign 7	Type name of contact	Type name of company	Type title of contact	Type email address of c
	DocuSign 8	Type name of contact	Type name of company	Type title of contact	Type email address of c
	DocuSign 9	Type name of contact	Type name of company	Type title of contact	Type email address of c
	DocuSign 10	Type name of contact	Type name of company	Type title of contact	Type email address of c

Each eSign recipient field in this list has a corresponding template tag. You can add the tag to templates to require the signee's signature. The tags are read when sending the document for signature. You can also add recipients to a document when you send the document for eSignature. See
5.8 Change writer on page 219 for information about sending documents for signature. See 2.1 Organization settings on page 18 for information about using tags in templates.

If you edit the eSign setup, the recipients are available for new change documents only. You can override the eSign recipients in the eSign section of the PCO or CCO details.

2.32 CHANGE TEMPLATES

Change writer templates added at an organization level are available for projects by default. At the project level, you may deactivate a template if the template does not suit the needs of the project.

To deactivate a template, go to the project settings, then select Change > Change Templates > **Organization level templates**. Use the Project level use column to change the minus to the check mark.

Only templates that have the Project level use switch set to On appear in the Project level template list and be available for selection when generating a Change document from a template.

Templates may also be added directly at a project level. You can also set up the recipients for eSignature via DocuSign.

	PROJECT DETAILS	NOTIFICATIONS	WORKFLOW CUS	STOM LISTS CHANGE	ETEMPLATES	
		Project level templa	ates Organization level t	emplates		
			Ca	ancel Save	Clear all filters	P Q
\wedge	Select which Organization	on level templates to be	available for use at the p	project level from the 'Pr	oject level use' column.	
Project level use	Template	Description	Status	Template file	Created date	Created by
\bigcirc	sasfdsf	dsfdsf	Published	Change Sample Templ	06/17/2019	venkatesha km
\bigcirc	Temp_1	Temp_1	Published	Doc2.docx	06/17/2019	asad fathima
\bigcirc	asds	sadsa	Published	Change Sample Templ	06/17/2019	venkatesha km
\bigcirc	abcd123	abcd123	Published	Change Sample Templ	06/19/2019	Sathya Jayaraj
\bigcirc	ааа	aaa	Published	Change Sample Templ	06/19/2019	Sathya Jayaraj

2.33 DOCUSIGN SETUP

If your project is integrated with DocuSign for eSignatures, you can embed common signees into your project templates. See <u>eSign setup</u> for information about setting up eSign.

2.33.1 DOCUSIGN ADVANCED OPTIONS

Change supports the use of DocuSigns Advanced Options. The DocuSign Advanced Options are configured in DocuSign. These options let you customize the DocuSign experience. Your DocuSign administrator can set up the following options in DocuSign:

- Branding options let you select a logo and brand colors that were set up by the DocuSign administrator, for the envelope.
- Reminders options let you specify whether DocuSign sends reminders to signees, when to start sending them, and how often to send them.
- Expiration options let you set the number of days until the envelope expires and how often to send alerts. After the envelope is expired, recipients can no longer view or sign the documents in the envelope.
- Comments options let senders and recipients to enter comments on documents in the envelope.
- Recipient privilege lets you give recipients options for how they sign the document, such as signing on paper, assigning delegates, and editing documents.

2.34 CHANGE CUSTOM LABELS

To view the default values of custom labels set at the organization level, select the **Change Custom Labels** tab. You can use the read-only view as a reference, so you can see where tag information is mapped in a change order. The **Enable custom labels** toggle lets you specify whether to use the organization custom labels at the project level. When the toggle is set to On, the custom labels in the view are used in tabs, fields, tags, and widgets throughout Change. When the toggle is set to Off, Change uses the default labels.

General	PROJEC	DETAILS NOTIFICATIONS WORKFLOW	CONFIGURATIONS CHANGE TEMPLATES	CHANGE CUSTOM		
(19) Canital					Enable custom labels	⊖ 〒 Clear all filters (i) Q
	Field name	Custom label - EN	Custom label - ES-MX	Custom label - FR-CA	Custom label - PT-BR	Custom label - NL
Control	CCO	english CCO	Spanish CCD	French CCO	Portuguese CCO	Dutch CCD
Plan	CCOs	english ccos	CCOs	CCOs	CCOs	CCOs
Progress	Change order	english change order	Change order	Change order	Portuguese Change order	Dutch Change order
Compliance	Change orders	english change orders	Change orders	Change orders	Change orders	Change orders
(ip) Contract	Client	english client	Client	Client	Client	Client
Change	Client change order	english client change order	Client change order	French Client change order	Portuguese Client change order	Dutch Client change order
Design	Client change orders	english client change orders	Client change orders	Client change orders	Client change orders	Client change orders
(1) produ	Client CO	english client CO	Client CO	French Client CO	Portuguese Client CO	Dutch Client CO
	Client COs	english client cos	Client COs	Client COs	Client COs	Client COs
	Clients	english clients	Clients	Clients	Clients	Clients
	C0					
	COs	english cos	COs	COs	COs	COs
	PCO	english pco	PCO	French PC0111111111111111111111111111111111111	Portuguese PC0111111111111111111111111111111111111	Dutch PC0111111111111111111111111111111111111
	PC0s	english pcos	PCOs	PCOs	PCOs	PCOs
	Potential change order	english potential change order	Potential change order	French Potential change order	Portuguese Potential change order	Dutch Potential change order
	Potential change orders	english potentail change orders	Potential change orders	Potential change orders	Potential change orders	Potential change orders
	Potential CO	Potential CD	Potential CO	French Potential CO	Portuguese Potential CO	Dutch Potential CO
	Potential COs	Eng Potential Cos	Potential COs	Potential COs	Potential COs	Potential COs
	Vendor	english vendor	Vendor	French Vendor	Portuguese Vendor	Dutch Vendor
	Vendors	english vendors	Vendors	Vendors	Vendors	Vendors

2.35 PERMISSIONS

Permissions for each role are configured in Suite administration. Refer to the InEight Platform help topics for more information about roles and permissions.

2.35.1 SUPPORTING DOCUMENTS PERMISSIONS

If you want a role to be able to add, edit, or delete supporting documents, you must select the Add supporting documents, Edit supporting documents, and Delete supporting documents permissions nested under the Edit Change permissions. The check boxes for Add supporting documents and Edit supporting documents are enabled when the Edit Change permission is selected. The check box for the Delete supporting documents permission is enabled only when the Edit supporting documents permission is selected.

Snange	
□ Select all	
Change	Select all
Delete shared cost item template	
Execute/reopen change order	
$\Box \oplus$ Add supporting documents $\underline{\wedge}$	
🗌 🖻 Edit supporting documents 🔨	
Delete supporting documents	
Approve/Reject new issues	

CHAPTER 3 – GENERAL NAVIGATION

The following topics describe how to use the pages and registers in Change.

3.1 PAGE NAVIGATION

You can open Change using the link provided by your manager or facilitator. Open a web browser, and then click the link provided to open the InEight software.

Click the Main menu icon, and then select All projects & organizations.

E ŵ Welcome			View Contractor (Default)	● ♀ ♥ ₪ ▼ 2 ▼ 0
MB		∂ My links		
FAVORITES C S				
SETTINGS All projects & organizations		Add links	Addim	nage ר ל
Master data libraries > 84 Suite administration >				
© Profile > CONNECTED ANALYTICS			Dure Rive Print See CountrientRise combunity Time phased distribution	Ŷ
 Report Explore 				
INEIGHT ONLINE O Explore products	Add URL to d	Isplay		
 InEight learning and support > InEight com > 	(±)		You must select a project to view this data Please select a project	

Click your project Name link to open the project.

=	All projects & organiz	ations											Ø	• ↓ ⊗ (
PROJECTS							ORGANIZAT	IONS							
														0	Q
	ID †	Name	Stat_	Pha_	Organization	Created by		Created on	Forecast duration	Original contract	Contract number	Contract start date	Contract date	Contract complet.	- =
	105091	Steel Structure Training Job	Active	Execution	C-XYZ										
	105092	Steel Structure Training Job 2	Active	Execution	C-XYZ										
	105093	Steel Structure Training Job 3	Active	Execution	C-XYZ										
	105094	Steel Structure Partner Job	Active	Execution	C-XYZ										
	183850	Wards Island WWTP	Active	Execution	C-XYZ										

If your project is not shown, you can search by selecting the **Search** icon in the top right corner. This search function searches all terms in all columns.

Ta		i Q Search
	steel	Q

After you click the project Name link, the Projects home landing page opens.

<u>י</u> סו	∂ Links	ď	Control		② Quantity trac	king		
Add project image	Organization							
Minimum of 540рх x 350рх	Learn InEight		Manage budgets and forecasts		Build compor	nents and docur	nent quantities	s
	InEight University							
	Project							
-dodel -	Infinite Inversity			Launch				Launch
Jocument	in a generation of the second							
Johedule			Work packaging		Daily plannin	g		
Design						-		
Quantity forecasting			Group work into plane and packages		Accien tooko	for your orou		
Engineering			Group work into plans and packages		Assigntasks	for your crew		
luantify								
Juantity sources				Launch				Launch
2D takeoff								
Estimate 🛕								
Control	吗 Project notes	Ľ	© Contracts		Supporting d	ocuments		
Workspaces			Status	Count		Deinsted		
Project Ibrary			Cancelled	0		Nejected	C	
			Closed	0	U	U	U	
nan			Dratt Executed	3				
Juanuty tracking			In review	0				۲
work packaging			Out for internal signature	0				
Progress	R Sattinge		Out for vendor signature	0	Rid paskage			
Daily planning	- occurry		In approval	0	 Bid packages 			
Time center			Rejected	0	Status			Count
Weekly time sheet	Project and application settings				Awarded			0
Contract					In approval			
lid narkanes					Rejected			

From the Projects home landing page, you can launch Change in multiple ways:

• Click Change from the left menu

Add project image Minimum of 540px x 360px Steel Structure Training Job 105091
Control Vorkspaces Project library
Plan Quantity tracking Work packaging
Progress Daily planning Time center Weekly time sheet
© Contract Bid packages Contracts
Change Image: Compliance Image: Report

• Click the Main menu icon, and then click the project or organization. Select Change from the list.



• Select **Change** from the app launcher icon in the upper-right corner of the page.



3.1.1 CHANGE TOOLS AND NAVIGATION

Each register page in InEight Change contains menus and tools to help you navigate and perform key functions on the page.

Overview - Change Register Page Tools and Navigation

	Title	Description
1	Administrative tools	View your profile and notifications and sign out.
2	Tabs	Tabs you can click to access pertinent information.
3	Actions menu	Contains actions that can be performed from the register page, including viewing the import history, launching the reporting dashboard in InEight Explore, and generating a Change document.
4	Toolbar	Contains functions for the register page you are currently viewing, with specific editing options on the left, such as, add, edit, delete, and copy, and options that involve the entire page on the right, such as, search, import and export options, and contract information on the right.



3.1.1.1 CHANGE TOOLBAR

The options on this toolbar are different for approvers and non-approvers. The toolbar allows you to use functions for the register page displayed, with basic editing functions on the left and other functions on the right. The toolbar options will change depending on what page you are currently on.

Overview - Change Toolbar

	lcon	Function	Permissions
1	Add	Add a new issue to the register page.	Approver/

	lcon	Function	Permissions
			Non-Approver
2	Reject	After selecting an Issue Id, you can reject an Issue with the option of adding notes.	Approver
3	Approve	After selecting an Issue Id, you can approve an Issue with the option of adding notes.	Approver
4	Clear all filters	To clear all logs in the Change application and the change templates in the project settings.	Approver/ Non-Approver
5	View prime contract summary	The sigma icon displays is accessible throughout the application with details for Prime Contract such as current and projected contract value, contingency amounts and milestone dates.	Approver/ Non-Approver
6	Search	Search all columns for content by the keyword you enter.	Approver/ Non-Approver



3.1.2 CHANGE REGISTER TABS

The Change Register tabs will be visible based upon user access.

	Tab	Access	Definition
n/a	New Issue (when Workflow is turned off)	Viewer/Approver	An incident that happens during a project that could incur costs or impact the schedule. New Issue tab appears when Workflow is turned off.
1	Pending Issue	Viewer/Approver	Similar to the New Issues tab, except Pending Issues shows as a tab when workflow is turned on. All project users see the Pending Issue tab.

	Tab	Access	Definition
2	Issue Log	Viewer/Approver	Contains a register of all your issues, even if they are new issues or have become PCOs and CCOs during the process.
3	PCO Log	Viewer/Approver	A potential change to the owner's contract that you are pricing and getting ready to negotiate with the owner.
4	CCO Log	Viewer/Approver	A finalized change you are ready to send to the owner.
5	Action Items	Approver	If you are a designated workflow approver, you see this Change page that shows an additional tab called Action Items. The Approve and Reject buttons are enabled for approvers per the Change project settings under Workflow.
6	Audit Log	Viewer/Approver	Captures all changes made into issues, Potential Change Orders, and Client Change Orders.

105091 (Steel Training Job)		•	Change 🔻						
	PENDING ISSUES	2	ISSUE LOG	POTENTIAL CO LOG	CLIENT CO LOG	ACTION ITEMS	2	AUDIT LOG	CHANGE TEMPLATES
	1		2	3	4	5		6	7

3.2 COLUMN AND ROW MANAGEMENT

3.2.1 EXPAND COLUMNS

You can expand a column as needed to see the entire title of that column by using the same method that you would in Excel. If you hover over the column, you will see that your cursor changes from the arrow to the width selector.

Туре	Status	Approval st 🚽	ERP sy 😐	Vendor na	Current val
Material contract	Draft	Not appli		Merrill Iron &	\$0.00
Material contract	Draft	Not appli		Merrill Iron &	\$14,000.00
Subcontract	Executed	Not appli	Success	Gilbert Centr	\$50,000.00
Subcontract	Draft	Not appli		Merrill Iron &	\$150,000.00
Subcontract	Executed	Not appli	Success	Merrill Iron &	\$150,000.00
Subcontract	Executed	Not appli	Success	Kiewit Financ	\$200,000.00
Service agreement	Executed	Not appli	Success	Duvics Inc	\$250,000.00

3.2.2 MOVE COLUMNS

You can move a column from one place to another using drag and drop. If there are columns that you do not use, you can hide and unhide them from the view as needed.

3.2 STEP BY STEP 1 – MOVE COLUMNS

- 1. On the Change page, click on a column header, hold down the left mouse button and drag the column to the right. It appears raised with a shadow box.
 - Two black arrows will appear to guide you to the new column location

-	ļ.			Change iss	sue st	atus 🔻	Σ	i	Q
Schedule impact 👳	Issue	+ Scope	cope	Assigned to 👃		Supporting	documents		Note
-	New						+		

2. Drop the column header where you want to place the column.

3.2.3 SORT COLUMNS

You can sort any column by clicking once on the column header.

3.2 STEP BY STEP 2 – SORT COLUMNS

- 1. To sort a column, click on the column header.
 - A yellow up arrow appears on the column header indicating the column is sorted in ascending order

ID <mark>†</mark>	ф	
11289		
<u>11290</u>		
<u>11291</u>		
11292		
<u>11305</u>		
21358		
<u>21359</u>		
21360		
<u>21369</u>		

- 2. Click the column header again and the column will sort in descending order.
 - The yellow arrow on the column header will now point down

ID 📙	ſ	-
<u>21369</u>		
<u>21360</u>		
<u>21359</u>		
<u>21358</u>		
<u>11305</u>		
<u>11292</u>		
<u>11291</u>		
<u>11290</u>		
<u>11289</u>		

3. Click the column header again to remove the sort.

ID
<u>21369</u>
<u>21360</u>
<u>21359</u>
<u>21358</u>
<u>11305</u>
<u>11292</u>
<u>11291</u>
<u>11290</u>
<u>11289</u>

• The yellow arrow disappears

3.2 STEP BY STEP 3 – FILTER COLUMNS

1. From the Change page, click the inverted pyramid of the Type column header.

+					
	Issue ID	Issue name	-	Field contact	Created date
	1	Safety concern		bridgette quintero	06/06/2019
	2	PCO		bridgette quintero	06/06/2019
	<u>3</u>	Additional fabrication	L	addison balasbas	06/07/2019
_					

- Depending on if the column rows are from a validated list, or a free text description, you will get a drop-down list to filter the columns
- If the rows are from a free text, you will filter by selecting the required operator and entering a keyword
- If the rows are from a validated list, you will filter by selecting the appropriate check box
- The operators available for selection are: Contains, Is equal to, Is not equal to, Starts with, Does not contain, Is empty, Is not empty, Is not null, Is null, and Ends with
- 2. Click on the filter icon next to Issue Name, and a validated list appears.

Issue name	Field contact	Created date
<u>Safety concern</u>	Contains	06/2019
<u>PC0</u>	Contains	▲ 06/2019
Additional fabrication	Starts with	07/2019
Extra bolt assembly	ls equal to	07/2019
Rebar Couplers	ls not equal to Is empty	5/07/2019
Pipe fittings	ls not empty	5/12/2019
PT - Bearing Pads	ls not null	↓ ⁵ /12/2019
Bearings issue	paul trippi	06/13/2019
Plumbing piping	paul trippi	06/13/2019

3. Select Contains from the drop-down list, then click Filter and type in bolt.

Issue name	Field contact	Created date		
Safety concern	Contains	▼ 06/2019		
PCO	H	06/2019		
Additional fabrication		07/2019		
Extra bolt assembly	Clear	p7/2019		
Rebar Couplers	addison balasbas	06/07/2019		
Pipe fittings	paul trippi	06/12/2019		

- The Issue Name column is filtered to bolt, and the register only displays Issue names with that contain bolt.
- The filter pyramid icon displays yellow to indicate the column is filtered
- 4. To clear a filter, click the Filter pyramid icon and select Clear.

3.2.4 MANAGE ROW DENSITY

You can adjust the row density on the Issue log, PCO log, and CCO log. Click the **Row density** icon in the toolbar to select from Relaxed, Narrow, or Tight density.



Row density settings on a grid, such as the Pricing summary, are applied to any slide-out panels or dialog boxes accessed from that page.

This page intentionally left blank.

CHAPTER 4 – ISSUES

Change features let you create, manage, and price issues.

4.1 INEIGHT CHANGE WORKFLOW



4.2 ISSUE CREATION AND SETUP

4.2.1 ISSUE CREATION

The following steps walk you through creating a new issue in InEight Change.

4.2 STEP BY STEP 1 – CREATE A NEW ISSUE

You can create a new issue from the New Issue page or the Issue log.

- 1. From the New issue page or the issue log, click the **Add issue** icon. The Add new issue dialog box opens.
- 2. Enter the issue name and issue start date. You can also optionally enter a description of the issue.
- 3. You can do one of the following:
 - If workflow is not configured, click Add.
 - If workflow is configured, click **Submit for approval.**

If approval is not configured or if you are the first approver in the workflow, the issue is added to the New issue page and the Issue log with an issue ID assigned, and an issue status of New.

How the Issue ID, Issue status, and Issue approval status of a new issue are assigned depends on whether workflow is configured.

- When workflow is not configured, the issue is added to the New issue page and the Issue log with an issue ID assigned. The issue status is *New*, and the issue approval status is Not applicable.
- When workflow is configured and the person who created the issues is also the first approver in the workflow, the issue is automatically approved for the first step. The issue is added to the New issue page and the issue log with an issue ID assigned and an issue status of New. The issue approval status is Approved. When you hover over the issue approval status, it shows that it has been approved for the first step and is in step 2, if there is a step 2.
- When workflow is configured and the person who created the issue is not the first approver in the workflow, the first approver (either a person or a role) receives an email letting them know there is an issue to be approved. The issue is added to the New Issue page with an issue ID of Pending, an issue status of *New*, and an issue approval status of *In approval*. The issue is not added to the issue log until it has gone through all the approval steps.
- When an issue has been rejected in workflow, it shows in the New Issue log with the Issue ID *Rejected*, so they can be quickly identified. The rejected issue is disabled, so you can no longer see the issue. InEight recommends using the Comments section in the workflow to describe the issue and the reason it was rejected.

When the issue is in workflow, Change allows you to add supporting documents and edit fields that might help the reviewers in making approval decisions. To open the pending issue, click the **Pending** link in the Issue ID column of the New issue log. The Issue Details page opens, and you can then edit any field that is enabled. You can also go to the Supporting documents tab to add documents.

You can also import issues from a template. See 4.13 Issue Import on page 137 for information about importing issues.

Contract users can also add an issue from a VCO in Contract. If a new issue approval workflow is configured, the issue automatically goes to the New Issue log with an Issue ID of Pending. It does not get an issue ID until it is approved.

4.2.2 ISSUE HEADER

When you click on an issue's ID or name, the issue's record page opens. At the top of the page, a header section provides workflow and status information that you can update during the issue's lifecycle.

Current value	Cost	Billing markup	Markup	Markup %	Deductions	Net value	Issue status		Pricing status		Proposal status	
\$ 100,013.00000	\$100,013.00000	\$ 0.00000	\$ 0.00000	0.00000%	\$ 0.00000	\$ 100,013.000	New	•	None	•	None	

4.2.2.1 COST, MARKUP, AND MARKUP PERCENT PRICING BREAKDOWN

The Issue, PCO, and CCO shows the breakdowns of cost, billing markup, markup, markup percent, and deduction fields. This gives you the visibility into the profit you are making on an issue or change.

The Cost is the total of all priced items. The Billing markup is the markup based on the resource billing rates. The Markup is the total of all markups from the cost item, Pricing tab, PCO, and CCO. The Markup % is the markup divided by the cost. Deductions come from the cost item pricing tab and are subtracted from the current value. Current value is costs plus markups minus deductions.

4.2.2.2 STATUS INFORMATION

The status information lets you see issue status information at a glance. The statuses include the following:

- Issue status
- Pricing status
- Proposal status

4.2.2.3 ISSUE STATUS

The Issue Status drop-down menu is used to indicate the status of the issue. The following are examples of statuses you can assign. Your organization or project might have configured custom statuses.:

- In Review The issue is currently being reviewed.
- PCO The issue is now connected to a Potential Change Order.
- CCO The issue now converted to a Client Change Order.
- Parked The issue is no longer active but may be brought up again later. When selected, all fields within the issue become locked.
- Dropped The issue is no longer being considered. When selected, all fields within the issue become locked.
- Dispute The issue is under dispute.

• Closed - The issue is closed. You cannot split a closed issue or associate it to a Potential Change Order (PCO) or Client Change Order (CCO).

Changes made to Issue status will cause a window to appear where you can add notes related to the assignment you are making. Notes are not mandatory to save the change but canceling the window will cause the Issue status to revert to the previous state.

ß	•
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5	
	ar
	-

4.2.2.4 PRICING STATUS

You can select the Pricing status drop-down menu to classify where you are in the process of pricing the issue. Options include:

- Complete
- Not Started
- In Process
- Audit Review
- Complete



When changing the Pricing status, you are prompted to record notes just like you were when changing the other statuses.

4.2.2.5 PROPOSAL STATUS

Select the Proposal status drop-down menu to classify the proposal status of the issue. Options include:

- Not started
- In negotiation
- Submitted by sub
- Accepted by Contractor
- Submitted to client
- Accepted by client
- Rejected

_				
-	n negotiation		•	
N	ot Started			
In	negotiation			
St	ubmitted by su	b	15	Cano
A	ccepted by Cor	ntractor		=
St	ubmitted to cli	ent		
A	ccepted by clie	ent		
B	eiected			

When changing the Proposal status, you are prompted to record notes just like you were when changing the other statuses.

4.2.3 DELETE AN ISSUE

You can delete issues from the Issue log that were entered in error or are no longer valid. The issues must meet certain criteria based on their status, PCO or CCO association, and origin.

You can delete an issue if it meets the following criteria:

- The issue must have been created in Change or added via an API. Issues that originate from another InEight product, such as Plan, Progress, Compliance, Contract, or Document cannot be deleted.
- The issue must have a status of *New*, *Parked*, *Dropped*, or a custom status.

- The issue cannot be associated with a PCO, CCO, or budget move.
- The issue cannot be a main issue.

If you delete the issue with the highest number, the next issue created will take that number. If you delete an issue with a number in the middle of the list, that number is not used again.

To delete issues, select one or more issues from the Issue log, and then click the **Delete** icon. You must have the permission Delete issues.

4.3 DETAILS TAB

Below the header on the issue record, there are three tabs for capturing the issue's details, costs, and supporting documentation.

The Details tab is where you can record key information for understanding the nature of the issue and its potential impact. It is organized into the following sections:

- Issue details
- Issue description
- Additional details

4.3.0.1 ISSUE DETAILS

The issue details section includes fields that identify the issue.

Overview - Details Tab - Issue details

	Title	Description
1	Issue navigation	Lets you navigate to other issues without having to go back to the Issue log. Click the arrow to see a list of issues, and then select one. The selected issue opens in the same window.
2	Issue Name	 Free-text entry (will auto populate from initial entry screen) Contract will generate un-editable Issue ID separate from Issue name for internal tracking Required to create new issue
3	Issue Start Date	 Calendar drop-down Select start date of actual impact (will auto populate from initial entry screen) Required to create new issue

Overview - Details Tab - Issue details (continued)

	Title	Description
4	Description of change	Free-text entry and editor for description of issue (will auto populate from initial entry screen).

* Issue name				*Issue start date		
1				10/26/2021		Ê
				Hint: Date of the start of im	pact	
Format B	ΙÜ	≣ ₹	≣ ∷	目 値 値 2		

4.3.0.2 ISSUE DESCRIPTION

The Issue description section contains fields that help classify the issue.

Overview - Details Tab - Issue Description

	Title	Description
1	Source/Cause	Drop-down menu populated with general issue causes.
2	Change condition	Drop-down menu populated with general conditions of change.
3	Scope	Drop-down menu populated with scope identification of issue.
4	Allowance category	Category assigned to issue for tracking.
5	Assigned WBS	Validated WBS structure to associate a code with your issue. WBS codes include all terminal cost items from InEight Control. WBS codes can be assigned from InEight Plan or Control, or from this section. If the project is imported again from InEight Estimate after the WBS is

Overview - Details Tab - Issue Description (continued)

	Title	Description
		associated, you must manually update the issue with the new WBS code.
6	Push to cost item pricing	Automatically add the WBS codes to the cost item pricing for the issue.

•	None	-
		-
ct what prompted the source/cause of the Issue	Hint: Select the condition of the change	
3	Allowance category	(i)
•	None	•
WBS (1) 💿 👩		Push to cost item pricing
2 - Field Engineer validation2.2 🗙		<u>ـ</u>
2 - Field Engineer validation2.2 🗙		-

4.3 STEP BY STEP 1 – PUSH A WBS CODE TO COST ITEM PRICING

You can push the WBS codes you add to an issue directly to the cost item pricing for the issue, so you do not have to add them again when you configure cost item pricing.

This procedure adds the WBS codes to the cost item pricing. Any items that you add to the pricing are not pushed to the Details page. You can add them manually.

- 1. On the Issue Details page, enter the WBS codes you want to use for the issue in the Assigned WBS field.
- 2. Click **Push to cost item pricing**. The Push WBS to cost item pricing dialog box opens.

	Description	Ŧ	WBS phase code	 Cost pricing	~
	Field Engineer validation		1002 •	Select one	
	ST&S and Materials		1003 •	Select one	
	Grade Beams1		1006	Select one	
Items : 3					

3. Select the WBS codes you want to push to the cost item, and then click **Add**. The items are added to the pricing.

Items that are manually added on the Cost item pricing tab are not automatically added to the details. You must add them manually.

4.3.0.3 ADDITIONAL DETAILS

The Additional details section has expandable subsections for the following features:

- Control budget change
- Schedule impact
- Responsible parties
- Correspondence
- Request for information
- Tasks
- Weather
- Field information
- Design information
- Revenue category
- Custom fields

Click the arrow in the subsection heading to expand the subsection.

Overview - Details Tab - Control budget change

Title	Description
Control budget status	The status of the budget move in InEight Control. You can click the link in the field to go to the Control Workspaces page. When this field contains a value, the heading for this section shows the corresponding status icon from Control. See <u>Budget moves</u> for more information about initiating a budget move.
Control change register ID	The change register ID from Control. You can click the link in the field to go to the Control Workspaces page.

Control budget change 🛛 🧕		^
Control budget status	Control change register ID	
<u>Draft</u>	197.0	

Overview - Details Tab - Schedule Impact

	Title	Description
1	Has work started?	Yes/No drop-down menu.
2	Delay days	The number of delay days associated with the issue.
3	Does this impact the schedule?	Yes/No/TBD drop-down menu.
4	Schedule impact comments	 Free text entry to enter comments explaining how the issue will impact the schedule Only available if you select Yes for "Does this impact the schedule?"

Schedule impact		
Has work started?	Delay days	
Select	▼	
Does this impact the schedule?		
Select	•	
Schedule impact comments		50
		A

Overview - Details Tab - Responsible Parties

	Title	Description
1	Assigned to	Validated drop-down list of users assigned to current project.
2	Responsible party	The job title or role responsible for the issue.
3	Responsible party person	The person who is responsible for the issue. This is a free text field.

dditional details	
Schedule impact	~
Responsible parties	^
Assigned to 1	
Hint: Type employee name Responsible party	
Client	•
Hint: Select the responsible party person Responsible party person	
Hint: Type employee name	
Correspondence	~

Overview - Details Tab - Correspondence

	Title	Description
1	Have you verbally notified the client?	Yes/No drop-down menu.
2	Conversation summary	 Free text entry of summary of client verbal notification Only available if you select Yes for "Have you verbally notified the client?"
3	Date client notified	The date the client was notified. An information icon in the Date column shows the specific supporting document that must be attached to populate the date. You can add the document on the Supporting documents page. After a document is added, a link is shown in the File/Link column.
4	Date price to client	The date the price was communicated to the client. An information icon in the Date column shows the specific supporting document that must be attached to populate the date. You can add the document on the Supporting documents page. After a document is added, a link is shown in the File/Link column.

Schedule impact				~
Responsible parties				~
Correspondence				^
Have you verbally notified the Client?	1			
Select	-			
Conversation summary 2				500
				*
				~
Correspondence	Date		File/Link	
Date client notified		i		
		-		

Overview - Details Tab - Tasks

	Title	Description
1	Task count	The number of pending and overdue tasks for the issue.
2	Task title	The name of the task. The name is a link to the task in InEight Compliance.
3	Task person	The name of the person assigned to the task.
4	Due date	The date the task is due. Overdue tasks are highlighted in red.
5	State	The state of the task (scheduled, pending, overdue, complete). Pending tasks are highlighted in yellow; overdue tasks are highlighted in red;

▲ 🖾 🐵		DETAILS PRI	DOCUMENTS				Σ
							Cancel
Issue: 193 - details	Created by	- via Compliance	Change orders				
• Issue name	"Issue start date		Associate to Potential	change order			
mc testing again	11/11/2021		Associate to Client chi	ange order			
	Hint: Date of the start of impact		Additional date	ile			
Description of change			Additional deta	1115			
Format 🐱 B / 🖳 🖩			Schedule impact				~
second test with help from Esteban			Responsible parties				~
			Correspondence				~
			Request for informat	ion			~
Issue description			Tasks 🗿 🚺				^
			Task title	Task person	3 Due date	4 State	6
Source/cause	Change condition		dafa		12/13/2021	Pending	^
None	 None 	-	testing.story.11-30		12/05/2021	Complete	
Hint: Select what prompted the source/cause of the Isa	Hint: Select the condition of the change		Testing task 4		11/30/2021	Complete	
Scope	Allowance category	0	testing task 3		11/29/2021		
			Task overdue test		11/28/2021		

Overview - Details Tab - Weather

	Title	Description
1	Weather heading	Lets you see at a glance the first weather condition assigned in the issue.
2	Weather condition	You can select a weather condition from the drop-down list. An icon for the weather condition is shown in the Weather heading. You can select multiple weather conditions (for example, snow and wind), but only the first icon shows in the heading.
3	Create historical weather record	Lets you create a historical weather record for a seven-day period. The historical weather record uses the longitude and latitude from the project details to give a precise report of the weather conditions for the specified period. You can specify a start date that is up to one year before the current date. The end date can be up to seven days after the start date. The conditions include the temperature, weather condition, wind speed in meters per second and miles per hour, and precipitation. Change creates a PDF of the record and stores it in the Supporting documents tab for the issue.

Schedule impact	~
Responsible parties	v
Correspondence	v
Request for information	v
Tasks	~
Weather 😪 1	^
	3 Create historical weather record
Snow	9

4.3 STEP BY STEP 2 – CREATE A HISTORICAL WEATHER RECORD FOR AN ISSUE

You can create a historical weather record for a seven-day period within the last year.

If you choose a start date that is less than seven days from the current date, the report is for the period from the start date to the current date. You cannot choose a date that is older than a year from the current date.

- 1. From the Issue Details page, expand the Weather section in the Additional details.
- 2. Click Create historical weather record. A weather record dialog box opens.

Jpon clicking the Create	button, a supporting doo	cument will be created an	id added to the suppor	ting documents tab.		
Select up to 7 day date r	ange from past year to di	isplay hourly weather his	tory.			
UTC-06:00) Central Tim	e (US & Canada)					
Start date	Start time	End date	End time			
11/22/2021	12:30 AM	11/28/2021	11:30 PM	() Search	Reset parameters	н.,
Date	Time	Temperature	Weather condition	Wind () Precipitation (i)	
11/22/2021	1:00 AM	-1°C ,30°F.	overcast clouds	0 m/s, 0.00 mph		-
11/22/2021	2:00 AM	-1°C ,30°F.	broken clouds	0 m/s, 0.00 mph		
11/22/2021	3:00 AM	-1°C ,30°F.	overcast clouds	0 m/s, 0.00 mph		
11/22/2021	4:00 AM	-1°C ,30°F.	overcast clouds	0 m/s, 0.00 mph		
11/22/2021	5:00 AM	-1°C 30°F.	scattered clouds	0 m/s. 0.00 mph		•

- 3. Enter a start date and time and end date and time, and then click **Search**. Change calls a weather API and then returns hourly weather conditions for each hour.
- 4. Click **Create**. Change creates a PDF of the weather record and stores it in the Supporting documents tab for the issue.

Overview - Details Tab - Field Information

	Title	Description
1	Construction Area	The construction area associated with the issue. Select from a list of construction areas defined in InEight Platform from the drop-down menu. The Settings icon is a shortcut to the Construction areas configuration (project > Project values > Area), so you can configure a new construction area, if needed.
2	Field Contact	Validated drop-down list of users assigned to current project.
3	Daily Plan ID of impacted work	The daily plan ID associated with the issue. You can click the Add daily plan ID of impacted work button to add additional daily plan IDs. The daily plan ID is for reference only. You can click the Daily plan ID search icon to search for plan IDs in InEight Plan or InEight Progress. The Daily plan ID search lets you select operators, and the search returns plan IDs that meet the search criteria. Values selected from the search results are hyperlinked to the fields in Plan or Progress.

Overview - Details Tab - Field Information (continued)

	Title	Description
4	Latitude and	The latitude and longitude of the construction area associated with the
	Longitude	issue. These fields are for reference only.

dditional details		
Control budget change		~
Schedule impact		~
Responsible parties		~
Correspondence		~
Request for information		~
Tasks		~
Weather		~
Field information		^
Construction area	Field contact	
Select	▪ Hint: Type employee name	
Daily plan ID of impacted work	Q Daily plan ID search	
Hint: Enter *123* Add daily plan ID of impacted work		
Latitude	Longitude	
Overview - Details Tab - Design Information

	Title	Description
1	Plan/detail sheet number	Click the Add link to display a field to enter plan/detail sheets - optional entry field.
2	Specification section number	Click the Add link to display a field to enter specification section number(s) - optional entry field.
3	Components	Click the Add link to display a field to enter related components - optional entry field.

Additional details	
Schedule impact	~
Responsible parties	~
Correspondence	~
Request for information	~
Weather	~
Field information	~
Design information	^
Plan/detail sheet number • Add plan/detail sheet number Specification section number • Add specification section number Components • Add component	
Revenue category	~
Custom fields ()	~

Overview - Details Tab - Revenue category

	Title	Description
1	Revenue category	The revenue category for the issue. The revenue categories are defined in the organization master data. You can select the category from a drop-down list.

Overview - Details Tab - Revenue category (continued)

	Title	Description
2	Revenue change status	The change status of the revenue category. This field is read-only.
3	Probability percentage	The probability percentage based on the settings in the master data. This field is read-only.

edule impact Ionsible parties Ispondence Iest for information	~
est for information	~
est for information	~
est for information	
	~
her	~
information	~
gn information	~
nue category	^
nue category	
ne construction of the second s	•
nue change status	
ability percentage	
•	

4.3.0.4 REQUEST FOR INFORMATION

RFIs are often a result of an issue. You can manually add RFI documents from this section or from the Supporting Documents page. If you manually upload an RFI, only the Title and RFI No. columns are filled. The Status column is only filled when you add an RFI from InEight Document. The heading for the Request for Information section includes a counter so you can quickly see the number of associated RFIs the issue has.

NOTE

Current value \$ 1,210.00	Cost \$ 1,210.00	E cup % J%	Deductions \$ 0.00	Net value \$ 1,210.00	Issue status Executed v	Pricing status None	Proposal statu None	s v	
ins 🔻 🙏 🔃	G	DETAILS	PRICING D	JPPORTING DCUMENTS			Cancel	F Sav	(ve
KP12 Description of change		ä	Additional det	ails					
в І Ц		2	Control budget cha	ange			•		
		Schedule impact				•			
		Responsible partie	S			•			
			Correspondence				•		
Issue descrip	otion		Request for inform	ation			•		
Source/cause			New RFI document		Title	Status			
			From InEight Document	٢	There are no associated RFI's		*		
Scope None	()								
						*			
Assigned WBS (i) 💿		sh to cost item pricing	Tasks				•		
	(Weather				•		
Hint: Type WBS ID or WBS	S description		Field information						

To add an RFI document from this section, click the **Add Request for information** icon, and then select whether to add a new document or a document from InEight Document.

Although you can add an RFI to a PCO or CCO, the Request for information section only shows for issues.

4.4 REVIEW OR APPROVE AN ISSUE

If you are an approver in the approval workflow, you are notified by email when you have an issue to approve. If you are an approver in the first approval step, your issue is automatically approved, and the approval step is skipped.

4.4 STEP BY STEP 1 - REVIEW/APPROVE AN ISSUE

- 1. Navigate to the Steel Training Job > Change > Issue Log.
 - Since you are an approver, your issue is not queued for approval and is in a Review status.
 - Notice that an Issue ID has been assigned to the issue.
- 2. Click on the Issue ID for [your initials] Bearing Pads.

	105091 (Stee	el Training Job)	Ŧ	Change 🔻
			PENDING ISSUES	3 ISSUE LOG
+	հ է	jej		
	Issue ID 📒 👘	PCO ID	Client CO ID	Issue name
	<u>38</u>			PT-Bearing Pads
	<u>37</u>			PT - Bearing Pads
	<u>36 B</u>	PAT001	Client Chang	PAT - Bearing Pads (B)

- 3. As part of your review as an approver, go into the Issue and make a change to the Description.
 - Description: Add This is a high priority

Issue name	*Issue start date	
PT - Bearing Pads	06/26/2019	Ê
	Hint: Date of the start of impact	
escription		904

4. Select Save.

4.5 CHANGE TOOLBAR

Change has Project contract summary, supporting documents, and Notes icons available on every tab.



See <u>Supporting documents</u> for information about using the Supporting documents tool.

4.5.0.1 PROJECT CONTRACT SUMMARY

Click the Project contract summary icon to open a slide-out panel that has a breakdown of the totals.

	Title	Description
1	Current project value	The sum of the original project value and the Executed CCOs.
2	Projected project value	The projected project value is the sum of the current project value and the Non-executed CCOs. The Potential project value is the sum of the projected project value and the non-executed PCOs.
3	Milestones	Lists of contract and forecast dates for the project. The Forecast start date, Duration, and Completion date are entered on the Project details page. The Extension/Reductions, Revised duration, and Revised completion date are sent to the Project details page. Extension/Reductions are updated and populated from the CCO schedule impact dates upon execution of the CCO, and the revised completion date is updated accordingly. The Estimated float is the difference between the Forecasted revised completion date and the Contract revised completion date.
4	Allowance category	The totals of any issues associated with an allowance category on the Issue details page out of the total value that was assigned to that category in the project settings.

urrent project up				
Original project valu	ie (υ		\$0.00
	-			30.00
Executed CCUs				\$5,914,720.53
Current project value	•			\$5,914,720.53
rojected project v	alue	2)	
Non-executed CCOs		-		\$103,504.40
Projected project val	ue			\$6,018,224.93
Non-executed PCOs			(\$8 362 040 83)
Non-executed PCOs Potential project value tilestones Project dates Contract date Start date Duration (Calendar days) Completion date (1)	Je		(\$2,343,815.90)
	~			
lilestones Project dates	3		Contract	Forecast
Contract date			07/01/2021	10100001
Start date			07/01/2021	07/01/2021
Duration (Calendar d	lavs)		10	10
Completion date (1)			07/10/2021	07/10/2021
Extensions/Reductio	ns		6	5
Revised duration			16	15
Revised completion	date (07/16/2021	07/15/2021
Estimated float	-			1
llowance category	4)		
Actual	Po	tenti	al	Remaining
Warranty				
	\$0.00	of	\$0.00	
Block material	\$0.00	01	\$0.00	
\$20	0,000.00	of	\$1,600.00	
Contingency				
\$1	6,482.35	of	\$100,000.00	

4.5.1 ADD NOTES

To add notes to an issue, click the Add notes icon. The Notes slide-out panel opens, and you can view previous notes and add a new one.

	Σ 🗗
	Cancel Save
Notes for 469 : F3	×
	08/23/2021 2:41 PM
And the second second	
	08/23/2021 2:41 PM
Res To all age on the	
You 08/26/2021 8:02 PM	
Type message here	
	e
	Cancel

The supporting document notes are maintained as the issue moves up to a PCO and CCO.

When you add notes on the Supporting documents tab, the slide-out window has a tab that lets you add notes that are specific to the document. Notes added at other levels are also visible.

Actions -	• •				DETAILS	PRICING	SUPPORTING DOCUMENTS	WORKFLOW ASSIGNMENTS			\Xi Clear all filters 🛛 🖉	Q
											Start approval Reject App	prove
Trite		File/Link rfl.	Pocument type = Request for inform	Subtype 🤤 External docu	_ 🐺 External docu	L 😇 Document so External link	ur	Added by cpreeti cpreeti		Notes for 5555.2 : b3 (B) NOTES Supporting CocuMarts NotEs Supporting decomments note Ywe 60/05/3521 6223 PM Off of home vinet Note added at POO heret		×
										Yee 05/02/2021 03:26 FM extend of PCO feed		
												50
										Type message here		©
											Cancel	Add

When you approve or reject a document at the issue level, the notes you add for the approval or rejection are also visible at the PCO and CCO levels.

4.5.1.2 ALLOWANCE CATEGORY SUMMARY

When you open the Prime contract summary panel with the sum Σ icon button, an Allowance category section is at the bottom of the panel. This section shows all of your project's allowance categories and their calculated amounts. Color-coded bars show how much of each category's amount is actual, potential, or remaining. You can hover over each color in the key to see definitions. These amounts are defined as:

- Actual- Sum of closed and executed issues
- Potential- Sum of all issues except closed, dropped, and executed
- Remaining- Allowance value minus the sum of actual and potential

llowance cat	tegory			
Actual	e P	Remaining		
Warranty				
	\$250,000.00	of	\$200,000.00	
Allowance				
	\$25,000.00	of	\$100,000.00	
Contingency				

4.6 CURRENT VALUE

The Current value of an issue is displayed in the issue log as well as the far left of the issue header.

PENDING ISUE LOG POTENTIAL CO CLENT CO LOG ACTION AUDIT LOG CHANGE View: Unsaved (AII) <td< th=""><th></th><th>8</th><th>10509</th><th>I (Stee</th><th>el Training Job)</th><th></th><th>Change</th><th>•</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>?</th></td<>		8	10509	I (Stee	el Training Job)		Change	•								?
Image: Chance issue ID PCO ID Client CO ID Issue start date Issue start. Assigned to Ball in court Ball in court Mitten no. Date clien Value type Current value Image: Client CO ID Current value Image: Client CO ID <						PENDING ISSUES	3 ISSUE	LOG POTENTIA LOG LOG	L CO CLIENT	CO LOG	CTION 3 TEMS	AUDIT LOG	CHANGE TEMPLATES		View:	Unsaved (All)
Issue D POO D Client CO D Issue name Issue statt Issue statt Assigned to Ball in court Ball in co. Written no. Date clien. Value type Current value 4. 4. 1 6. 6./07/2019 New 1 1 1 ROM \$37,450.00 3.4 3.4 1		+	L,	4	<u>iei</u>									Change	issue status 🔻	Σ 🦻 (
Image:			Issue ID		PCO ID	Client CO ID 👳	Issue name 😑	Issue start date 👘	Issue stat 👳	Assigned to	Ball in court	Ball in co 😑	Written no 😑	Date clien 😑	Value type	Current value \downarrow 🛛 😇
Image: Second			<u>4</u>				Extra bolt as	05/30/2019	New				-14		ROM	\$37,450.00
5. Rebar Coupl 04/25/2019 New 39 ROM \$20,500.00 11. PT-Bearing 06/05/2019 New -10 Proposed \$7,000.00 Current value \$20,700.00			<u>34</u>				PT - Bearing	06/17/2019	In Review				-2		ROM	\$20,700.00
Image: Delay days due to issue Ball in court \$20,700.00 2			<u>5</u>				Rebar Coupl	04/25/2019	New				-39		ROM	\$20,500.00
Current value Delay days due to issue Ball in court \$20,700.00 3 Contractor			11				PT - Bearing	06/05/2019	New				-10		Proposed	\$7,000.00
	[Cu \$2	rrent 0,70	t va 0.0	alue)0			Delay d	lays due to) issue	2	Ball in co Contrac	urt tor			

The issue's Current Value updates automatically with the information entered in the Pricing fields. The value that the Current Value displays comes from the sum of the Self perform and Vendor subtotals, plus any lump sum adjustments, if any.

4.7 SUPPORTING DOCUMENTS

The Supporting Documents tab houses all the documentation for the issue in one location. This includes checklists, designs, diagrams, insurance, meeting notes, permits, proposals, etc. By housing this in one tab, all involved with the issue can verify all necessary documentation is gathered from the parties involved.

You add supporting documents by clicking the **Add** icon on the issue's Supporting Documents tab. You have the choice of adding a new supporting document or adding a document from InEight Document.

				DETAILS	F	PRICING & PROPOSAL	SUPPORTING DOCUMENTS
	New supporting document		Document type	Subtype		External document type	Document source
) sup	From InEight Document	<u>sument.co</u>	Draft change order				External link

When you choose **New supporting document**, in the resulting Add supporting documents window, you can add the appropriate documents as needed by filling out the Title and Document type in the Add supporting document dialog box, then browsing to your document file and attaching it. When the document is added from InEight Document, and the document type in Document matches a document type in the cloud platform, that value shows as the default document type. You can edit the document type as needed.

*Title	*De sum ant turns	
	-Document type	
	Select one	•
*File/Link		
	SELECT FILE	
Notes		200
Type message here		

When you add a supporting document type of Proposal and subtype From vendor, you can optionally select a contract from a list of all vendor contracts on the issue and then select from a list of all vendor change orders associated with the contract. This lets you specify the contract and vendor change order that is related to the supporting document and visibility to the contract associated with the proposal. The document is then visible in InEight Contract as read-only on the main Supporting document register and the contract's Supporting Document tab. If a VCO association to a contract is made, the supporting document also shows in the Contract or VCO supporting document page.

The action Contract takes depends on the action taken in Change:

 When you add a pricing item without a VCO ID to the Vendor section of the pricing summary and then add a supporting document with type Proposal and subtype from vendor, a new field, Vendor Change order ID is shown in the New supporting document dialog box. If you click Add without adding the VCO ID, the document is added to the contract's Supporting documents page and the main Supporting documents page in Contract. See 4.15 Pricing on page 145 for information about adding pricing items.

- When you create a new VCO from the pricing item, a vendor ID is associated to the pricing item.
 When you add a new supporting document Proposal from vendor, you can select the VCO ID.
 When you add the document, it is added to the VCO's Supporting documents page, the
 Contract's supporting documents page, and the main Supporting documents page in Contract.
- When no contract ID is entered, Change sends the proposal to Contract. The document shows in the Contract main Supporting document register until you add a contract ID in Change.

The document is read-only in Contract because it came from Change. If the documents are updated in Change, the changes will show in the document in Contract. For example, if you change title, Contract updates the title. If you change the document type or subtype, Contract deletes the document.

You can upload a saved supporting document to Document from Change, so you do not have to load it in Document, and then link it back in Change.

4.7 STEP BY STEP 1 – UPLOAD A DOCUMENT TO DOCUMENT

Upload a supporting document to Document when you want to take advantage of Document's organization and versioning features.

Only documents with the document source *My computer* can be uploaded.

- NOTE Single-sign on is available for Change to Document features, such as creating mail or a form. When you use one of these features, the Document sign-on page opens, and you can enter your credentials. This creates a sign-on token that lets you remain signed in until the session ends. The first time you sign in to Document, a black secondary window and the Document Home window also open. You can close these windows. Single sign-on is activated, and they are not shown again.
- 1. From the Supporting documents register, select a document with the document source *My computer*, and the click the **Upload** icon.



2. If you are not already signed into InEight Document, use your credentials to sign in to InEight Document.

In Eight® DOCUMENT Powered BY TeamBinder
User ID Company ID Password Remember Login User ID & Company ID
Fultiple Accounts? Login via Profile
Contact Support 1800 727 102 Bookmark This Page Terms of Use Privacy Statement Forgot your password?

A sign-in token is created that lets you remain signed in to Document until the session ends. If this is the first time you are signing in to Document from Change, a black secondary window and the Document Home window are shown. After you close these windows, single sign-on (SSO) to Document is activated, and they are not shown again.

The Upload window in the Documents module of Document opens with the document you selected in Change already attached.

- 3. If you want to add more documents, you can add them at this time.
- 4. Click **Save and Transmit**. The document is now saved in the Document Documents module.
- 5. Close the Document window. Change shows the Edit supporting document dialog box. The file link is replaced with the document link form Document.
- 6. Click **Save**. The Supporting documents register refreshes with the file link to the Documents module. The Document source is replaced with InEight Document, and the External document type and status are now populated.

4.7.1 SHOW SUPPORTING DOCUMENTS IN GENERATED DOCUMENTS

A toggle on the Supporting documents register, Show in generated document, lets you indicate whether the document is shown in a collection table based on the collection table type. When you have a supporting document that you do not want to show in a collection table in a generated document, set the toggle to *No*. When a document is generated, only the documents that were set to *Yes* are shown.

Curr	ent value		Cost	Billing markup	Marku	ip	Marg	in D	eductions	Net value	PC0 status	Pricing status	Proposal status
\$0.0	00		\$0.00	\$0.00	\$0.00		0.009	6 SI	0.00	\$0.00	New	 None 	None
Actic	ons 🕶 (• C	⊗ _ ⊳				DETAIL	S PRICING	SUPPORTING DOCUMENTS	WORKFLOW ASSIGNMENTS			Ξ Clear all filt Σ 🖷
													oval Reject Approve
	Title	Ŧ	Document type 👘	External document ty	External document st	Document source		Added on	Original Issue	Executed Change ord	DocuSign status 👳	Approval status	Show in generated document
			Certification			My computer		07/22/2022	192-Internal demo		Not applicable	Not applicable	0
			Draft change order			My computer		07/22/2022			Not applicable	Not applicable	0
0	-		Draft change order			My computer		07/22/2022			Not applicable	Not applicable	0
			Draft change order			My computer		07/22/2022			Not applicable	Not applicable	0
0			Draft change order			My computer		07/22/2022			Signed	Not applicable	0
0	-		Draft change order			My computer		07/22/2022			Not applicable	Not applicable	0
	-		Draft change order			My computer		07/22/2022			Not applicable	Not applicable	0
			Certification			My computer		07/22/2022	192-Internal demo		Not applicable	Not applicable	0
0			Checklist			My computer		07/22/2022	192-Internal demo		Not applicable	Not applicable	0
	and the second second		Draft change order			My computer		07/22/2022			Completed	Not applicable	0

A document that is available at more than one level, such as an issue-level document available on the issue, PCO, and CCO Supporting documents pages, can have a different setting at different levels. For example, you might set the toggle at the issue level to *Yes* to show in a generated document. You could set the toggle at the PCO level for the same document to *No* to not show in a PCO document. Change uses the setting that corresponds to the level of the collection table tags in the template. Using the previous example, Change shows the supporting document in a collection table as follows:

- When you generate a document for an issue, the document is shown because the only collection table type in an issue document is an issue table.
- When you generate a document for a PCO that has an issue-level collection table, the document is shown because it is part of an issue-level collection table.
- When you generate a document for a PCO that has a PCO-level collection table, the document is not shown, because the document is suppressed at the PCO collection table level.

4.8 VIEW A SUPPORTING DOCUMENT

To view a supporting document, click the link in the File/Link column of the Supporting documents register. The document opens a preview in a new tab, so you can view the pages of the document and then decide if you want to download it to your workstation. You can use the **Previous** and **Next** buttons to view all pages.

HistoricalWeatherRecord_2023-April-05 Previous Page No. 1 / 1 Next Historical Weather Record Omaha, Nebraska, 68114, United States Of America, Lat. 41,2656 , Lon96 0493 (UTC-06 00) Central Time (US & Canada) Selected Range: Date: Time: Date: Time: From: 04,05/2023 12,30 AM To: 04,065/2023 11,30 PM	
Historical Weather Record Omaha, Nebraska, 68114, United States Of America, Lat. 41.2856, Lon98.0493. (UTC-08.00) Central Time (US & Canada) Selected Range: Date: Time: Date: Time: From: 04.05/2023 12.30 AM To: 04.05/2023 11.30 PM	
Historical Weather Record Omaha, Nebraska, 68114, United States Of America, Lat. 41.2656 , Lon96.0493 (UTC-06.00) Central Time (US & Canada) Selected Range: Date: Time: Date: Time: From: 04.05/2023 12.30 AM To: 04.05/2023 11.30 PM	
Historical Weather Record Omaha, Nebraska, 68114, United States Of America, Lat. 41.2656 , Lon96.0493 (UTC-06.00) Central Time (US & Canada) Selected Range: Date: Time: Date: Time: From: 04/05/2023 12.30 AM Te: 04/05/2023 11.30 PM	
Historical Weather Record Omaha, Nebraska, 68114, United States Of America, Lat. 41.2656 , Lon96.0493 (UTC-06.00) Central Time (US & Canada) Selected Range: Date: Time: Date: Time: From: 04/05/2023 12:30 AM Te: 04/05/2023 11:30 PM	
Historical Weather Record Omaha, Nebraska, 68114, United States Of America, Lat. 41.2656 , Lon96.0493 (UTC-06.00) Central Time (US & Canada) Selected Range: Date: Time: Date: Time: From: 04/05/2023 12:30 AM Te: 04/05/2023 11:30 PM	
Omaha, Nebraska, 68114, United States Of America, Lat. 41.2656, Lon96.0493 (UTC-06.00) Central Time (US & Canada) Selected Range: Date: Time: Date: Time: From: 04/05/2023 12:30 AM To: 04/05/2023 11:30 PM	
(UTC-06.00) Central Time (US & Canada) Selected Range: Date: Time: Date: Time: From: 04/05/2023 12:30 AM To: 04/05/2023 11:30 PM	
Selected Range: Date: Time: Date: Time: From: 04/05/2023 12:30 AM To: 04/05/2023 11:30 PM	
From: 04/05/2023 12:30 AM To: 04/05/2023 11:30 PM	
Date Time Temperature Weather condition Wind Precipitation	
04/05/2023 12:30 AM 20°C (-57°F clear sky 0 m/s, 0 00 mph	
04/05/2023 01:30 AM 22°C ,71°F. clear sky 3.6 m/s, 8.00 mph	
04/05/2023 02:30 AM 22*C,72*F. clear sky 6.17 m/s,14.00 mph	
04/05/2023 03:30 AM 20°C (58°F. clear sky 8:75 m/s, 20.00 mph	
04/05/2023 04:30 AM 14*C ,58*F. clear sky 11.32 m/s, 25.00 mph	
04/05/2023 05:30 AM 11*C,51*F. clear sky 9:26 m/s, 21.00 mph	
04/05/2023 06:30 AM 7*C ,44*F. scattered clouds 12.86 m/s, 29:00 mph	
04/05/2023 07:30 AM 5°C ,41°F. broken clouds 10.29 m/s, 23.00 mph	
04/05/2023 08:30 AM 4*C ,39*F. overcast clouds 8:23 m/s, 18:00 mph	
04/05/2023 09:30 AM 3°C 38°F. overcast clouds 10.29 m/s, 23:00 mph	
04/05/2023 10.30 AM 3°C 37°F overcast clouds 11.83 m/s, 26.00 mph	
04/05/2023 11:30 AM 2*C ,35*F. broken clouds 10.8 m/s, 24.00 mph	
04/05/2023 12:30 PM 2°C,35°F. overcast clouds 8.75 m/s, 20.00 mph	
04/05/2023 01:30 PM 1*C ,34*F. broken clouds 9:77 m/s, 22:00 mph	
Close Download file	

To download the document to your workstation, click **Download file**.

4.9 CREATE AN RFI FORM IN INEIGHT DOCUMENT

You can create an RFI form in the InEight Document Mail module from an issue. Document saves the form and creates a link in the Change Supporting documents tab.

4.9 STEP BY STEP 1 – CREATE AN RFI FORM IN INEIGHT DOCUMENT.

- NOTE Single-sign on is available for Change to Document features, such as creating mail or a form. When you use one of these features, the Document sign-on page opens, and you can enter your credentials. This creates a sign-on token that lets you remain signed in until the session ends. The first time you sign in to Document, a black secondary window and the Document Home window also open. You can close these windows. Single sign-on is activated, and they are not shown again.
- In the Supporting Documents tab of an issue, expand the Actions drop-down menu, and then select Create document > Form.

2. Select Request for Information in the pop-up window.



• The Create new form window will open showing available forms

Create new form	
*Select form	
Select one	th.
Select one	0
Client Request For Information	100000000000000000000000000000000000000
Engineering Change Notification	
Material Change Request	

3. If you are not already signed in to InEight Document, use your login credentials to sign in.

DOCUMENT POWERED BY TeamBinder
User ID Company ID Password
Multiple Accounts? Login via Profile
Contact Support 1800 727 102 Bookmark This Page Terms of Use Privacy Statement Forgot your password?

A sign-in token is created that lets you remain signed in to Document until the session ends. If this is the first time you are signing in to Document from Change, a black secondary window and the Document home window are shown. After you close these windows, single sign-on (SSO) to Document is activated, and they are not shown again.

4. After the New Request for information window opens, complete the form.

VENTEST2 - New Request For Information - Google Chrome	O Sharing Desktop ·	Stop Sharing	-		
kiewittest.teambinder.com/InEight1911v8/Forms/tbFormDetailView.aspx?FormIntKey=08tAction=NB					
Request For Information Need Help? V					
Save Complete Action Print Close More Configure Workflow Select Reviewers				Status Outstanding	٠
Details Links Comments History					
RFI	No:				i i
For Action					÷
For Info					÷
Subject*:					
Message:					
-					
Discipline : Select a Discipline • Area : Select an Area • Loc Proposed Solution:	ation : - Select a Location	•			

5. When completed, select the users for distribution of your form.

Workflow Dis	tribution	
Distribution*:	Select Workflow Distribution	*
	Select Workflow Distribution	*
	Chad Test	
	Contract	
	Matt / Aaron	
	QA Team	
	UAT TEST	-

• A Notification of success appears.

Team	Binder
	Form saved successfully.
0	Please note, this action will save the Form as Draft only. For Action and For Info Users will not be notified. You will need to use Complete Action to issue the form to the recipients.
	OK

- This allows you to go into Document from Change and grab a pre-defined form, fill out the information, save, and complete.
- In the Add Supporting documents window, a link to the form you just completed, appears.

"Title		*File/Link	
test		NEWLICE INCOMMENT	
Document type			
Request for informati			
Notes	D ₂		186
3178-800-Forms			

• Under the Request for information window, this form now appears with a status of **Outstanding**.

• You access this file in Document by selecting its title.

Request for information

RFI No.	Title	Status	
KIEWITTEST-RF	test	OUTSTANDING	*
		63	Ŧ

NOTE

If Create document > **Form** is inactive, you can select the cogwheel ^{CP} icon to set up integration with InEight Document.

You are then taken to InEight Document's Forms module to fill out the form. If you save and complete the workflow, the new RFI populates the Request for information box in the Details tab of the issue.

You can see issues with attached RFIs in the References column of the Issues log register. If there is an RFI associated with the issue, the column shows the number of associated RFIs. Click on the link in a cell for more information about the RFIs and links to the files.

4.10 CREATE MAIL IN INEIGHT DOCUMENT

You can create mail in the InEight Document Mail module from an issue. Document saves the mail and creates a link in the Change Supporting documents tab.

4.10 STEP BY STEP 1 - CREATE MAIL

NOTE Single-sign on is available for Change to Document features, such as creating mail or a form. When you use one of these features, the Document sign-on page opens, and you can enter your credentials. This creates a sign-on token that lets you remain signed in until the session ends. The first time you sign in to Document, a black secondary window and the Document Home window also open. You can close these windows. Single sign-on is activated, and they are not shown again.

- 1. From the Details page go to Actions > Create document > Mail.
- 2. If you are not already signed into InEight Document, use your login credentials to sign into InEight Document.

DOCUMENT POWERED BY TeamBinder
User ID Company ID Password Remember Login User ID & Company ID
Multiple Accounts? Login via Profile
Contact Support 1800 727 102 Bookmark This Page Terms of Use Privacy Statement Forgot your password?

A sign-in token is created that lets you remain signed in to Document until the session ends. If this is the first time you are signing in to Document from Change, a black secondary window and the Document Home window are shown. After you close these windows, single sign-on (SSO) to Document is activated, and they are not shown again.

3. The Create Document Mail dialog box opens. Select the mail type from the list defined in Document that are specific to the project's mail type, and then click **Next**.

orcate bootament Mail				
1 Select Mail type 2 Attach supporti (Optional)				
Select the Mail type to be created. Upon clicking the	e 'Create' button, you will be ta	aken to InEight Docum	ent to create the mail.	
*Mail type				
1		•		
Change Order		A		
Change Order Response				
Formal Letter				
General Correspondence				
IDF Response				
Issue Documentation Form		•		

- 4. Optionally add an attachment. If documents were previously selected on the Supporting documents page, they are already selected in the dialog box.
 - To add an attachment from the Supporting documents tab, click Next. The Select documents dialog box opens. You can choose documents from the Supporting documents tab with the Document source *My computer*. After you attach the documents, click **Create**. The Mail module opens in Document with your attachments included.
 - To add an attachment in Document, click Create. The Mail module opens in Document. Click Attach files > Attach Documents, where you can search for the document. After you select a document, click Save.
 - To send mail without an attachment, click Create. The Mail module in Document opens.
- 5. Enter information in the To and Subject fields. The other fields on the page are optional. Enter or update the fields as needed for the mail message, and then click Send. A summary page opens.
- 6. Edit links and notes, if needed. The mail is added in Document.
- 7. Close the Document window. You are then prompted to add the mail as a supporting document in Change. The document type defaults to Correspondence but can be changed.
- 8. Click Save to save the mail to the Supporting documents page.

4.11 PACKAGE SUPPORTING DOCUMENTS

When you have multiple related documents, you can package them into a single document, so you do not have to download each document separately and combine them outside of Change. You can use packaged documents to send to InEight Document or send out for electronic signature.

4.11 STEP BY STEP 1 – PACKAGE SUPPORTING DOCUMENTS

You can package documents when you want to combine multiple documents into a single document.

Documents must be in Microsoft Word or Excel, PDF, or image format and come from the document source My computer to be added to a package.

1. From the Issue, Potential Change Order, or Client Change Order log, select multiple documents, and then click the **Package documents** icon.

Actio	ons 💌 🕂 🗹	\otimes $ ilde{}$				DETAILS	PRICING	SUP	PORTING		
	Title 📃	File/Link	Document type	Subtype 😐	External document t	External document s	Document source	Ŧ	Added on	Subordinate Issu	e –
	Spanish pricing summary	355_Spanish pricing su	Other				My computer		02/06/2023		
						-	InEight Document		02/06/2023		
	doc 3	testDoc.xlsx	Correspondence	Client			My computer		02/06/2023		
	doc 2	Strums.png	Checklist	Change proposalrepar			My computer		02/06/2023		
	doc 1	package doc 1.docx	Certification				My computer		02/06/2023		

The Package supporting documents dialog box opens to the Selected documents step.

2. You can select additional eligible documents to be in the package or reorder the documents in the package.

elected documents will be generated and merged into a PDF. Only 'My computer' document sources are allowed. valiable documents Selected documents Selected documents Selected documents Selected documents Title Document type Title Document type	1	Selected documents	2 Package document details					
Only 'My computer' document sources are allowed. vailable documents Search Title Document type Title Document type	Selec	ted documents w	vill be generated and merged ir	nto a PDF.				
Search Search Title Document type Title Document type	<u>(</u>	Only 'My compute	er' document sources are allov	ved.	Color	ed de currente		
Q Search Q Search Q Search Q Search Q Search → □ Title Document type	Availa	able documents			Select	ea aocuments		
□ Title Document type → □ Title Document type	Qs	Search			Qs	earch		
4 0		Title	Document type	÷		Title	Document type	1
J doc 2 Checklist T Spanish pricing su Other		doc 2	Checklist	+		Spanish pricing su	Other	4
doc 1 Certification D doc 3 Correspondence		doc 1	Certification			doc 3	Correspondence	

3. Click **Next** to go to the Package document details step.

4. Enter the title, document type, file or link name, and notes. The File/Link name field defaults to the value you enter in the Title field, but you can change it.

	ent details		
*Title		*Document type	
Pricing summary and doc 3		Other	•
*File/Link			
Pricing summary and doc 3			
Notes			2
Type message here			

5. Click **Save** to save the package as a PDF in the Supporting documents register.

4.12 MAIN AND SUBORDINATE ISSUES

Main issue adds flexibility within the tool to be able to group issues together and get a roll-up cost of all the associated issue. The grouped issues are subordinate issues to the main issue. They can be created within an issue or move an existing issue as a subordinate issue. This feature also provides the flexibility of seeing a roll-up cost of specific issues that can be tied to separate PCO/CCOs.

You can create main and subordinate issues in the following ways:

- Convert standard issue into a main issue with subordinate
- Add subordinate to main issue
- Make an existing issue into a subordinate of a main issue

$4.12\ \text{STEP}$ BY STEP 1 – CONVERT STANDARD ISSUE INTO A MAIN ISSUE WITH SUBORDINATE

- 1. Go to the Change > Issue Log tab.
- 2. Select an issue and then select the Subordinate issue icon.

				NEW 2	ISSU
÷	⊢	īci	+		
	Issue ID 📒 😇	PCO ID		Client CO ID 🔤	Issue na
R	<u>9</u>				<u>Bearing</u>
	^ <u>7</u>				<u>Bearing</u>
	7.2				<u>7.2</u>

3. Select Create subordinate.



• The following box appears, indicating that a main issue is being created and the standard issue becomes the first subordinate issue.



- 4. Select Yes.
 - The standard issue is now a subordinate issue and a main issue has been created



• The main issue becomes a rollup of all subordinate issues. The row becomes disabled as it is a summary of the subordinate issues



• In the Main issue details, only Name and Description are editable. Subordinate issues are all shown. On the details page, you can add or remove a subordinate from the main issue

Actions 👻	DETAILS	PRICING & PROPOSAL	SUPPO DOCUI	RTING MENTS			Cancel
This issue has subordinat	es and only selective	edits can be made	to the main is	sue Edit	ts made to the s	ubordinate data	will roll up
<u> </u>		to main iss	ue.				
Issue descr	intion			Sut	oordinate	issues	
Created by Susan cap	pelloni on 09/09/2019			our	Joramate	100000	
*Issue name		Issue start date			⊾ ⊝]	
Bearing Pads 3		09/03/2019			Issue ID	Current value	
Description		Hint: Date of the star	of impact		<u>9.1 - Bearin</u>	\$0.00	
			î	Curre	ent value total	\$0.00	

• Pricing is a read-only summary of the subordinate pricing

Ac	tions 🔹	Add markups	DET/	ILS PRICING	SUPPORTING DOCUMENTS		Σ	= 🗉 🕫)
								Cancel	Sav
	~	Pricing summary	ROM	Estimate	Proposal	Agreed		Contributed value	
		 Direct cost total 							\$0.
	Ð	∧ Labor							\$0
		Type labor name					8		SC
		Labor subtotal							\$0
	€	∧ Equipment							\$
		Type equipment name					8		s
		Equipment subtotal							s
	Ð	∧ Materials							\$
		Type material name					8		s
		Materials subtotal							s
	æ								

Supporting documents shows supporting documents of all subordinate items

					DETAILS	PRICI	NG & DSAL	SUPPORTIN	IG 'S		Ŧ	Clear all filters	Σ	Ŧ
This issue has subordinates and only selective edits can be made to the main issue. Edits made to the subordinate data will roll up to main issue.														
🔲 Tit	tle		File/Link		Document ty	Subtype		External doc 😇	Document s	Added on		Subordinate	Ŧ	dded by
	No result found in this project.													

4.12 STEP BY STEP 2 – ADD SUBORDINATE TO MAIN ISSUE

- 1. In the project you have been using, navigate to Change > Issue Log tab.
- 2. Select the main issue and then select the Subordinate issue icon.



3. Select Create subordinate.

			NEW 2	ISSUE LOG	POTENTIAL C LOG
+	M 🛃	+			
	Create subordinate		Client CO ID 😑	Issue name 😑	Issue start date
	Make as subordinate			Bearing Pad	09/03/2019
	<u>9.1</u>			Bearing Pad	09/03/2019
	<u>^ 7</u>			Bearing Pad	09/02/2019

• The Create subordinate issue window opens

art date
019
e of the start of impact
on 1000
e

NOTE A subordinate issue comes in as a new issue.

- 4. Fill in the required fields to complete this window.
- 5. Select Save.

• The subordinate issue will open its own record to be completed with the proper information.

	DETAILS	PRICING & PROPOSAL	SUPPORTING DOCUMENTS	PROPOSAL & PRICING	
	Issue description	ield information Sched	Ile impact Client notification	Design information	
Subordinate	SSUE descrip	otion by Susan cappelloni o	n 09/03/2019	Change orders	
*Subordinate issue name		*lssue start date	9	📴 Assign to potential change order	
Bearing Pads 3		09/03/2019	m	📴 Convert to client change order	
		Hint: Date of the	start of impact		
Description			1000		
			*		
Source/cause		Change condition	n		
None	-	None	•		
Hint: Select what prompt	ed the sourc	Hint: Select the	condition of the chan		
Scope		Assigned to			

4.12 STEP BY STEP 3 – MAKE AN EXISTING ISSUE INTO A SUBORDINATE OF A MAIN ISSUE

- 1. In the project you have been using, navigate to Change > Issue Log tab.
- 2. Select the main issue and then select the Subordinate issue icon.
- 3. Select Make as subordinate from the list.

		NEV	V 4
+	ب 🖈 🖾 🕀		
	Create subordinate	Client CO ID 🔤	Issue name 👘
	Make as subordinate		Bearing Pads
	÷ 0		Pooring Pod

• The Make as subordinate issue window opens

Issue ID/Issue i	name 🕕	
11 - Bearing Par	ls	
Issue ID/Issue	name	
1		յիդ
Issue ID	Issue name	0
9	Bearing Pads 3	^
7	Bearing Pads 2	

- 4. Select Issue ID/name to choose which Standard issue or Main issue this issue should be a subordinate of.
- 5. Click Save.
 - The issue becomes a subordinate issue
 - NOTE The Issue ID number changes from original issue number to a subordinate and is logged in the Audit log. If this subordinate is ever removed from the main issue, it reverts to its original Issue ID number.

4.13 ISSUE IMPORT

A convenient way to add multiple issues is through import using the issue import template. The issue template includes the fields found on the issue Details page.

You can also export existing issues, make changes, and reimport the data.

4.13.1 IMPORT THE TEMPLATE

From the Issue Log, click the Import icon to begin downloading.

			NEW ISS	UE 103	ISSUE LOG	PC0 L0G	CCO LOG	TASK LOG 315	ACTION ITEMS	AUDIT L	OG					View	Unsaved (All (ex	cept Parked
Actions	• • (€ 6	L	4		-						Cł	nange issue status	E Clear	all filters S	\$= []	D 9	3 0
	Issue ID	PCO ID		CCO ID	·····	Issue start date	Issue stat.	Assigned to	Approval	Responsi	Responsi	Value type	Current value	Pricing st.	Date price	Proposal _ =	Scope	Supportin
2	263				test 1	01/13/2022	New		Approved				\$0.	00				
]	264				test 2	01/12/2022	New		Approved				\$0.	00				
																		-

The Import data from template dialog box opens for you to import and save the template or for you to drop a completed template to be uploaded.

iport data nom template - Google Chrome	Construction of Charles 1977	
Import data from template		
Import issue template		
Data will be imported in to Issue log		
	Drag and drop the file here or browse	
	Browse	
	File must not exceed 5 MB	Cancel

The template is an Excel spreadsheet. The first worksheet contains the Instructions for the template. Here is where the legend and guidelines are located. The guidelines describe the information on the Import template, exporting with data, and how to update or add more information to the existing data. The second worksheet, Template, is where you enter your data for the issues. Drop-down fields are populated from the organization and project settings. The only required fields are Issue name and Issue start date. It is recommended to download a new template each time you import, so the fields and field values are current. The columns are color coded to indicate which columns are system generated, required data, optional data, and ignored data.



After you add your information and save the worksheet, you can import it.

NOTE Change validates the dates based on the person who imports the data. If the dates do not match the preferences of that person, Change generates an error in the import history and deletes the date. You must then enter the dates manually before you can complete the import.

NOTE Do not change the names of the spreadsheet tabs.

4.13 STEP BY STEP 1 – IMPORT ISSUES

Import issues into change when you want to quickly add multiple issues to the Issue log.

The import template reflects the fields on the Issue Details page. It is recommended to download the template each time you want to import issues, so the fields and field values are current.

1. From the Issue log, click the Import icon. The Import data from template dialog box opens.

Import data from template		
Import issue template		
Determitike invested in terms her		
Data will be imported in to Issue log	Drag and drop the file here or browse	
	Browse	
	File must not exceed 5 MB	
		Cancel

- 2. Click **Import issue template** to download the template.
- 3. Open the Microsoft Excel template file, and then enter the issue information on the Template worksheet. Do not change the name of the Template worksheet.
- 4. Click the **Save** icon at the top of the Template page.
- 5. Drag and drop or browse for the file to move it to the import data from template dialog box, and then click **Import**. The data is imported, and the results are sent to you in an email message when completed.
- 6. Open the email to view the results.
 - If the status is *Complete*, the issues have been added successfully. If you want to review the import you can click **Review data** to see a summary. The Import history page opens, and the process is complete.
 - If status is *Pending*, click **Review data**. The import history page opens. All errors are flagged with a warning icon.

- 7. Correct any errors and make any other changes as needed. After you have corrected or updated all fields, click **Import**.
- 8. The import is reprocessed, and the results are sent to you in an email message when completed. If you want to see a summary, you can click **Review data**.

What's next: If workflow is turned on, issues come into Change with the status *In approval*, and they do not get issue IDs until they are approved; the issue ID is *Pending*. Workflow emails are sent for each new issue included in import. If workflow is turned off, issue IDs are assigned upon import, and the status is *Not applicable*.

4.13.2 IMPORT ISSUES THROUGH AN API

You can import issues into Change using the Create Issues API. The API lets you consolidate all issues in one place by importing issues in bulk or connecting to a third-party issue creation tool. For additional information about the Create Issues API, refer to the API documentation in <u>Resources > APIM</u> Documents and the InEight API Developer Portal.

4.13.3 EXPORT THE TEMPLATE WITH DATA

The export with data function lets you make changes to multiple issues by exporting the data to an Excel template and then reimporting.

Click the **Export** icon, and then select **With data** to download a template. You can then make your changes and then follow the procedures to import the issues.

4.14 SPLIT ISSUES

At times, you may have an issue that affects multiple lines of work, where it makes sense to split the issue, so you can track the work more efficiently, effectively price it out, and view the impacts.

For example, the owner requests new access to a building and an issue is created. This involves rework to the asphalt design, railing, and structure designs, so you decide to split the issue into several issues to track each set of reworks separately.

The Split issue function is used to create multiple issues from one existing issue. When an issue is split, the original issue is reidentified as X (Original) with subsequent splits being named X (B), X (C) etc. (where X is the Issue ID number).

TIP When a split is made, only issue details, supporting documents, associated vendors and status are copied. Pricing values in the Pricing tab are not copied

The following steps walk you through how to split an issue into multiple issues.

4.14 STEP BY STEP 1 – SPLIT AN ISSUE

1. From the Change page, on the Issue Log tab, select the check box for [your initials] – Bearing Pads.

			PENDING ISSUES	3 ISSUE LOG
+	ь <u>к</u>	jej		
	Issue ID 📔 👳	PCO ID	Client CO ID	Issue name
•	38			PT-Bearing Pads
	<u>37</u>			PT - Bearing Pads
	<u>36 B</u>	PAT001_	Client Chang	<u>PAT - Bearing Pads (B)</u>

- The Split issue icon becomes available
- 2. Select the Split issue icon.

			PENDING ISSUES	3 ISSUE LOG
+	⊢	jej		
	Issue ID 🔋 👗	PCO ID 👘	Client CO ID	Issue name
	<u>38</u>	-		PT-Bearing Pads
	<u>37</u>			<u>PT - Bearing Pads</u>
	<u>36 B</u>	PAT001	Client Chang	PAT - Bearing Pads (B)

• The Split issue window appears

Split issue	
*Total number of issues needed	
Why are you splitting this issue?	400
	Cancel

- 3. Type 2 in the Total number of issues needed field to split the issue into two issues.
- 4. In the Why are you splitting this issue? field, type New bearing pad locations clash with deck penetrations.
- 5. Click Split.
 - On the Issue Log tab, your Bearing Pads issue is now two issues, parts A and B

+	لم لم	<u>i</u> di		
	Issue ID 📒 👘	PCO ID	Client CO ID	Issue name
	<u>38</u>			PT-Bearing Pads
	<u>37 B</u>			<u>PT - Bearing Pads (B)</u>
	<u>37 A</u>			<u>PT - Bearing Pads (Origi</u>
	<u>36 B</u>	PAT001	Client Chang	PAT - Bearing Pads (B)

 Note that while your original issue maintains it's pricing details, your new issue's pricing needs to be defined

With your issue now split in two, the following Step by Step walks you through adding details to the new issue, this time entering values at the Estimate level.

4.14 STEP BY STEP 2 – ADD DETAILS TO A SPLIT ISSUE

1. From the Change page, on the Issue Log tab, open the Bearing Pads (B) issue you created in the previous step.

+	ы <u>к</u>	jej		
	Issue ID 📒 👘	PCO ID	Client CO ID	Issue name
	<u>38</u>			PT-Bearing Pads
	<u>37 B</u>			<u>PT - Bearing Pads (B)</u>
	<u>37 A</u>			<u>PT - Bearing Pads (Origi</u>

- The Bearing Pads (B) issue record opens
- Note the Details tab contains all the information from the original Bearing Pads issue
- You have easy access to the other issues related to the split under the Split issue section

			Change orders
steated by paul (hpp) on 06/26/2019			
'Issue name	*Issue start date		📴 Assign to potential change order
PT - Bearing Pads (B)	06/26/2019	m	📴 Convert to client change order
	Hint: Date of the start of impact		
Description		904	Split issue
Installed bearing pads do not match pad locatio	ns on turbine generator. This is a high priority.	*	-
Source/cause	Change condition	Ŧ	37 A - PT - Bearing Pads (Original)
Source/cause	Change condition	•	37 A - PT - Bearing Pads (Original)

- 2. Select the Pricing tab.
- 3. Complete the Estimate fields with the information below (issue is not required to have ROM values completed):
 - Estimate Self perform subtotal for Small tools & Supplies: \$10,210
 - Estimate Markup subtotal (create a new markup): \$1,021

• This is a 10% Markup on your directs

rricing summary ROM Estimate Proposed Agreed CO					Contributed	
 Self perform subtotal 						\$11,231.00
Labor						
Equipment						
Materials						
Small tools & supplies		\$10,210.00				\$10,210.00
Markup (Small tools & supplies 10.00%)					\otimes	\$1,021.00

- 4. Add a vendor by selecting the Add vendor icon.
- 5. In the Estimate column for the newly created vendor, type 3,500.

ricing summary	ROM	Estimate	Proposed	Agreed CO		Contributed values
 Self perform subtotal 						\$11,231.00
Labor						
Equipment						
Materials						
Small tools & supplies		\$10,210.00				\$10,210.0
Markup (Small tools & supplies 10.00%)					\otimes	\$1,021.0
 Vendor subtotal 						\$3,500.00
Merrill Iron & Steel Inc - 7400001253 🧷 🖉		\$3,500.00			\otimes	\$3,500.0

6. In the Client pricing narrative text box, type Contractor agreed to re-use existing penetrations, pricing is for labor only. If additional material is needed contractor will submit a cost-plus invoice to client.

Client pricing narrative	
	336
Contractor agreed to re-use existing penetrations, pricing is for labor only. If additional material is needed contractor will submit a cost-p invoice to client.]	blus

- 7. Click Save.
 - **NOTE** If you have ROM / Estimate values entered in the original issue before splitting the issue and enter ROM / Estimate values in the newly created split issue B, you may need to adjust the ROM or Estimate values on the original issue as it will still have the pricing for the entire issue.
4.15 PRICING

The Pricing tab is used to collect pricing information related to your issue, so you can manage and track the current estimate price and see a progression of your pricing totals from rough order of magnitude (ROM) to Agreed. The Pricing tab can be used to record high-level pricing information in the Pricing summary or more detailed information on the Cost item pricing page. If you have more detailed pricing information related to the issue (for example, pricing sheet, pricing change from estimate, quote from sub), you can attach it to the issue under the Supporting Documents tab.

To access the Pricing tab, go to Change > Issue Log > [Issue name] > Pricing tab.

Current value	Cost	Billing markup	Markup	Margin	Dedu	ctions	Net value	lissue status	Pricing status		Proposal status	
\$8,527.61	\$7,266.92	\$1,260.69	\$0.00	17.35%	\$0.00		\$8,527.61	New	 None 	9	` ● [™] ● ●	6
Actions 👻 🕀 Add	markups			DETAILS	PRICING	SUPPORTING DOCUMENTS				Σ		D
											Cancel	Sa
> 🔗 Pricing summ	ary		ROM		Estimate		Proposal	Agreed			Contributed value	
 Direct or 	ost total											\$8,527.
 Labor 												\$8,527
Type Iabo	name									8		\$0
						\$8,527.61						\$8,527
												68.617

The Pricing tab includes the following tools to help you work.

Pricing tab - tools

	Title	Description
1	View project contract summary	Opens the Project contract summary slide-out panel that gives you a view of the current project value, projected project value, milestones, and allowance category.
2	Jump to pricing section	Lets you jump to a section of the Pricing page without scrolling.
3	Add supporting document	Opens the Add supporting documents dialog box that lets you attach a document.
4	Row density	Lets you choose the density of the rows from relaxed for easy viewing, narrow, and tight to maximize the number of rows you can see at a time.
5	Export to Excel	Exports the pricing information, including cost item pricing, into a Microsoft Excel spreadsheet.
6	Add note	Lets you add a note about the pricing.

Pricing tab - tools (continued)

	Title	Description
7	Show Pricing summary	Opens the Pricing summary page from the Cost item pricing page.
8	Show Cost item pricing	Opens the Cost item pricing page from the Pricing summary page.

4.16 PRICING SUMMARY

The Pricing summary is a register to record the total costs related to the issue that you potentially would propose to the client, should it become a change order. The Pricing summary is organized into Direct cost total, Vendor total (if you've added a vendor), and Indirect cost total.

~	Pricing summary	ROM	Estimate		Proposal	Agreed CO	Contributed value
	Direct cost total						\$16,665.0
Ð	^ Labor						\$15,150.0
	New labor		\$100,000.00	\$20,000.00	\$15,000.00	8	\$15,000.0
	Labor subtotal						\$15,000.0
	Labor issue markup (Labor 1.000%)					8	\$150.0
Ð							\$0.0
	Type equipment name					8	\$0.0
	Equipment subtotal						\$0.0
Ð	^ Materials						\$0.0
	Type material name					8	\$0.0
	Materials subtotal						\$0.0
Ð							\$0.0
	Type small tools & supplies name					8	\$0.0
	Small tools & supplies subtotal						\$0.0
	Direct cost subtotal						\$15,150.0
	Direct cost issue markup (Direct cost total 10.000%)					8	\$1,515.0
Ð	∧ Vendor total						\$0.0
	and the second sec					8	\$0.0
	Vendor subtotal						\$0.0
							\$0.0
Ð	 Time related overhead 						\$0.0
	Type time related overhead name					8	\$0.0
	Time related overhead subtotal						\$0.0
Ð	Fixed indirect cost						\$0.0
	Type fixed indirect cost name					8	\$0.0
	Fixed indirect cost subtotal						\$0.0
Ð	∧ Non billables						\$0.0
	Type non billable name					8	\$0.0
	Non billables subtotal						\$0.0
	Indirect cost subtotal						\$0.0
	Grand total						\$16,665.0
		0					\$0.0
							\$0.0
	Lump sum adjustment subtotal						\$0.0
	Ourrentuelue						\$16 66E 00

The register is organized by five value types in order of precedence:

- ROM (rough order of magnitude) –This is a quick rough estimate and is an estimation of a project's level of effort and cost to complete
- Estimate Actual estimated price
- Proposed This is the price proposal given to a client. In most cases, the estimate can be the proposal (Proposed).

- Agreed Client agreed price
- Contributed values This is the value taken from the farthest to the right of all value types. For example, if there is a price in ROM and a price in Proposed, the Contributed value equals the Proposed price

If you have subtotals for each of these values, the Contributed value always takes the value furthest to the right. For example, if you have \$12,000 in Estimate, and \$9,000 in Agreed, the Contributed value is \$9,000.

As another example of pricing, you have an issue for which you originally calculated a rough order of magnitude (ROM) of \$1,000 for Labor. You then priced the issue in your estimating system and came up with an Estimate value of \$800. Finally, you worked with the owner and came to an Agreed value of \$500. You enter these values into the Labor fields.

You also have two lines of \$100 each for Materials. One is a ROM, and one is an estimate. You do not have an Agreed price for Materials. Your subtotal value that is furthest to the right contributes to your Contributed values.

Current value	Cost	Markup	Margin	Issue status		Pricing status		Proposal status							
\$700.00	\$700.00	\$0.00	0%	New	-	None	•	Accepted by contractor	•						
Actions 👻 🤆	Add markups		DETAILS	PRICING	SUPPORTING	3 PRICING & S PROPOSAL					Σ	=	3	t≡ C	, 🗩
														Cancel	Save
Pricing summer	mary		ROM		Estimate		Proposa	a de la companya de l		Agreed CO		Contribute	d value		
∧ Direct of	cost total														\$700.00
A Labor															\$500.00
New labo	r			\$1,000.00		\$800.0				\$500.00	\otimes				\$500.00
Labor subto	tal														\$500.00
(+) ^ Equipme	ent														\$0.00
	ijoment name										\otimes				\$0.00
Equipment s	ubtotal														\$0.00
A Material	ls														\$200.00
Materials	2			\$100.00	<u> </u>						\otimes				\$100.00
Materials	1					\$100.0					\otimes				\$100.00
Materials su	ibtotal														\$200.00
 Small to 	ols & supplies														\$0.00
											\otimes				\$0.00
Small tools i	& supplies subtotal														\$0.00
Direct cost	t subtotal														\$700.00

The values furthest to the right also contribute to the totals (such as the Direct Cost total) and the Current value.

Values shown in dimmed text are summary values from the cost item pricing page and are read-only. See <u>Cost item pricing</u> for more information about these items.

4.16.1

4.17 DIRECT COST TOTAL

4.17.1 DIRECT COST TOTAL

The direct cost total has sections for Labor, Equipment, Materials, and Small tools & supplies. Each section can have multiple lines to help you break pricing down into further detail.

Each line contributes to the category subtotal, and then each subtotal contributes to, or rolls down into, the Direct cost subtotal. A markup for a section rolls down to the Direct cost subtotal. Markups to the Direct cost subtotal roll up to the Direct Cost total.

See <u>Markups</u> for more information about markups.

4.18 VENDOR TOTAL

You can add vendors directly from the Pricing summary in the Vendor total section. When you click the **Add vendor** icon, the Add Vendor dialog box opens, and you can choose from a list of available vendors to include in your Pricing Summary.

Availa	Vendor name	Contract description	Vendor ID	
Ŧ	Anixter Inc	Wire and.		
•	Byrons Office Equipment	Tax/Retention		_
•	Crewdson, Robert A	Soil Resistivity Testing		
Ð	GE Electric Company	Power Island Equipment		
÷	Add temporary Vendor			
Selec	ted Vendors			

You can add a temporary vendor from the Pricing summary section if they are not listed as an available vendor. A temporary vendor might not have a contract in the system yet or might not yet be available in your ERP system.

TIP

You can select a vendor that is already associated with the issue, PCO, or CCO, or you can manually enter a temporary vendor name and select **Add to selected vendors**. Vendors can also have more than one pricing item.

K Back to available	ble vendors		
*Temporary vende	or name		
Paul's Concrete a	and Supply	\	
	Creat	•	
	Cancer	Add to selected vehicles	
elected vendors			
			î

As a best practice, generic names such as temporary vendor, or temp vendor should not be used. The actual name of the temporary vendor should be used.

Click the **Add** button to create the temporary vendor.

A Back to available Vendors				
*Temporary Vendor name				
	Cancel	Add to selected Vendors		
	Guilder		I	
Selected Vendors				
Paul's Concrete and Supply X				

After you select **Add**, the new temporary vendor is automatically shown under the Pricing summary > Vendor subtotal section of the page.

NOTE After you receive a contract from the vendor, you can select the **Edit** icon to make additional changes and replace the actual contract that is reserved for this vendor.

4.19 EDIT VENDOR INFORMATION

To edit vendor information, select the **Edit vendor and pricing information** icon in the vendor line. The Edit vendor pricing information dialog box is shown below.

	PCO Migrated from Pricing & Proposal		\$200.0	0	Edit Vendor and pricing infor	mation				× ^
	Pricing summary	ROM	Estimate	Proposal	Paul's Concrete and Supply	-				
	Equipment subtotal			/	Hint: Replace temporary Vendor with permi	anent Vendor by typing		Vendor	notes	
Ð	∧ Materials				RFP status Ve	ndor Change order ID	Vendor Change	order status		
	Type material name				Select one 👻					
					Pricing item	ROM	Estimate	Proposal	Agreed CO	
					Type pricing item name					^
	Materials subtotal									
Ð	^ Small tools & supplies									
	Type small tools & supplies name									
	Small tools & supplies subtotal									
	Direct cost subtotal									
Ð	Vendor total									
	Paul's Concrete and Supply	[
	Vendor subtotal									
Ð	Time related overhead									~
	Type time related overhead name				Add pricing item				Cancel	Apply
	Time related overhead subtotal									
Ð	^ Fixed indirect cost									
Mar	Type fixed indirect cost name kup applied to:									×

In the Edit vendor pricing information dialog box, you can then change the vendor or add the RFP status, vendor notes, pricing items or cost items. If you used a temporary vendor, you can replace it in the Edit vendor pricing information drop-down field, as shown in the image below.

Merrill Iron & Steel Inc	•	
Hint: Replace temporal by typing Vendor name Subcontract ID	ry vendor with permanent vendor e, Contract description or	
RFP status	Vendor change order ID	
Select one	•	

NOTE After you replace the temporary vendor to the newly assigned vendor in the Edit vendor and pricing information drop-down list, all the temporary vendors are replaced with the newly assigned vendor. It is important not to use generic temporary vendor names such as temporary vendor, or temp vendor. This action cannot be undone.

After you click **Apply**, a message opens stating that all issues that contain the temporary vendor name will be replaced with the newly selected. Click **Yes** to accept.



With the vendor added, you can record pricing. This includes ROM, Estimate, Proposed, and the value you agree upon (Agreed). The value farthest to the right for each line is used in the Contributed values column.

Chan	e management > Issue -508-p10										
Curre	nt value Cost	Markup	Margin	Issue status	Pricing s	atus	Proposal status				
\$800	.00 \$800.00	\$0.00	0%	PC0	 None 		None				
				100	- Hone		None				
Actio	s 💌 🕂 Add markups		DETAIL	S PRICING	SUPPORTIN	G PRIC S PROF	ING & POSAL		$\Sigma \equiv$	t≡ €	F
										Cancel	Save
~	Pricing summary		ROM		Estimate	Prop	osal	Agreed CO		Contributed value	
_	^ Direct cost total										\$0.00
+	^ Labor										\$0.00
0	Type labor name								\otimes		\$0.00
	Labor subtotal										\$0.00
+	∧ Equipment										\$0.00
	Type equipment name								\otimes		\$0.00
	Equipment subtotal										\$0.00
+	∧ Materials										\$0.00
	Type material name								\otimes		\$0.00
	Materials subtotal										\$0.00
+	Small tools & supplies										\$0.00
	Type small tools & supplies name								\otimes		\$0.00
	Small tools & supplies subtotal										\$0.00
	Direct cost subtotal										\$0.00
+	^ Vendor total										\$800.00
	^ <u>-1140</u>								\otimes		\$800.00
	1			\$200.00							\$200.00
	2					\$500.00					\$500.00
	3					\$100.00					\$100.00
	Vendor subtotal										\$800.00
	^ Indirect cost total										\$0.00
+	 Time related overhead 										\$0.00
	Type time related overhead name								\otimes		\$0.00

The vendor's subtotals populate in the Contributed values and are reflected in the Grand total for the issue, which also becomes your Current Value.

Cost items that have a cost pricing of Vendor, come in as individual lines in the Vendor section as temporary vendors. Click **Edit** to assign the temporary vendor to an existing contract vendor. If that vendor already exists on the pricing summary page, the pricing items are combined under the vendor.

After a CCO is executed, only the Vendor field is editable, so you can replace the temporary vendor with the current vendor.

4.20 VENDOR CHANGE ORDERS

If your environment includes InEight Contract, you can associate vendor pricing items to a vendor change order (VCO) in Contract. Associating the pricing item to a VCO while in Change saves time and prevents entry errors. You can associate a vendor pricing item to an existing Contract VCO, or you can create a new VCO.

ASSOCIATE A VENDOR PRICING ITEM TO AN EXISTING CONTRACT VCO

Associate a vendor pricing item to an existing VCO when you know that a VCO in Contract already exists. Associating the pricing item from the Pricing summary can save you time. Instead of opening

Contract, you can associate to an existing VCO directly from the Change Vendor and pricing information.

The vendor must already be added to the Pricing page. The vendor must not have pricing items that have already been associated to a VCO. A value in the Vendor Change order ID- Description column on the pricing grid indicates that a VCO has already been created.

1. Click the **Edit vendor and pricing information** icon for a vendor. The Edit Vendor and pricing information slide-out panel opens.

A	Actions -	Add markups	DETAILS	PRICING
•	~	Pricing summary	ROM	Estimate
		type sman tools & supplies name		
		Small tools & supplies subtotal		
		Direct cost subtotal		
	\oplus	 Vendor total 		
		<u>Concrete Designs Inc - 7400000368</u>		
		p1	\$2,000,000.00	
		p2	\$200.00	
		Vendor subtotal		

2. Select one or more pricing items. The Associate to Vendor Change order icon becomes enabled.

RFP status	Vendo	or notes					40
Select one	•						
+ × 1							
Pricing item		ROM	Estimate	Proposal	Agreed	Vendor Chan	Statu
Item for VCO			\$100.00				1

- 3. Click the **Associate to Vendor Change order** icon. The Associate to Vendor Change order dialog box opens.
- 4. Select **Existing** as the Vendor Change order type. Enter the Vendor Change order ID.
- 5. Click **Add**. Information from the VCO populates the fields in the pricing item grid on the Edit vendor and pricing information slide-out panel.

CREATE A VCO IN CONTRACT

You can create a new VCO in Contract and associate a pricing item to it when the VCO does not already exist. This task adds the VCO to the Contract VCO log and associates the pricing item to it.

A contract for the vendor must already exist in Contract.

- 1. Click the **Edit vendor and pricing information** icon for a vendor. The Edit Vendor and pricing information slide-out panel opens.
- 2. Select one or more pricing items. The Associate to Vendor Change order icon becomes enabled.
- 3. Click the **Associate to Vendor Change order** icon. The Associate to Vendor Change order dialog box opens.
- 4. Select **New** as the Vendor Change order type.
- 5. Enter the VCO information. The Vendor Change order number, Description, and Vendor Change order type fields are required.
- 6. Click **Add**. The VCO is added to the vendor contract in Contract, and the pricing item is associated to it.

The VCO is listed on Contract's Vendor Change order log for the vendor's contract.

4.21 INDIRECT COST SUBTOTAL

The Indirect cost subtotal section contains the time related overhead, fixed indirect, and non billables summaries. These summaries are added together (rolled down) to get the indirect cost subtotal. You can add multiple lines to each section and apply markups.

4.22 MARKUPS

You can add a markup to any subtotal. Markups apply to the subtotal of each selected section, then roll up to an overall section total. For example, if there is a 1% markup for labor, and a 10% markup for the direct total cost, a \$15,000 line in the labor section has a markup of \$150, which makes the labor contributed value \$15,150. The direct cost markup is 10% of the \$15,150, so \$1,515 is added to the direct cost subtotal for a total of \$16,665. Any markups from cost item pricing are included in separate lines above the subtotal.

Action	i	DETAILS PI	RICING	SUPPORTING DOCUMENTS	PRICING & PROPOSAL			Σ	=	⊡ t≡	0	9
										Cancel		Save
*	Pricing summary	ROM		Estimate		Proposal	Agreed CO	C	ontributed valu	ie .		
	 Direct cost total 										\$16,6	565.00
\odot	^ Labor										\$15,	150.00
	New labor		\$100,000.00		\$20,000.00	\$15,000.00		\otimes			\$15)	000.00
	Labor subtotal										\$15,	,000.00
	Labor issue markup (Labor 1.000%)							\otimes			S	\$150.00
٠	↑ Equipment											\$0.00
	Type equipment name							8				\$0.00
	Equipment subtotal											\$0.00
\odot	∧ Materials											\$0.00
	Type material name							\otimes				\$0.00
	Materials subtotal											\$0.00
\odot												\$0.00
	Type small tools & supplies name							\otimes				\$0.00
	Small tools & supplies subtotal											\$0.00
	Direct cost subtotal										\$15,1	150.00
	Direct cost issue markup (Direct cost total 10.000%)							\otimes			\$1,	,515.00

All markups are located directly underneath the subsection and apply to the level (that is, Issue, PCO, or CCO) you are applying them in. In a PCO, the markups from the issue are above the PCO subtotal line, and the markup added at the PCO is below the subtotal. This is because multiple issues can be collected into a PCO, and then a PCO level markup is applied to all the associated issues. The following image shows the issue-level markups and new markups at the PCO level.

Actio	ns 👻 🔶 Add markups		DETAILS	PRICING	SUPPORTING DOCUMENTS	WORKFLOW	PRICING & PROPOSAL	Σ	=	•	t= 🖪) 🕞
										С	ancel	Save
\approx	Pricing summary	ROM	Estimate		Proposal		Agreed CO		Contributed	value		
	 Direct cost total 										\$2	656.50
\odot	∧ Labor										s	2,656.50
	Type labor name							\otimes				\$0.00
	∧ Issue 42 -										s	1,150.00
	PCO Adjustment	\$600.00										\$600.00
	Base paving	\$550.00										\$550.00
	∧ <u>Issue 29</u>										s	1,150.00
	PCO Adjustment	\$600.00										\$600.00
	Base paving	\$550.00										\$550.00
	Labor (Labor 10.000%)											\$230.00
	Labor subtotal										s	2,530.00
	PCO level labor markup (Labor 5.000%)							\otimes				\$126.50
€	∧ Equipment											\$0.00
								-				

In a CCO, the markups from the issue and the PCO are above the CCO subtotal line, and the markups added at the CCO is below the subtotal, so you can collect multiple PCOs into a CCO and then apply a CCO level markup to all the associated PCOs.

You can hover over markups in a PCO or CCO to see level where the markup has been added to give you visibility. Markups are indicated by orange arrows. If you hover over the arrow, you can see the type of markup, the name or ID, and the markup amount.

A Issue 29-				
PCO Adjustment		Markup	applied to:	
Base paving		Туре	ID - Name	Markup
abor (Labor 10.000%)	×	Issue	29-Parking Lot Ad	\$115.00
abor subtotal			Lo ronning Lorina.	
CO level labor markup (Labor 5.000%)		Issue	42-Parking Lot Ad	\$115.00
Equipment				

To add a markup, click the **Add markup** icon at the top of the page. The Add markup dialog box opens, and you can select from available markups or add a manual markup. A markup can have up to three digits before the decimal.

Ac	tions 🗨	+%	DETAILS	PRICING SUPPORTIN DOCUMENT	IG 'S
»	~	Pricing summary	ROM	Estimate	Proposal
_		 Direct cost total 			
-	\oplus	∧ Labor			
		Type labor name			
					\$ 142.272
		Labor markup 1 (Labor cost item pricing 5.000%)			
ary		Labor test (Labor cost item pricing 1.000%)			
umm		Labor subtotal			
g		Labor (Labor 10 000%)			

You can also add markups at different calculation levels to the grand subtotal. See <u>Markup calculation</u> <u>levels</u> for more information.

4.23 DEDUCTIONS

The Deductions section lets you reduce or allocate value to one or more specific cost items. The Deduction value can only be populated from the Cost item pricing tab and produces a net value of overall change issue. For example, for a current value of \$10,000 with deductions of -\$7,500, the net value is \$2,500. To produce a negative deduction, you must use a negative quantity.

4.24 COST ITEM PRICING

Cost item pricing lets you build an estimate using existing cost items from InEight Control and calculate an adjustment value based on an adjusted quantity using existing current budget or current estimate rates. This provides easier estimating and continuous contract adjustment in Control and gives visibility into how the estimates were derived. Refer to the Control documentation for more information about cost items.

Cost item pricing is available at the issue level only.

Upon execution of a CCO, the cost pricing information goes to Control as a contract adjustment. Assigned cost items automatically populate the contract adjustment to provide a more continuous experience. Refer to the Control documentation for more information about budget and revenue details from Change.

4.24.1

4.25 COST ITEM PRICING TAB

When you go to the Pricing tab in an issue, the Pricing summary page opens. Click the expansion arrows to go to the Cost item pricing page.

\$49.03 \$94.69 \$53.20 \$3.32 \$48.2% \$0.00 \$49.03 New N	Current value	Co	st	Billing markup	Markup	Margin		Deducti	ons		Net value	Issue	status		Pricing status		Pro	posal status		
Action O S Cost and more shares S<	\$49.03	\$94	4.69	(\$52.98)	\$7.32	-48.22%		\$0.00			\$49.03	Ne	r	•	None		• •	one		•
Image: Note of the strate	Actions 👻 🔶					DETAILS	_	PRICING	SUPPORTING DOCUMENTS		PRICING & PROPOSAL			문 Clea	ar all filters	Σ	≡ 6) t ≡	3	Ð
Image: Contraction of the description o		_																Cancel	Sav	•
Operating summary Cost item pricing Low 1.2 Status	~		Cost item description	WBS phase code 👘	Cost pricing -	Adjusted CB Qty	UoM	-	Adjusted MHrs	Ŧ	MHrs/Unit	- Un	a/MHr ──	Unit cos	t 🦷	Adjuste	d cost	Billing rate r	n_ =	ðillin 🔲
16	Pricing summary		Cost item pricing							1.42							\$94.0	9		(\$
Control Lobor Lobor <thlobor< th=""> Lobor Lobor <t< th=""><td>Cost item pricing</td><td>Labor</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>1.08</td><td></td><td></td><td></td><td></td><td></td><td></td><td>\$69.</td><td>72</td><td></td><td>^</td></t<></thlobor<>	Cost item pricing	Labor								1.08							\$69.	72		^
Small bools & supplies 52457 52457 52457 Image: Small bools & supplies 1.00 Cr 0.04 0.04 22.53 53.17 53.17 10.00% Image: Small bools & supplies 1012 Small bools & supplies 0.00 Cr 0.03 0.03 33.22 52.18 52.16% -265.40% -265				1011	Labor	12.0	0			1.08	0.0	09	11.11		\$5.8	1	\$69.	72	6.55%	
Image: Constraint of the supplex 1.00 Cr 0.04 0.04 2.233 53.17 53.17 10.06% Image: Constraint of the supplex 100 Cr 0.30 0.00 33.22 \$2.18 \$22.40 \$25.40% -265.40%		Small	tools & supplies							0.34							\$24.	97		
1012 Simal tools & spples 10.00 CY 0.30 0.03 33.22 52.18 622.80 -266.40%		0		1013	Small tools & supplies	1.0	D CY			0.04	0.0	04	22.53		\$3.1	7	\$3.	17	10.06%	
				1012	Small tools & supplies	10.00	D CY			0.30	0.0	03	33.22		\$2.1	8	\$21.	80 -2	65.40%	

You can add either an existing or a new cost item. The cost item can be one of the following types:

- Plug Unit and total costs are entered at the cost category level
- Detail Resources are defined to determine costs

An existing cost item has already been established in InEight Control. When you add an existing cost item, details are pulled from Control. When you add a new cost item, you must add the detail information, such as UoM and a pay item. The detail information is added in Control when the CCO is executed and approved in Control. See <u>Edit cost items</u> for information about the types of details that can be edited for existing and new cost items. The number of cost items you can add is not limited in an issue. However, if you convert the issue to a change order or use it in a budget move, you are limited to 250 unique cost items or 100 unique pay items.

You can use the icons in the left toolbar to add, edit, delete, or copy cost items. You can also right-click in the grid to get a context menu with the same options. You can also import new Plug items from a Microsoft Excel spreadsheet into cost item pricing.

Actions				
»	Cost item description \pm WBS phase code \pm	Cost pricing	Ŧ	Adjus
	Cost item pricing			
Labor				
Cost Item pricing	•• Add existing cost items •• Add new cost item •• Add new cost item •• Edit cost item pricing •• Copy cost item •• Delete cost item pricing	Labor		

The fields that are available for you to add values to and edit depend on the cost item type and the unit rate driver. See <u>Edit cost items</u> for information about editing plug and detail cost items.

4.25 STEP BY STEP 1 – ADD AN EXISTING COST ITEM

Add cost item pricing when you want to add detail to your pricing. Cost items are based on the CBS structure from Control. The unit rate driver for an existing cost item defaults to the current estimate. You can edit the unit rate driver after the cost item is added.

Only active terminal cost items are available for selection in cost item pricing.

1. From the Cost item pricing page, click the **Add cost item pricing** icon or right-click anywhere in the grid.

NOTE If you add from the Add cost item pricing icon, all cost pricing types are available. If you add from a right-click, all pricing types except *Vendor* are available.

- 2. Select **Add existing cost items**. The Add cost item pricing dialog box opens with the CBS structure from Control. The cost items use the same color coding as they do in Control.
- 3. Select a cost item from the Select cost items section of the Add cost item pricing dialog box. Available cost items have the Add icon. Parent WBS codes have a selection box that automatically selects all the cost codes underneath it. You can use column choosers to select the columns you need to identify the cost item. You also can remove items you do not want to see. The cost item is added to the Select cost pricing pane, and the entry in the Select cost items section is dimmed.

Sele	ct cost item	าร				Select	cost pricing		
					Q	Θ	🕞 🔂 Group cost pr	icing	Q
	CBS posit	Description =	WBS	Account codes			Description	WBS phase code	Cos
	^ 1	Financial Res	1000		-	Undefine	d		-
	A 1.1	Financial Res	1001				216th Fascia - Fab Forms	1184	Sele
	∧ 1	Direct Labor	1002				216th Fascia Walls - F/P/S	3204	Sele
		Civil	1003				Maintain Buildings During	2308	Sele
Ð		Maintain Build	2308	50.98.99					
		MOT (Install &	1004						
÷		MOT Labor	1005	54.02.04					
÷		Flagger Crew	1007	54.02.04					-
		Environmental	1008		-	Selected :	3		•

Repeat this step for each cost item you want to add.

4. Assign the cost pricing category (for example, labor or materials) by selecting the cost item in the Select cost pricing section, and then choosing one of the options in the Cost pricing column. If there are multiple cost items that are in the same category, select them, and then click **Group cost pricing**.

After all cost items have a pricing category, the **Add** button becomes available.

5. Click Add.

Change pulls the following fields from Control:

- WBS
- Description
- UoM
- Forecast (T/O) qty
- Current CB Qty
- Mhrs/Unit
- Unit/Mhr
- Unit cost
- Cost source
- Resources

- Billing rate markup % (Calculated based on resource billing rates for cost source detail cost items that have resources assigned with billing rate markups)
- 6. If you have the pricing information, enter a value in the Adjusted CB Qty column. Change calculates the values for the Adjusted cost, Updated CB qty, and Adjusted man-hours fields, if applicable, based on the current budget or current estimate rates. The value you enter in the Adjusted CB Qty field cannot make the value in the Updated CB Qty field less than zero. Each cost item defaults to current budget rates. If you change the Unit rate driver field from current estimate to current budget, Change calculates the adjusted cost and adjusted man-hours based on those unit rates. If you do not have the pricing information you can automatically calculate values to get adjusted values from Control. See <u>Auto calculate cost items</u> for information about automatically calculating cost items.

If a cost code is assigned to only one contract, Change automatically brings in that contract association, so you do not have to look for the contract. The cost pricing defaults to *Vendor*, but you can change it. After the cost item is added, Change automatically assigns the cost item to the vendor and contract number. The vendor is editable.

- NOTE A negative quantity can be entered if it is smaller than the Current CB Qty column. You can use negative numbers in deductions so that Change calculates a true negative deduction.
- 7. Click **Save**. The cost items are added to the Cost item pricing page and the Pricing summary page.

The cost items can be edited from the Cost item pricing page. When you edit the description, it is shown in the Cost item pricing grid, but is not carried over to InEight Control. The cost items are read-only on the Pricing summary page.

4.25 STEP BY STEP 2 – ADD A NEW COST ITEM

Add a new cost item pricing when you want to add detail to your pricing, but the pricing item does not exist in Control.

If you are adding a plug cost item, the adjusted cost is driven by the values in the Details tab. After the adjusted cost is calculated, the Cost categories tab shows a breakdown. If you are adding a detail cost item, the adjusted cost is calculated using the resources on the Resources tab.

1. From the Cost item pricing page, click the **Add cost item pricing** icon or right-click anywhere in the grid.

NOTE

If you add from the Add cost item pricing icon, all cost pricing types are available. If you add from a right-click, all pricing types except *Vendor* are available.

- 2. Select Add new cost item. The New cost item slide-out panel opens.
- Enter the description, and then indicate whether the cost item has a cost source of Plug or Detail.
- 4. Enter the cost item information on the Details page.
 - If the cost source is plug, you can enter information in any of the fields.
 - If the cost source is detail, you can enter information in the Description, Adjusted CB Qty, UoM, and Cost pricing fields only. The value you enter in the Adjusted CB Qty field cannot make the value in the Updated CB Qty field less than zero. The other fields are populated after you have added resources on the Resources tab.
- 5. Click **Apply**. The pricing item is added to the Cost item pricing grid.
- 6. Click Save. Change sends the cost item to Control, and the WBS phase code is set to New.

You can edit the cost item to add more information regarding resources or cost categories. After the CCO is executed, you can see the newly created cost item in the Control contract adjustment. When the contract adjustment is approved in Control, a WBS is assigned. You can see the WBS phase code in the CBS and the WBS number is reflected in the executed issue cost item pricing.

NOTE The cost item cost category in Control corresponds to the cost pricing section in Change the item was assigned to. If there are any man-hours on the new cost item, that portion of the value is allocated to the Labor cost category, and the remaining value to the category mapped to the cost pricing selected.

4.26 AUTO CALCULATE COST ITEMS

The Change auto calculate feature lets you start your cost item pricing work with the most current adjusted values from InEight Control. With auto calculation, changes to the current estimate in Control populate change order values, resulting in matching CE and CB values after the change order is completed.

The auto calculate feature subtracts the current budget from Control from the current estimate in Control to update the adjusted CB cost in Change. When you auto calculate a value, other values

associated with the value are also adjusted. For example, if you recalculate the adjusted quantity, the unit cost changes. When you recalculate man-hours adjusted man-hours, man hours per unit, unit per man-hour, and labor cost per man-hours are updated.

4.26 STEP BY STEP 1 – AUTO CALCULATE COST ITEMS

Summary: Using auto calculated cost items is helpful in the early stages of cost item pricing when you might not have access to budgets, estimates, and cost categories. Change calculates the adjusted values from current budget and estimate values from Control.

Considerations: Auto calculate is for existing plug cost items only. If you recalculate a detail cost item, Change shows a message saying it will change the detail cost item to a plug cost item. Auto calculate is not available for new cost items, dependent cost items, or markups.

The recalculation uses the values from Control. Values previously entered in Change are overwritten by values from Control.

Quick steps:

1. From the Cost item pricing page, select a cost item, and then click the **Auto calculate** icon. The Auto calculate dialog box opens.

C \$	urrent va	alue (Cost S		Billing ma \$	arkup		Markup \$		Mar	kup % %		[Deductions	
A	ctions •	• 🕀 🗹	⊗ ⊡ ∎		8 +%	88						DETAILS	1	PRICING	_
>>		Cost item description	WBS phase code	-	Pay item	100	Cost pricing		Adjusted CB Qty	Ŧ	UoM		-	Adjusted MHrs	
		Cost item pricing						\$ 426.67							5.
	Labor														Ę
		LC TASK NAME TEST12	LC1234.TEST12				Labor				Ea				C
		ADJUST SEWER MANH	1234				Labor			1.00	Ea				Ę
		REWORK E/L/B SEWER	1648				Labor			1.00	LF				C

2. Select the fields you want to match the current budget values with the current estimate values. You can select multiple values. When you select **Cost** or **Select all**, Change recalculates the cost categories. Click Apply. Change recalculates the cost item.

	×
Auto calculate	
Match current budget values with current estimates values	
Select all	
Cost	
Quantity	
MHrs	
Cancel Apply	

4.27 IMPORT COST ITEMS

Importing cost items from other sources, such as a Microsoft Excel spreadsheet or from InEight Estimate can save time and reduce errors when adding cost items to cost item pricing.

4.27.1 IMPORT COST ITEMS FROM AN EXCEL SPREADSHEET

When you need to add a large number of plug cost items to cost item pricing, you can add them to an Excel template, and then import them into Change. The import function lets you import new and existing cost items with the cost source Plug into cost item pricing. Any plug cost item that is in the current project is eligible for import.

If you import an existing cost item, the description that is configured in InEight Control is imported by default. To change how the description of the cost item is shown in Change, enter a new description in the Description field of the template. When the Description field is blank, Change uses the description provided by Control. In the following image, the cost item with WBS phase code 1064 has no updates to the description, so the description from Control is imported. The item with phase code 1063 has a new description for this project. A new cost item has also been added on line 6.

	• :	$\times \checkmark f_x$								
1	А	в	с	D	E	F	G	н	1	J
	Leave blank = New									
	Cost item			Ignored for						
1				existing	Select Cost pricing					
2	WBS phase code	Description	Adjusted CB Qty	UoM	Cost pricing	Adjusted cost	Unit cost	Adjusted MHrs	Labor Adjusted cost	Labor Billing rate markup
3		Text	Numeric	Select one	Select one	Numeric	Numeric	Numeric	Numeric	Numeric
4	1064			Ea	Equipment			0	300	
5	1063	new description		Ea	Labor			40	4000	
6		new cost item		Hour	Labor					
7	1007	line 7	10	Liter	Small tools & supplies	600		20	600	
8										

The next image shows the items after they have been imported into cost item pricing. The new cost item has been added, the item with phase code 1063 shows the new description, and the item with phase code 1064 shows the description from Control.

A	Actions 🗨	• • • •		8 +% 📲			DETAILS	PRICING	SL D(
>>		Cost item description =	WBS phase code	Pay item 👘	Cost pricing =	Adjusted CB Qty	UoM =	Adjusted MHrs	- N
~		Cost item pricing			\$ 4,900.00				60.00
	Labor								40.00
=		new description	1063		Labor	0.00	Ea		40.00
		new cost item	New		Labor	0.00	Hour		0.00
	Equipmen	nt							0.00
icing		Tower Crane Foundatio	1064		Equipment	0.00	Ea		0.00
em pr	Small tools & supplies								20.00
ost ite		line 7	1007		Small tools & supplies	10.00	CY		20.00
~									

Change also calculates the Man-hours per unit, Units per man-hour, and Labor cost per man-hour fields using the Adjusted CB Qty, Adjusted Mhrs, and Labor Adjusted cost values. In the template image above, line 7 shows an Adjusted CB Qty value of 10, Adjusted Mhrs value of 20, and a Labor Adjusted cost of 600. The following image shows the calculated Mhrs/Unit and Unit/Mhr values. To see the Labor cost per man-hour, click the **Edit** icon.

A	tions	• 🕑 🖻 😢	. 🖷 🛤 🖇	8 +% ==			DETAILS	PRICING	SUPPORTING DOCUMENTS			Ξc	Σ Ξ [t≣ [7
														Cancel
>>		Cost item description 👳	WBS phase code 👳	Adjusted CB Qty 👘	UoM -	Adjusted MHrs	MHrs/Unit 📃	Unit/MHr -	Unit cost	Adjusted cost 👘	Billing rate ma 👳	Billing rat 👻	Markup -	Adjusted billabl 👳
		Cost item pricing				60.00				\$ 4,900.00		\$ 0.00	\$ 0.00	\$ 4,900.00
	Labor					40.00				\$ 4,000.00		\$ 0.00	\$ 0.00	\$ 4,000.00
=		new description	1063	0.00	Ea	40.00	0.00	0.00	\$ 0.00	\$ 4,000.00	0.00%	\$ 0.00		\$ 4,000.00
		new cost item	New	0.00	Hour	0.00	0.00	0.00	\$ 0.00	\$ 0.00	0.00%	\$ 0.00		\$ 0.00
	Equipme	nt				0.00				\$ 300.00		\$ 0.00	\$ 0.00	\$ 300.00
ricing		Tower Crane Foundatio	1064	0.00	Ea	0.00	0.00	0.00	\$ 0.00	\$ 300.00	0.00%	\$ 0.00		\$ 300.00
d ma	Small to	ols & supplies				20.00				\$ 600.00		\$ 0.00	\$ 0.00	\$ 600.00
ost ite		line 7	1007	10.00	CY	20.00	2.00	0.50	\$ 60.00	\$ 600.00	0.00%	\$ 0.00		\$ 600.00
0														

4.27 STEP BY STEP 1 – IMPORT PLUG COST ITEMS

Importing cost items can save you time when you have to add a large number of cost items. You can enter the items into an Excel template, and then import them into Change.

The import function is for new and existing plug cost items only. If you have changes to make to existing items, you must edit them instead of importing new ones. If you enter a WBS phase code, you must use a code that already exists in Control. New cost items do not have a WBS phase code, and the field in the template must be left blank.

The Excel template reflects the current settings for the organization and project. It is recommended that you download a new template each time you import items. You can refer to the Instructions tab of the template for information about importing, validations, and limitations.

1. From the Cost item pricing page, click the **Import** icon in the toolbar. The Import data from template window opens.

Actions	•	Ð	ľ	\otimes	Œ	DETAILS	PRICING	SUPPORTING DOCUMENTS	= c	Σ	≡	3	\$≡	C7	C	見
														Cancel	Sa	ive

- 2. Click Import cost item template to download the template.
- 3. Open the template, and then add the plug cost items to the template. The columns with orange headers are required. To change the cost category distributions of existing cost items, enter the value in the corresponding field of the template.



E Do not change the names of the spreadsheet tabs.

- 4. Save the template with a unique name.
- 5. Drag and drop the template to the Import data from the template window, and then click **Import**. After importing, you receive an email message listing status, the total cost items, the total imported, and number of errors.
- 6. If the status is *Pending*, you can click the **Review data** link to see the cost items that have completed and those with errors. If the import details page shows an error in the WBS phase code column, you can use the drop-down list to select a valid WBS phase code.
- Correct the cost items with errors from the Import history grid, select them, and then click
 Import to continue with the import process. The import is reprocessed, and Change sends you
 an email message when the import is completed.
 - NOTE If there is an error in an interdependent field such as an adjusted cost, the Import history grid shows an error for every related field. When you correct the error in one field, the others automatically recalculate but might still show an error if you did not click in those fields. After you correct the original error, you can click **Import**.

You can view the import history for cost item pricing by selecting **View import history** from the Actions menu.

4.27.2 IMPORT COST ITEMS FROM ESTIMATE

An Estimate user can publish cost items that you can then import into Change. Before an Estimate user can publish the cost items, Estimate must be integrated with Change. Refer to the <u>InEight Estimate</u> Integration to Change document for information about integration.

After Estimate has been integrated with Change, the Estimate user can publish the cost breakdown structure (CBS) to Change. The CBS file can contain both Plug and Detail cost items, but only Plug items are imported to Change.

You can access the published file from the Import history page for any issue in the project. The file can only be consumed one time in Change.

On the Import history page, the file name for the imported file is the Estimate project ID followed by the Estimate project description. The file location is *InEight Estimate*, and the status is *Pending*. You can then click the link in the Status or Total records column to select the file.

le name	File location	Status	Total records	Errors	Total imported	Last imported by	Last modified on
02447 - Border west Project	InEight Estimate	A Pending	2	3	0	InEight Service Account	09/05/2024 08:19 AM
and the second second second							

The cost item pricing items are imported with the Import status of *Error* in the import history Details page because they do not have a Cost pricing value assigned. You can select cost pricing values for the cost items you want to import to the issue. Any cost item that does not have a Cost pricing value selected is not imported.

Each cost item has a WBS code of *New*. They are assigned WBS phase codes after they are executed in a client change order (CCO).

IMPORT COST ITEMS FROM ESTIMATE

Summary: Import cost items into Change after the cost items are exported from Estimate, so you can use them for cost item pricing in an issue. Refer to <u>Cost items for change management</u> in Estimate for more information about publishing files to be imported into Change.

Considerations: These steps start after the project file has been published from Estimate.

Because the imported file can only be consumed one time in Change, if you want to use cost items that were not imported in another issue, the file must be published again from Estimate.

- From an issue's Cost item pricing or Pricing tab, open the Import history page (Pricing > Cost item pricing> Actions > View import history), and then click the link in the Status column to open the import history details page.
- 2. From the history page, select the cost pricing type for each cost item you want to import.

				< Find pr	evious 3 errors remaining	Find next >					Cancel import	Import
Import status	WBS phase code	Description	Adjusted CB Qty	UoM	Cost pricing	Adjusted cost	Unit cost	Adjusted MHrs	Labor Adjusted cost	Labor Billing	Construction Equipme	Construction
Error	New	Job Financing	1.0000	Lump Sum	Select one 🔹 🔮	\$ 0.0000	\$ 0.0000	0.0000	\$ 0.0000	\$ 0.0000	\$ 0.0000	\$ 0.0000
Error	New	Cost item A	1.0000	Each	Select one 👻 🔮	\$ 1,300.0000	\$ 1,300.0000	0.0000	\$ 0.0000	\$ 0.0000	\$ 800.0000	\$ 0.0000
Error	New	Cost item B	1.0000	Each	Select ogg	\$ 3,740.0000	\$ 3,740.0000	0.0000	\$ 1,005.0000	\$ 0.0000	\$ 765.0000	\$ 0.0000
					Equipment Materials Small tools & su Vendor Time related ov							

3. Click **Import**. Only the items that have no cost pricing type errors are imported. Values on the cost item's Details and Cost categories tabs are imported with the cost item. The items show in cost item pricing with a WBS code of *New*.

What's next: Change sends a confirmation email when the import is complete.

4.28 DEPENDENT COST ITEMS

Dependent cost items are cost items with values calculated based on a percentage of the cost of other items. Examples include insurance the company carries, bonds, and labor overhead. The value of the cost item is calculated using the configured percentage and the adjusted billable amount of all items in a section. For example, if you add a dependent cost item that is configured at 2% for the Labor section, and the adjusted billable amount for all labor cost items is \$4000, the dependent cost item value is \$80.

A	ctions 🗨	• • • • 8	• 🖷 🖷 🖇	₿ +%				DETAILS		PRICING	SUPPORTING DOCUMENTS					Σ	= 0) t≡
>>		Cost item description 👳	WBS phase code 👘	Dty =	UoM -	Adjusted MHrs	MHrs/Unit	Ŧ	Unit/MHr	-	Unit cost 👘	Adjusted cost 👘	Billing rate ma	Billing rat_ 😇	Markup	Ŧ	Adjusted bill	labl =
		Cost item pricing				0.0	10					\$ 4,080.00		\$ 0.00		\$ 0.00	\$ 4	,080.00
	Labor					0.	00					\$ 4,080.00		\$ 0.00		\$ 0.00	\$	4,080.00
=		Install UG SB Pipe Cs	1140	0.00	LF	0.	00	0.00		0.00	\$ 0.00	\$ 500.00	0.00%	\$ 0.00				\$ 500.00
		Install UG SB Fusion Jo	1142	0.00	LF	0.	00	0.00		0.00	\$ 0.00	\$ 1,000.00	0.00%	\$ 0.00			s	1,000.00
		Install UG SB Welding	2758	0.00	PLS	0.	10	0.00		0.00	\$ 0.00	\$ 2,500.00	0.00%	\$ 0.00			s	2,500.00
ricing		Insurance for labor	4143	0.00	PLS	0.	10	0.00		0.00	\$ 0.00	\$ 80.00	0.00%	\$ 0.00				\$ 80.00
item pr																		

You can configure dependent cost items in the project level configurations (Settings > Configurations > **Dependent cost items**) or you can add them manually.

4.28 STEP BY STEP 1 – ADD AN EXISTING DEPENDENT COST ITEM

Add a dependent cost item when the value of a cost item is based on the values of other cost items in the same section.

A dependent cost item must already be configured in the project settings.

1. From the Cost item pricing page, click the **Add dependent cost item** icon. The Add dependent cost item dialog box opens.

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ase code 😇 Cost pricing 😇 Adju	dd dependent cost item				Search		X djusted co
\$ 0.00	vailable dependent cost items					۲	
	Dependent cost item nam	ne \Xi Cost percentage	Applied to	section _	Assigned WBS	-	
	Labor insurance	2.00	Labor		1002	A	
	Add manual dependent cost	t item				Ŧ	
	elected dependent cost items						
						Ĵ	
					Cancel	Add	

- 2. In the Available dependent cost items section of the dialog box, click the **Add** icon for the dependent cost item. The selected items are shown in the Selected dependent cost items section of the dialog box. You can add multiple cost items.
- 3. Click Add. The dependent cost item is added as a line on the Cost item pricing page.
- 4. Click **Save** on the Cost item pricing page.

If a cost item for the section named in the cost item has already been added, Change calculates the Adjusted cost of the dependent cost item based on the adjusted costs of the cost items in the section.

4.28 STEP BY STEP 2 – ADD A NEW DEPENDENT COST ITEM

When you want to add a dependent cost item, and it has not been configured, you can create it and add it manually.

The dependent cost item is added to this cost item pricing only and is not available for future pricing. If you plan to use a dependent cost item for multiple issues, it is best practice to define it in project settings.

1. From the Cost item pricing page, click the **Add dependent cost item** icon. The Add dependent cost item dialog box opens.

E # +%	DETAILS PRICING SUPPORTING DOCUMENTS
de 😇 Cost pricing 🥃 Adju:	Add dependent cost item Q
\$ 1,133.22	Available dependent cost items
	Dependent cost item name 👳 Cost percentage 🚎 Applied to section 👳 Assigned WBS 👳
Labor Labor Labor	No dependent cost items has been added for this project Dependent cost items must be added within project settings.
	Add manual dependent cost item Selected dependent cost items
	Cancel

2. Click Add manual dependent cost item. A slide-out panel opens in the dialog box.

\langle Back to available dependent cost items			
*Dependent cost item name	*Cost percentage	*Applied to section	*Assigned WBS
Enter dependent cost item name	Enter percentage	Select one	Type WBS ID/Description
			Hint: Type WBS ID or WBS description
		Cancel	Add to selected dependent cost items
Selected dependent cost items			

- 3. Enter the dependent cost item information, and then click the **Add to selected dependent cost items button**. The new cost item is shown in the selected cost items section. You can add multiple cost items.
- 4. Click Add. The dependent cost item is added as a line on the Cost item pricing page.
- 5. Click **Save** on the Cost item pricing page.

If a cost item for the section named in the cost item has already been added, Change calculates the Adjusted cost of the dependent cost item based on the adjusted costs of the cost items in the section.

4.28 STEP BY STEP 3 – EDIT A DEPENDENT COST ITEM

You can edit the Adjusted CB Qty for any dependent cost item or the Cost percentage for a manual dependent cost item.

On the Details tab, the Cost percentage field for a manual dependent cost item and the Adjusted CB Qty field for any dependent cost item are the only editable fields. The remaining fields on the Details tab and those on the Dependency and Cost Categories tab are for information only. The Dependency tab shows the items that are used to calculate the dependent cost item. When you add a dependent cost item to the grand total, the Dependency tab shows all cost items used to calculate the value.

The Cost percentage field in the Edit slide-out panel is disabled when the dependent cost item was configured in the project settings.

- 1. From the Cost item pricing grid, select the dependent cost item, and then click the **Edit** icon. The Edit slide-out panel opens.
- 2. On the Details tab, enter a new value in the Cost percentage field, if it is a manual dependent cost item. If the field is disabled, the dependent cost item was configured at the project level and cannot be edited. You can also enter an adjusted cost.
- 3. Click **Apply**. Change uses the updated cost percentage to calculate the value of the dependent cost item. If you entered an adjusted cost, Change calculates the unit cost.
- 4. Click **Save** on the Cost item pricing page.

4.29 MARKUPS

You can add a markup to any cost item. Markups can be applied to any section, including the grand total. After the cost item is saved, the markup is carried over to the pricing page and is included in the

subtotals for each section. They are also included in the Markup field in the issue header.

Markups can be based on a percentage, or they can be a specified markup. When you specify a value markup, you can specify the amount of the markup. That value is applied regardless of the amount in the cost item sections. Value markups are always level 0 and can also be applied to the grand total at level 0. For information about markups based on percentages, see <u>Markups</u>. For information about markup levels, see <u>Markup calculation levels</u>.

The following image shows the cost item pricing with a 100% markup percentage and a markup value of \$100 in the Labor section, a value markup of \$100 in the equipment section, and a value markup of \$200 dollars in the grand total.

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												(Cancel	Save
	Cost item description	WBS phase 😇	😇 Adjusted MHrs 👳	MHrs/Unit 👳	Unit/MHr =	Unit cost 👘	Adjusted cost 👘	Billing rate ma	Billing rat 👳	Markup 😇	Adjusted billabl 😇	Unit rate driver	👳 Prie	icing item
	Cost item pricing		68.563883				\$ 2,796.254325		\$ 0.000000	\$ 2,536.890296	\$ 5,333.144621			
Labor			57.196977				\$ 2,336.890296		\$ 0.000000	\$ 2,436.890296	\$ 4,773.780592			
	Torch CMP Metal @ Pier Caps (Install b	1016	7.015159	7.015159	0.142548	\$ 248.177778	\$ 248.177778	0.00000000%	\$ 0.000000		\$ 248.177778	Current Estimate	Cos	st item
	GB/PC - Bulkhead,R&B Templates - La	1015	50.181818	25.090909	0.039855	\$ 1,044.356259	\$ 2,088.712518	0.00000000%	\$ 0.000000		\$ 2,088.712518	Current Estimate	Cos	st item
	Labor value markup (Labor cost item p.,									\$ 100.000000	\$ 100.000000		Ma	arkup
	M1 (Labor cost item pricing 100.00000									\$ 2,336.890296	\$ 2,336.890296		Ma	srkup
Equipme	int		11.366906				\$ 459.364029		\$ 0.000000	\$ 100.000000	\$ 559.364029			
	ST&S and Materials	1003 - 800	0.000000	0.000000	0.000000	\$ 1.000000	\$ 10.000000	0.00000000%	\$ 0.000000		\$ 10.000000	Current Estimate	Cos	st item
	Grade Beams/Pier Caps Excavate / Fin	1006 - abc	11.366906	1.136691	0.879747	\$ 44.936403	\$ 449.364029	0.00000000%	\$ 0.000000		\$ 449.364029	Current Estimate	Cos	st item
	Equipment value markup (Equipment c									\$ 100.000000	\$ 100.000000		Ma	arkup

Value markups are included in the grand total summation before the grand total is multiplied by the percentage based markup. For example, the image below shows a grand total for an adjusted cost of \$5000. A 10% percentage markup (\$500) and a \$60 value markup are applied at level 0. The 5% markup at level 2 is calculated from \$5560, which is the adjusted cost plus the two level 0 markups.

		Cost item description	- WBS phase code -	Unit/MHr	-	Unit cost		Adjusted cost -	Billing rate m	Billing rat	Markup	-	Adjusted billabl =	Unit rate driver	= Pricing item type =
		Cost item pricing						\$ 5,000.0000		\$ 0.0000	\$ 83	8.0000	\$ 5,838.0000		
Lai	bor							\$ 5,000.0000		\$ 0.0000		\$ 0.0000	\$ 5,000.0000		
(New		0.0000		\$ 5,000.0000	\$ 5,000.0000	0.0000%	\$ 0.0000			\$ 5,000.0000	Manual	Cost item
G	rand	total									\$	38.0000	\$ 5,000.0000		
		GT level 0 (Grand Total cost item pricing 10.0000%) - Level 0									s	00.0000	\$ 500.0000		Markup
- (GT (Grand Total cost item pricing \$) - Level 0									s	60.0000	\$ 60.0000		Markup
- (GT Level 1 (Grand Total cost item pricing 5.0000%) - Level 1									s	78.0000	\$ 278.0000		Markup
				1											

Cost item markups are carried over to the pricing summary. The cost item markups are shown above the subtotal line and are included in the pricing summary subtotal.

	COST	Dining markup	Markup	Markup %		Deductions	Net value	Issue status		Pricing status		Propose	il status	
33.14462	\$ 2,796.254325	\$ 0.000000	\$ 2,736.890296	97.87701	6113%	\$ 0.000000	\$ 5,533.144621	New	•	None		• None		
15 -	+%			DETAILS	PRICING	SUPPORTING DOCUMENTS					Σ	=	🗊 🗊	C
						_							Cancel	s
Pricit	ng summary		ROM		Estimate		Proposal	Agree				Contributed v	alue	
^ I	Direct cost total												\$ 5,3	333.144
	Labor												\$	4,773.78
	'ype labor name										\otimes			\$ 0.00
						\$ 2,336.890296							\$	2,336.89
- M1. ((Labor cost item pricing \$) - Level 0												s	2,336.89
Labo	or value markup (Labor cost item pricing \$) - Le	evel 0												\$ 100.00
Labo	or subtotal												\$	4,773.78
<u>۰</u>	Equipment													\$ 559.30
	ype equipment name										\otimes			\$ 0.00
						\$ 459.364029								\$ 459.38
Foui	ipment value markup (Equipment cost item pric	ing \$) - Level 0												\$ 100.00
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After you convert the issue to a potential change order or client change order, both the cost item markup and the pricing summary markup are shown above the subtotal in the potential change order or client change order.

ADD A PERCENTAGE-BASED MARKUP TO A COST ITEM

Summary: Add a percentage markup when you want to mark up cost items based on their values.

Considerations: Percentage markups are only calculated when a cost item has a value.

Quick steps:

1. From the Cost item pricing page, click **Add markups**, and then select **Markup percentage**. The Add markup dialog box opens.

Actions	• • 🖄 😣		÷* +% =			DETAILS	PRICING	SUPPORTING DOCUMENTS	
	Cost item description =	WBS phase code 👘	Pay item 📼	Add markup					
	Cost item pricing			< Back to availa	able markups				
Labor									
	Test Case 2269178	1350		+Manual markup	o name •Marku	p percentage	 Applied to section 		*Markup level
				Enter markup	name	Enter percentage	Labor	•	Level 0
				Selected markup	DS			Cancel	Add to selected markups
									Ŧ
									Cancel Add

- Select an available markup, or click Add manual markups to add a new one. When you add a new markup, a slide-out panel opens in the Add markup dialog box that lets you add a markup name and percentage. The markup percentage can include up to three digits before the decimal. You can then select the section to which it is applied and the markup level, if applicable. Click Add to selected markups to add the markup.
- 3. Click **Add**. The markup is shown in the grid on its own line.

ADD A VALUE MARKUP TO A COST ITEM

Summary: Add a value markup to a cost item when you want the markup to be a set amount and not based on the values of the cost items in that section.

Considerations: Because the value markup is a set amount, it is added to the cost item section regardless of the value of the cost category. Value markups are always level 0.

Quick steps:

1. From the Cost item pricing page, click **Add markups**, and then select **Markup value**. The Add markup dialog box opens.

Enter the markup name, the value of the markup, and the section it applies to. The markup level is set to Level 0 and cannot be changed.

	Cost item description	WBS phase 😇	Pay item	Add markup					
	Cost item pricing			*Manual markup name	*Markup value	*Applied to section		Markup level	
Labor					¢ 0.000000	Select one	•	Level 0	*
	Torch CMP Metal @ Pier Caps (Install b	1016			3 0.00000				
	GB/PC - Bulkhead,R&B Templates - La	1015				_			
	M1 (Labor cost item pricing \$) - Level 0					(Cancel	Add to selected markup	ps
Equipme	ent								
	ST&S and Materials	1003 - 800		Selected markups					
	Grade Beams/Pier Caps Excavate / Fin	1006 - abc							^
Gran	d total								
									Ŧ

- 2. Click Add to selected markups.
- 3. Optionally, repeat steps 2 and 3 if you want to add additional value markups.
- 4. Click **Add** to add the markups to cost item pricing. The markup is shown in the grid on its own line.

You can also add markups at different calculation levels to the grand total. See <u>Markup calculation</u> <u>levels</u> for more information.

4.30 COST ITEM PRICING TEMPLATES

4.30.1 COST ITEM PRICING TEMPLATES

When you have large projects with many cost items, or if you have a group of cost items that you use on a regular basis, you can create a cost item pricing template to quickly add cost items to cost item pricing. After you add an existing cost item, the Manage templates icon is enabled.

Templates are not specific to an issue. You can manage templates from any issue and reuse them.

4.30 STEP BY STEP 1 – CREATE A COST ITEM PRICING TEMPLATE FROM THE REGISTER

Create a cost item template, so you can quickly add frequently used cost items when pricing an issue.

Only existing cost items can be saved as a template.

- 1. From the Cost item pricing page, add an existing cost item.
- 2. Click the **Manage templates** icon, and then select Create template. The Create as template dialog box opens.

\$4	0,703,8	aue 27.12	\$40,092,66	9.00	\$2.00	\$611,1	56.12	1.52°	jin L % \$	6.00
A	ctions 🗨	• 🕑 📝		🔳 🕞 Manage	e templates			DETAILS	PRICING	SUPPORTING DOCUMENTS
»		Cost item description	- WBS phase	Create	template	Adjusted CB Qty	UoM		Adjusted MHrs 📃	MHrs/Unit
		Cost item pricing							0.00	
_	Labor								0.00	
-		Builder's Risk Insurance	ce 1003		Labor	8.00	Each		0.00	0.
	Deduction	s (i)							0.00	
5		Validation- Material	1115		Deductions	6.00	Each		0.00	0.0
pricin										
item										
ost										

3. Enter the name of the template, and then select a value from the Sharing field drop-down list to indicate whether the template is private or shared.

Create as templa	ite	
\land New cost item wil	ll not be saved in templa	te
Template name		
Sharing		
Sharing Private template		•
Sharing Private template		•

4. Click **Save**. Change validates to ensure that the template name and shared value is unique. The existing cost item dialog box opens. You can then select and group cost items.

The template can now be used to add cost items when pricing an issue.

4.30 STEP BY STEP 2 – CREATE A COST ITEM TEMPLATE WHEN ADDING COST ITEMS

You can create a template as you add cost items to cost item pricing.

Only existing cost items can be saved as a template.

- 1. From the Cost item pricing page, click the **Add cost item pricing** button or right-click anywhere in the grid, and then select **Add existing cost items**. The Add cost item pricing dialog box opens.
- 2. Select one or more cost items, and then group them.
- 3. Click the **Create template** button. The Create as template dialog box opens.

Se	ect cost item	IS			Select cost pricing						
					Q	Θ	ि ि Group cost pri	cing	Q		
	CBS posit 😑	Description -	WBS	Account codes			Description	WBS phase code	Cos		
	<u>^ 1</u>	Financial Res	1000		-	Labor					
	∧ 1.1	Billable	1111				Validation- Labor	1116	Lab		
	∧ 1	Validation/Pre	1145				Validation- Material	1115	Lab		
	~	Indirects & Ge	1001			Vender					
		10 - Commerc	1002			Venuor					
÷		Builder's Risk	1003 •	10.39.04			Builder's Risk Insurance	1003	Ven		
Ð		Validation- M	1115 •	10.39.04		4			•		
\oplus		Validation- La	1116	30.03.24.002.03							
		20 - Job Relat	1007			Selected :	3				

4. Add the template name and indicate whether the template is private or shared.

* lemplate name	
Sharing	
Private template	•

- 5. Click **Save**. Change creates the template, but the items are not added to the grid.
- 6. Click **Add** in the Add cost item pricing dialog box to add the items to the grid.

The template can now be used to add cost items when pricing an issue.

4.30 STEP BY STEP 3 – ADD COST ITEMS FROM A TEMPLATE

You can use a template to quickly add cost items when pricing an issue.

- 1. From the Cost item pricing page, click the **Manage cost item templates** icon, and then select Manage templates. The Manage templates dialog box opens.
- 2. Select a template, and then click **Open template**. The Add cost items dialog box opens.
- 3. Optionally add or remove items from the Select cost pricing list.
- 4. Click **Add** to add the items to the cost item pricing grid.

4.30.1.1 MANAGE TEMPLATES

To manage a template, click the Manage cost item templates icon and then select Manage templates.

	Current v \$40,703,	alue 827.12	Cost \$40,092,669.00	Billing markup \$2.00	Markup \$611,15	56.12	Marg 1.52%	in D % \$	Deductions 6.00
	Actions	• 🕀 🗹	⊗ ि III	nage templates ate template			DETAILS	PRICING	SUPPORTING DOCUMENTS
>>	>	Cost item description	WBS phase code	Cost pricing	Adjusted CB Qty	UoM		Adjusted MHrs 📃	MHrs/Unit -
		Cost item pricing						0.00	
	Labor							0.00	
		Builder's Risk Insuran	ce 1003	Labor	8.00	Each		0.00	0.00
	Deductio	ns 🛈						0.00	
		Validation- Material	1115	Deductions	6.00	Each		0.00	0.00
Cost item pricing									

The Manage templates dialog box opens where you can add, edit, delete, and copy templates and send a copy of a private template to another user.

	Template name	Access	Created by	Created date	Modified by	Modified date			
		Private template		10/11/2022	10000	10/11/2022			
		Private template		10/13/2022		10/13/2022			
		Private template	1000	10/13/2022		10/13/2022			

NOTE You must have the Edit shared template permission to edit a shared template and the Delete shared template permission to delete a shared template.

When you edit a template, you can only edit one template at a time. If you edit a shared template that you did not create, you must create a new template with a unique name and then save it. You can delete multiple templates at a time. When you delete a shared template, you delete it for all users.

You can copy a template and save it with a unique name.

You can send a copy of a template to another user.

4.30 STEP BY STEP 4 – SEND A COPY OF A TEMPLATE

If you have a template you want to share with another user without making it a shared template for all to use, you can send a copy.

- From the Cost item pricing page, click the Manage cost item templates icon, and then select Manage templates. The Manage templates dialog box opens.
- 2. Select a template, and then click **the Send a copy** icon. The Send copy of template dialog box opens.
- 3. Enter the name of one or more users, and then click **Send**. The recipients receive a notification in the Notifications area. When they click on the notification, they are taken to the issue log where they can save the template.

4.31 COPY A COST ITEM

You can copy a new or existing cost item, so you do not have to start over when adding a similar item. You can select **Copy** from the context menu or click the **Copy** icon in the toolbar.

You can select a new or existing cost item to copy. Only one cost item can be copied at a time. If you have selected more than one cost item, the Copy cost item option in the context menu is disabled. You cannot copy a copied cost item until it is saved. The copied cost item remains on the register when you click **Save**.

Every copy is treated as a new cost item; therefore, a WBS phase code is not added because it is not yet in InEight Control. The phase code stays blank until the CCO is executed and the contract adjustment is approved.

4.32 EDIT COST ITEMS

If you want to add more detail for a cost item, select the item, and then click the **Edit cost pricing summary** icon. The Edit slide-out panel includes tabs for details, cost categories, and resources.

The Details tab shows the adjusted quantity, cost, and man-hours for the cost item. The Details tab also lets you view pay item information for existing cost items. The Cost categories tab shows the adjusted cost distributed across the cost categories. You can see the adjusted cost, billing rate markup, billing amount, current budget, and current estimate. The Resources tab shows resources assigned to that cost item in Control.

			mus prase cooe	cost pricing	Adjusted CB Qty 👘	UoM	 Adjusted MHrs 	The Mers	Ullei 1140							
		Cost item pricing						57.38	Install UG SB Pipe	Cs						
	Labor							6.40	DETAILS	RESOURCES					O Get	t cost item
()	•	Install UG SB Pipe Cs	1140	Labor	10.00	U		6.40	-							
	Mater	ials						50.98	Cost item detai	ls						~
		UG Pipe Testing - Pneu	2717	Materials	100.00	UF		8.99	Adjusted Qty	UoM		Adjusted	post	Cost source		
		UG Pipe External Coati	1169	Materials	200.00	UF		41.99	10.00	UF		501.88		Plug		
									Resources							~
									Bew#	Code	Description	Quantity	UeM	Work hours	CE unit cost	
									0 1	1.0.40.1.01	Pipe General	0.30		124.90	\$87.67	
									2	1.0.40.1.00	Pipe Journey.	4.00		1,665.32	\$77.38	
												<				
									Productivity an	d overall settings						~
											т	otal				
									Hours		Units/Hour			Hours/Unit		_
									416.33		9.05			0.11		
									Man bours		Units/Man bo			Man bourn (I loit		
	0	Labor L	Cost Res provid Lake Instant 15 Bray Ca Mathieu 10 Provi Cases 10 Provi Cases 10 Provi Cases	Cell time pricing Lake Cell time and US Dirps Cell Manual US Dirps Cell US Prior Tomos - Prins. 0 07 Prior Tomos - Tomos 110	Construction Construction Construction Non-Office Like Mathematical State of the State of the State 207 Mathematical Image: State of the	Colspan="2">Colspan="2"Colspan=	Lake Lake 100 Lake 100 100 Lake 100	Lake 100 (F Control Control <thcontrol< th=""> <thcontrol< th=""> <thcontr< td=""><td>Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4"Colspan="4">Colspan="4"Colspan="4">Colspan="4"Colspan="4"Colspan="4">Colspan="4"Colspan="4"Colspan="4">Colspan="4"Colspan="4"Colspan="4"Colspan="4"Colspan="4"Colspan="4">Colspan="4"">"></td><td>Low 27.3 Control to the promy 27.3 Control to the promy Conthe promy Control to the promy</td><td>Low 27.34 Bitto U.S arefug Editor U.S arefug<td>Cost there proved Carton Carton</td><td>Cost data proof STA Cost data proof STA Cost data proof Cost data proo Cost data proo Cos</td><td>Continue room Continue room Contin room Continue room Continue r</td><td>Control control period Control <th< td=""><td>Content promy Status St</td></th<></td></td></thcontr<></thcontrol<></thcontrol<>	Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4">Colspan="4"Colspan="4">Colspan="4"Colspan="4">Colspan="4"Colspan="4"Colspan="4">Colspan="4"Colspan="4"Colspan="4">Colspan="4"Colspan="4"Colspan="4"Colspan="4"Colspan="4"Colspan="4">Colspan="4"">">	Low 27.3 Control to the promy 27.3 Control to the promy Conthe promy Control to the promy	Low 27.34 Bitto U.S arefug Editor U.S arefug <td>Cost there proved Carton Carton</td> <td>Cost data proof STA Cost data proof STA Cost data proof Cost data proo Cost data proo Cos</td> <td>Continue room Continue room Contin room Continue room Continue r</td> <td>Control control period Control <th< td=""><td>Content promy Status St</td></th<></td>	Cost there proved Carton Carton	Cost data proof STA Cost data proof STA Cost data proof Cost data proo Cost data proo Cos	Continue room Contin room Continue room Continue r	Control control period Control period <th< td=""><td>Content promy Status St</td></th<>	Content promy Status St

4.32.1 PLUG ITEMS

When the cost source is Plug, you can edit the following fields:

- Adjusted cost
- Unit cost
- Adjusted Mhrs
- Mhrs/Unit
- Unit/Mhr
- Labor cost/Mhr

These fields can be edited only in the Edit cost item slide-out panel. You can edit the Adjusted CB Qty value from the Cost item pricing register.

The fields work interactively. If you change the value of a field, Change calculates the values of the related fields. When you update the adjusted cost and there is a value in the Labor cost category, Change lets you select the Labor cost/Mhr or the Adjusted Mhrs field to be recalculated. When you update the unit cost, Change calculates the adjusted cost, and then spreads the cost across all cost categories.

If no quantity has been entered, you can enter an adjusted cost. The Mhrs, Mhrs/Unit, and Unit/Mhr fields are disabled. After you enter an Adjusted CB Qty, all fields are enabled. Adjusting the man-hours maintains the Labor cost/Mhr from Control to calculate the overall adjusted cost. After you make a change, the Unit rate driver field changes to Manual. The manual changes are saved as an additional unit rate driver when they are applied and saved to the register.

Initially, the cost item has a unit rate driver value of Current Budget, and you are prompted to enter the Adjusted CB Qty. Afterwards, the adjusted cost uses the productivity rates to calculate the details
and Cost Categories tab. Adjusted MHrs, MHrs/Unit, Unit/MHr, and Labor cost/Mhr are used to calculate the total Labor cost category.

The Cost categories tab in the Cost-item slide-out panel shows the assigned cost category assigned to the plug cost item. The adjusted cost is placed into a cost category based on the cost pricing selected. For example, when Cost pricing is Materials, the adjusted cost is shown in the cost category of Materials. You can manually distribute costs across individual cost categories. All cost categories are added together into a Total adjusted cost for the cost item. The name of each Cost category shown in the tab can be modified using custom labels. When you update the Labor cost category, a dialog box prompts you to choose to proportionally adjust the Labor cost/Mhr or the Adjusted MHrs value.

On the Resources tab, you can add or remove resources, but they do not affect calculations.

When the CCO is executed, Control consumes the updated quantity, cost, and man-hours in the Contract adjustment.

4.32.2 DETAIL ITEMS

When the cost source is detail, you can edit resources in the Resources section. Each resource has a Cost driver of *Fixed*, *CI Duration*, or *CI Qty* as in Control. Cost driver and resource type determine which fields are editable for any given resource. For example, when the resource has a Cost driver of *CI Duration* exists, the Productivity and overall settings fields becomes editable.

Initially, the cost item has a unit rate driver value of Current budget, and you are prompted to enter an Adjusted CB Qty. After that, the adjusted cost uses the productivity rates, based on the value of the unit rate driver to calculate the values on the Details and Cost categories tabs. The Current budget and Current estimate have their own Productivity rates for Unit cost, Adjusted MHrs, MHrs/Unit, Unit/MHr, and Labor cost/Mhr, and cost category breakdown.

- If the unit rate driver is set to Current Budget, only the Adjusted Qty is used to recalculate productivity rates and cost category breakdown for the current budget.
- If the unit rate driver is set to Current Estimate, only the Adjusted Qty can be used to recalculate Productivity rates and cost category breakdown for the current estimate.

If you add, edit, or delete a resource on an existing Detail cost item, the value of the Unit rate driver field changes to *Manual* to indicate that this cost item is no longer using current estimate resources from Control. The option to return to the Current Estimate value becomes unavailable. The only way to go back to the current estimate is to delete the cost item, and then add it again. Added resources are indicated by a yellow circle to the left of the row number. Deleted resources show with strike-through text. When a Contract adjustment is executed, Control does not consume any resource changes on the existing cost items. This functionality is meant for estimating changes only.

Cost item details Adjusted Qty UoM Adjusted cost Cost source	^
Adjusted Qty UoM Adjusted cost Cost source	
10.00 PLS \$48,894.67 Detail	•
Resources	^
Row# Code Description Quantity UoM Work hours C E-unit	cost
Image: 1 Resource A (L Labor resource 5.00 Hour 41.67 41.67	\$93.14
D 2 Resource B (E Construction 5.00 Hour 50.00 \$	890.00
3 Resource C (I Installed equi 5.00 Each 10.00 \$	370.00
• 4 1.C.01.1.01 GF - Laborer 1.00 Each 8.33	\$61.67

After you change a value in the Resources section, a blue dot is shown to indicate that someone has changed the value of the resource in Change. If you make changes to the Productivity and overall settings section, a yellow indicator shows the last field that was updated. If the update to the Productivity and overall settings affects resources, the blue dot is shown in resources.

When you undo a resource change, a dialog box prompts if you are sure you want to undo your changes. If you select *Yes*, the changes are removed, and Change recalculates the cost item. For example, if you remove an existing resource and then you undo the removal, the strike-through text is no longer shown.

Any manual change on the Resources tab (Resources or Productivity and overall settings sections) changes the Unit rate driver to *Manual*. When the Unit rate driver is *Manual*, the cost item uses the Resources tab to recalculate the cost item.

Each resource has costs distributed across the different cost categories that are shown in the Cost categories tab. For Detail cost items, the Cost category tab is read-only.

4.33 COST ITEM SYNC

Change takes a snapshot of the cost item from Control at the time it is added. Any updates made to the cost item in Control are not automatically reflected in the pricing. This is to ensure pricing is not changed without the Change user knowing or completing an action. If you want to update cost items from Control, you can sync each cost item individually or in groups.

To sync an individual cost item, click the **Edit** icon, and then click **Get cost item** in the slide-out panel. The cost item is updated with any changes made in Control. Updates are also reflected in the Issue log.

urrent value		Cos	t	Billing markup	Markup	Margin	Ded	uctions	Net value	Issue status		Pricing status			Proposa	status		
2,356.06		\$1,9	936.37	\$115.70	\$304.00	21.67%	\$0.0	00	\$2,356.06	Executed	~	None		Ŧ	None		-	
Actions 🔻 🕣	Ľ		8			DETAILS	PRICING	SUPPORTINI	G PRICING & S PROPOSAL		포이	ear all filters	Σ	=	3	t≡	D	
																Cancel	Save	
	«		Cost item description	🐺 WBS phase code 👘	Cost pricing	Adjusted CB Qty 👘	UoM	👳 Adjusted MHr	1018									
ing summary			Cost item pricing						Haul - To Stockpile-EB									
and the second		Labor							DETAILS RESOU	ACES						🗘 Get o	ost item	
st item pricing	U		Haul - To Stockpile-EE	8 1018	Labor	100.00	SY		Forecast (T/O) Qty	UoM		CB Qty		Las	t synced o	1		
	8	Equipm	nent						56,619.00	SY		56,819.06		06/9	01/2021 0	1:23:33 AM		
			Load At Stockpile - Co.	. 1013	Equipment	200.00	CY		Description				c	ost source				
		Time re	Haud - To Stockoile 1	ted overhead			200.00			Haul - To Stockpile-EB			Plug					
		Fixed in	ndirect cost	1010	Time related overhead	300.00	01		Adjusted CB Qty	UoM			c	ost pricing				
			Excavator Exc. Load Or	1009	Fixed indirect cost	400.00	CY		100.00	SY				Labor			•	
									Adjusted cost	Unit cost				Init rate dri	ver			
									\$73.87	\$0.74				Current Br	adget		•	
									Adjusted MHrs	MHrs/Un	it		U	/nit/MHr				

To sync multiple items, go to Actions > Sync > **Get cost items**. The Get cost item dialog box shows a list of cost items that have changed in Control since they were originally added to the Cost item pricing page. This dialog box shows before and after comparisons based on the current unit rate driver.

Up	dated cost items								
	Description	WBS phase 😇	MHrs/Unit v., 🛒	MHrs/Unit v \Xi	Unit/MHr va 🚎	Unit/MHr va 😇	Unit cost va \Xi	Unit cost va 😇	Q Unit rate dri \Xi
	Haul - To Stockpile-EB	1018	0.01	0.01	100.03	94.83	\$0.74	\$0.76	Current Budget
	Load At Stockpile - Common Top	1013	0.04	0.04	22.54	22.54	\$3.17	\$3.16	Current Budget
	Haul - To Stockpile_1_ed	1010	0.02	0.02	49.38	49.38	\$1.06	\$1.14	Current Budget

NOTE Not all fields show in this dialog box as fields that have been modified. For example, if current estimate rates have been updated in Control, and you are using the current budget rates for your pricing, the changed fields would not be listed.

The Synced date column on the cost item pricing grid shows when information was pulled from Control.

4.34 MARKUP CALCULATION LEVELS

When you want a markup in the Grand total section of the pricing summary or cost item pricing to consider previous markups, you can add markups at different calculation levels. Change adds the value of lower-level markups to the grand total to calculate the next level markup.

Markups can be set at levels 0 through 4. Level 0 is considered the root level. The markups are based on the grand total in a cost item or grand subtotal in the pricing summary and show below those lines. Markups to other sections are also considered level 0. Markups for subsequent levels are calculated from the subtotal plus markups from lower levels. For example, if markups in cost item pricing are 1% for levels 0, 2 and 4; 2% for level 1; and 5% for level 3, and the grand total is \$1000, Change calculates the values as follows:

- Level 0: \$1000 x 1% = \$10
- Level 1: \$1010 x 2% = 20.20
- level 2: 1030.20 x 1% = 10.302
- level 3: 1040.502 x 5% = 52.025
- level 4: 1092.527 x 1% = 10.925

The total markups to the grand total in cost item pricing is 103.452.

The various markups from cost item pricing are shown in the grand subtotal in the pricing summary. When multiple markup levels are added to the grand total in the pricing summary, they show under the grand total. Markup levels can be added to the pricing summary at the issue, PCO, and CCO levels. The following image shows the Pricing summary page with the markup levels from the above example and two levels of markups added from the pricing summary.

Act	ions 🔻	• • • • •		+% ==		D	ETAILS PRICI	IG SUPPOR DOCUM	TING NTS	Ξ c	Σ	≡ ₿	\$≡	C7	(B,
													(Cancel	Save	
»		Cost item description 👘 W	/BS phase code 📃	UoM T	Adjusted MHrs 👳	MHrs/Unit 📃	Unit/MHr -	Unit cost	\Xi Adjusted cost 📃	Markup	-	Adjusted billab	I	Unit rate drive	r 👻	
		Cost item pricing			1,000.000				\$ 1,000.000	\$ 10	3.452	\$ 1,10	3.452			
	Labor				1,000.000				\$ 1,000.000	() () () () () () () () () ()	\$ 0.000	\$ 1,0	00.000			
		Cost item with value \$1000 N	lew	000 Each	1,000.000	1,000.000	0.001	\$ 1,00	.000 \$ 1,000.000			\$ 1,0	00.000	Manual		
	Grand	total								\$ 1	03.452	\$ 1,000	.000			l
		Markup level 0 (Grand Total co								s	10.000	\$	10.000			
		Markup level 1 (Grand Total co								s	20.200	\$	20.200			
		Markup level 2 (Grand Total co								\$	10.302	\$	10.302			
0.91.10		markup level 3 (Grand Total co								\$	52.025	\$	52.025			
5		markup level 4 (Grand Total co								s	10.925	\$	10.925			

4.35 BUDGET MOVES

When you have issues that are not going to result in client change orders, you can now initiate a budget move in InEight Control directly from the issue, so the value can be moved to another part of the budget.

4.35.1 INITIATE A BUDGET MOVE

A budget move from Change creates a contract adjustment in Control. When the Control user creates a budget move, the attributes that were set up in Change flow into Control.

To create a budget move from an issue, click the Actions menu, and then select Submit budget move.

change management > is	sue
Current value \$5,841.64	Cost \$15,831.64
Actions 🔺 🙏 🛔	di G
Update values	•
Create budget move	
View as built totals summary Generate change document	185 - deta
Create document	•

In a budget move, an issue is limited to 250 unique cost items or 100 unique pay items. If a message shows indicating that you must remove cost items or pay items, it is best practice to create a new issue. Creating a new issue lets you create another budget move with the removed cost items and pay items.

A budget move is sent to Control with a *Draft* status. After the budget move is sent to Control, the issue is given a status of *Budget move*. You cannot associate the issue to a PCO or CCO, and the Pricing

tab is disabled. The Control user can review, revise, or delete the budget move. If you make a budget move that is not zero, the Control user can zero out the budget move.

You can track the budget move from the Control budget change section in the Additional details section of the Issue details.

Control budget change 🛛 🧕		^
Control budget status	Control change register ID	
	199.0	

The heading of the Control budget change section shows the Control icon representing the budget move status. The budget move in Control can have one of the following statuses: *Approved*, *Draft*, *Revised*, or *Rejected*.

Control budget change 🖉	~

4.35.2 BUDGET MOVE WORKFLOW

If workflow is configured for the budget move, the budget move must be approved in Change before it can be sent to Control. The workflow begins after you select **Submit budget move** from the Actions menu. The Start approval dialog box opens, where you can add a message or attach supporting documents before starting the workflow.

After the workflow has begun, the issue is locked, and no edits can be made while the budget move is pending approval. If the budget move is recalled or rejected, the issue is enabled for editing.

4.35.3 REVISE A BUDGET MOVE

If circumstances change, and you need to edit the issue, you can revise the budget move. To revise the budget move, click the **Actions** menu, and then select **Revise budget move**.

\$0.00	\$0.00
Actions 🔺 🙏	joj 🕞
Update values	•
Revise budget move	
View as built totals sum	mary
Generate change docum	ent ZIU - det
Create document	¢ >
Create Task	
	BM rejected

The status in the Control budget change section changes to *Revised*. You can then make changes to the pricing or associate the issue to a PCO or CCO.

4.36 TASK CREATION IN INEIGHT COMPLIANCE

When you have tasks associated with an issue, PCO, or CCO, you can create them in InEight Compliance to take advantage of Compliance's task management features. The task is created in Compliance and is completed in the issue, PCO, or CCO.

4.36.1 COMPLIANCE INTEGRATION

Before you can create tasks for Change in Compliance, you must ensure that Compliance task templates are in place and permissions are set up for you in Compliance.

4.36.1.1 PERMISSIONS

You must have permissions to create task in Compliance. Permissions for Change users who are allowed to create tasks include access to the following:

- The project or organization
- The category for the template the organization uses
- The reporter role for creating and editing tasks

4.36.1.2 COMPLIANCE TASK TEMPLATE

The task you create in Change follows the default task template. An administrator can create a task template in Compliance. The template must have the following:

- Task title
- Change ID
- Description
- Task person
- Due date
- Assign button
- Notes
- Complete button
- Cancel button

The template must be published before it can be used in Change. Refer to the <u>Compliance</u> <u>documentation</u> for information about how to set up a standard task template.

The template must then be selected in the organization settings (organization Settings > Change > Configurations > **Task type setup**). The selected template is used for all projects in the organization.

4.36.2 CREATE A TASK

You can create a task from the Details page of an issue, PCO, or CCO.

4.36 STEP BY STEP 1 – CREATE A TASK

Create a task in an issue, PCO, or CCO when you have task items that you want to follow up.

A task template must be in place, and you must have permission to create tasks in Compliance.

1. From the Details page of an issue, PCO, or CCO, expand the Actions menu, and then select **Create Task**. The template opens in Compliance in a new window.

Task details				
* Task title		Change ID ①		
	(250 characters remaining)		(250 characte	rs remaining)
Description				
			(4000 characte	rs remaining)
* Task person		* Due date		
select one	*	1 Schedule		
Assign				
Notes				
			(4000 character	s remaining)

2. Enter information in the required fields, and then click **Assign**. The Task log in compliance opens, and you can see your task in the list.

The task person completes the task, and then clicks Complete. You can track the task progress in the task log and on the Details page where you originated the task.

4.36.3 TASK LOG

After work has begun on a task, it becomes available on the Change Task log. The Task log (Change > **Task log**) shows the tasks assigned to the project. A red circle icon indicates the number of tasks in the project that are pending, scheduled, or overdue.

		NEW ISSU	JE 💿 ISSUE LOG	PC	CCO LOG CCO LO	G TAS8	LOG (315)	ACTION ITEMS	AUDIT LOG							Vie	V All tasks	-
ľ															😇 Clea	ar all filters	ΣΒ	2= C
	Туре	÷	ID	Ŧ	Name	$\overline{\tau}$	Task title	Ŧ	Task person	Ŧ	Start date	Ŧ	Due date	÷	Completed date		State	
	Issue		197		ASD.		Task 1		Esteban Conforte		12/26/2021		12/29/2021				Complete	
	PCO		New PCO		New.		Task 2		Esteban Conforte		12/26/2021		01/03/2022				Canceled	
	Issue		191		<u>A</u> .		Task 4		Marianne Crane INEIGHT				01/04/2022				Scheduled	
	CC0		CCO test		Error handling.		Task 3		Esteban Conforte				01/05/2022				Scheduled	
	PCO		DCT PCO.		DCT PCO.		Task 5		Marianne Crane INEIGHT		12/26/2021		01/06/2022				Overdue	
	Issue		191		A.		testing.		Karen Loftus				01/19/2022				Scheduled	

The task log shows all tasks that have been assigned on the project. The View drop-down menu in the upper right of the page lets you change the view to show your tasks only. You can also change the row density.

Values in the ID column are links to the originating issue, PCO, or CCO. The Task title is a link to the task in Compliance. The Due date and State columns highlight tasks that are past due in red. The Name column contains the Name of the issue, PCO, or CCO.

You can click the Export icon to export the tasks to a Microsoft Excel spreadsheet.

You also can view tasks from the issue, PCO, or CCO in the Task section of Additional details. See the Additional details for issues, PCOs, and CCOs for more information about the Tasks section.

CHAPTER 5 – CHANGE ORDERS

Features in Change help you create and manage potential change orders and client change orders.

5.1 INEIGHT CONTRACT WORKFLOW -CHANGE ORDERS



5.2 POTENTIAL CHANGE ORDER (PCO)

5.2.1 OVERVIEW

During the process of managing changes, some of your issues will require additional work for either you or your subcontractors to perform. As you seek compensation from the client (owner) for issues that require additional work, you will convert those issues into Potential Change Orders (PCOs), as indicated in the below workflow.



The table below further defines each step of the change management process.

Term	Description
Issue	 Something that happens on the project that could incur costs or impact the schedule. Provides a way to track issues that may or may not become a contract change (PCO or CCO) You can track how many issues occurred on the project, what their impact was, and how many were recovered via change orders

Term	Description
Potential Change Order (PCO)	 A potential change to the owner's contract that you are pricing and getting ready to negotiate with the owner. A PCO may contain one or more issues A PCO may go through several changes during the negotiation with the owner You can track PCOs to see the potential effects on your budget and revenue
Client Change Order (CCO)	A finalized change you are ready to send to the owner.You can bundle multiple PCOs together to become one CCO

5.2.2 POTENTIAL CHANGE ORDER (PCO) CREATION

A PCO is generated from one or more issues that already exist within the issue log. The PCO will carry over all pertinent data from the Issue and populate the fields within the PCO. The link between Issue and PCO is one-way, upstream. Data carried over from the Issue into the PCO can be modified without any changes occurring to the original data, however, changes to the Issue can be pushed upstream to the PCO.

Any changes made to PCO pricing does not update the original issue. If an issue needs to be updated, you will need to open the issue and update it.

The following steps walk you through how to convert an issue to a PCO.

5.2 STEP BY STEP 1 – CREATE A POTENTIAL CHANGE ORDER (PCO)

Summary: Create a PCO when you are ready to negotiate the issue with the owner.

Considerations: These steps start from the Issue log. You can also create a PCO from the Change orders section of the issue Details page. If your contract is already negotiated with the owner, you can convert an issue directly to a CCO and skip the PCO process altogether.

When converting to a change order, an issue is limited to 250 unique cost items or 100 unique pay items. If a message shows indicating that you must remove cost items or pay items, it is best practice to create a new issue. Creating a new issue lets you create another change order with the removed cost items and pay items.

Quick steps:

NOTE

1. From the Issue log, select the issues you want to convert to a PCO.

Actions	•	\oplus	\otimes	ß	\vdash	\$ jeji G
	Issue ID		PCO ID		CCO ID	Issue name 🛒
	<u>62</u>					Inc. of Concession, Name
	<u>61</u>					
	<u>60</u>		<u>PCO - 20</u>			

2. Click the Associate to change order icon, and then select Assign to potential change order.

Actions	•	\oplus	\otimes	G	\vdash	*		3	
	Issue ID		PCO ID		CCO ID	÷.	Associate to	Potential change order	lesue stat
	<u>62</u>								New
	<u>61</u>					1		07/18/2024	New

NOTE If any of the issues you selected are already part of a PCO or CCO, you will receive an error message. You can check the Issue Status column in the Issue Log to ensure the selected issues have a status other than PCO or CCO.

The Assign to potential change order dialog box shows.

3. Indicate whether the issue is to be associated to a new or existing PCO, and then enter the PCO ID and PCO name. You can also enter an alternate PCO ID and a description of the change.

5					
*PC0 ID		Alternate	PCO ID		
		Hint: Type	e new or existi	ng Alternate I	PCO ID
*PCO name					
cost item HVT					
Description of change					
Format • B I	<u>U</u> ≣	=	≣ ∷	1= +1	ŧ

4. Click **Save**. The PCO Details page opens.

	DETAILS	PRICING & PROPOSAL	SUPPORTING DOCUMENTS	PROPOSAL & PRICING
PCO Details Created by: paul trippi on 06/21/2019				Change orders
*PCO ID	A	lternate ID		🛐 Convert to client change or
PT001				
	H	lint: Type new or existing Al	ternate ID	
*PCO description			981	
Bearing Pads Rework			*	
, , , , , , , , , , , , , , , , , , ,				

- 5. Optionally, scroll to the Associated issues section, and then add any additional issues you want to associate to the PCO.
- 6. Go back to Change > **PCO Log** to see the status of your newly created PCO.

5.2.2.1 ASSIGN A PCO FROM ISSUE RECORD

Another option for Assigning an issue to a potential change order is on the Details tab of an issue record. Clicking the Assign to potential change order link will open the window to assign the issue to a PCO.

		Change orders
*lssue start date		覧 Assign to potential change order
06/13/2019	曲	🔄 Convert to client change order
Hint: Date of the start of impact	1000	Split issue
	^	
	Ŧ	A Split issue

5.2.3 PCO HEADER

The header at the top of your PCO record contains the same functionality as the issue header, allowing you to update the following:

- PCO status
- Pricing status
- Proposal status

Current value	Cost	Markup	Margin	PCO status	Pricing status	us Proposal status	
\$0.00	\$0.00	\$0.00	0%	cco	✓ None	✓ None	•

As you change the statuses, you will be prompted to enter notes. These notes are stored in the Notes slide out panel, which you can access at any time by clicking on the View notes icon.

U	pdate PCO values with issue value	s Cancel	Save
	Notes for PB001 : B	learing Pads R	e ×
			*
	PCO created		
81	Nework using existing mate	enais, labor costs only	
05.00	You 09/20/2018 9:27 PM		
21.00			

5.3 PCO DETAILS TAB

Below the header on the PCO record, there are tabs for capturing the PCO's details, costs, and supporting documentation.

Current value	Cost	Billing markup	Markup	Markup %	Deductions	Net value	PCO status		Pricing status		Proposal status		
\$ 0.00000	\$ 0.00000	\$ 0.00000	\$ 0.00000	0.00000%	\$ 0.00000	\$ 0.00000	CCO	•	None	•	None		•
Actions 👻			[DETAILS PRICIN	G SUPPORTING DOCUMENTS	WORKFLOW ASSIGNMENTS					Σ	•	Ę
											Cancel	Sa	ive

The PCO Details tab contains the identifying information you entered on the Assign to potential change order window, along with a listing of the issues associated with the PCO, and the option to convert the PCO to a CCO.

Overview - PCO Details Tab

	Title	Description
1	PCO navigation	Lets you navigate to other PCOs without having to go back to the PCO log. Click the arrow to see a list of PCOs, and then select one. The selected PCO opens in the same window.
2	PCO ID	Free text entry field carried over from filling out the Assign to potential change order window.
3	PCO Name	Free text entry field carried over from filling out the Assign to potential change order window.
4	Alternate ID	Free text entry can be used as a subset to your PCO ID.
5	PCO start date	The date that work on the PCO started. You can use a start date that is different from the created date when the day work on a PCO was

Overview - PCO Details Tab (continued)

	Title	Description
		started is different from when the PCO was created. The PCO aging days open column on the PCO log uses the start date instead of the created date to give a more accurate count.
6	Description of change	Free text entry for describing the PCO, carried over from filling out the Assign to potential change order window. You can use the Expand icon to expand the text box for easy text entry and viewing. You can then collapse the text box when you are finished.
7	Change orders	Clicking this link converts the PCO to a Client Change Order (CCO).
8	Additional details	Sections for Schedule impact, Responsible parties, Correspondence, Request for information, Tasks, Revenue category, and Custom fields.
9	Associations	 List of issues that were associated to the PCO for creation Click the ID-Name link to go back to the issue Details screen Issue Details show the PCO ID for the issue the PCO is tied to Cost information is available in the Current value, Cost, Billing Markup, Markup, Markup %, Deductions, and Net value columns Click the Add associated issue icon to add additional issues to PCO if they are not assigned to an existing PCO or CCO You can also remove issues from the PCO from here
10	Potential change order terms	Terms specific to the PCO. You can add up to two terms. You can use the Expand icon to expand the term text boxes for easy text entry and viewing. You can then collapse the text boxes when you are finished.
11	eSign	Lists of eSign recipients and Project contacts that default as signees for an eSignature via a provider, such as DocuSign. When custom labels are used for contacts in InEight Platform project details, Change uses the labels in the Project contacts section. The labels are also used in the Send for signature dialog box.

00.0	Approval status	202	Associate to Chevil change order		
		-			
	Alternatic PCO-ID	A	Iditional details		
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5.3.0.1 ESIGN

The eSign section lets you view or add recipients to be used as default eSign signees. This section has subsections for eSign and Project contacts. All signees must be added to at least one section.

 Names in the eSign section are populated from the project eSign setup tab (Project settings > Change> Configurations > eSign setup). You can also manually enter the names of the signees. • Names in the Project contacts section are populated with contact information from project contacts set at the suite administration level. This section is for reference only. If you want to add or change recipients, you must edit the Project contacts section of the Project details.

5.3.1 ADDITIONAL DETAILS

The Additional details section has expandable subsections for the following features:

- Schedule impact
- Responsible parties
- Correspondence
- Request for information
- Tasks
- Revenue category
- Custom fields

5.3.1.2 SCHEDULE IMPACT

The Schedule impact section includes the requested time extension. When there is only one issue associated to the PCO, the issue delay days populates this field. When there is more than one issue associated, the field is blank. You can add forecasted days in the Forecast field.

5.3.1.3 CORRESPONDENCE

Use the Correspondence section to track the following:

- PCO Date client notified. An information icon in the Date column shows the specific supporting document that must be attached to populate the date. You can add the document on the Supporting documents page. After a document is added, a link is shown in the File/Link column.
- PCO Date price to client. An information icon in the Date column shows the specific supporting document that must be attached to populate the date. You can add the document on the Supporting documents page. After a document is added, a link is shown in the File/Link column.
- PCO Client approval date. You can enter a client approval date.
- Executed change order. An information icon in the Date column shows the specific supporting document that must be attached to populate the date. You can add the document on the Supporting documents page. After a document is added, a link is shown in the File/Link column.

5.3.1.4 REQUEST FOR INFORMATION

The Request for information fields are assigned by a supporting document of type RFI. The heading for the Request for Information section includes a counter so you can quickly see the number of associated RFIs the PCO has.

5.3.1.5 TASKS

The Tasks section shows all tasks assigned in InEight Compliance for the PCO. For each task, the section shows the task name with a link to the task, the name of the person assigned to the task, the due date, and the current state. Overdue tasks show in red in both the Due date and State columns. Pending tasks show in yellow in the State column. Completed tasks show in green in the State column.

5.3.1.6 CUSTOM FIELDS

Custom fields include PCO custom lists 1 and 2 and PCO custom fields 1-4.

5.4 PCO PRICING TAB

5.4.1 PCO PRICING TAB

The PCO Pricing tab continues the pricing management that began on the PCO's assigned issues. Therefore, when you first open the Pricing tab for a new PCO, you find it has inherited its issues' subtotal values, along with Associated Vendors and their referenced contract. This automatic inheritance of issue values only occurs upon creation of the PCO.

Current value	Cost	Markup	Margin	PCO status	Pricing status	Proposal status			
\$18,540.00	\$15,000.00	\$3,540.00	23.6%	New	• new 12 •	Accepted by client			
Actions 👻 (🕂 Ad	d markups		DE	TAILS PRICING	SUPPORTING WORKFLOW DOCUMENTS ASSIGNMENTS			$\Sigma \equiv \mathbb{P}$ t	: D <
								Cano	Save
Pricing summary			ROM		Estimate	Proposal	Agreed CO	Contributed value	A10.540.00
Direct cost to	cai								\$15,040.00
Tone labor name				\$100,000,00	\$20,000 (0 \$150	00.00		\$15,000.00
Labor subtotal				\$100,000.00	010,000.0			•	\$15,000,00
labor PCO markup (\otimes	\$300.00
								×	\$150.00
Cequipment									\$0.00
								\otimes	\$0.00
Equipment subtotal									\$0.00
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	me							8	\$0.00
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 Small tools & su 	pplies								\$0.00
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 Vendor total 									\$0.00
Vendor subtotal									\$0.00
 Indirect cost t 	otal								\$0.00
Time related own	rhead								\$0.00

5.4.1.1 UPDATE PRICING MANUALLY

As you assess the work related to the PCO and negotiate the potential change order, you can continue updating the pricing on the PCO, working towards an agreed upon change order price. When updating pricing, consider the following:

- The Pricing summary value types follow the same precedence order as they did on issues, with the farthest-right value taking precedence:
 - Estimate values take precedence over ROM
 - Proposed values take precedence over Estimate
 - Agreed values take precedence over Proposed
- The PCO's Current Value is the sum of the Self perform, Vendor, and Time related overhead subtotals

5.4.1.2 UPDATE PCO VALUES WITH ISSUE VALUES

If Change is not configured to automatically update value changes to higher levels, you can manually update the PCO Pricing tab with new pricing and associated vendor data from your issues. Select Update values > **Pull values from issue** from the Actions menu.

Current value \$10,000.00	Cost \$10,000.00	Markı \$0.00
Actions 👻 🕂 Add n	narkups	
Update values	Push values to Issue	
View as built totals summary	Push values to CCO	
Generate change document	Pull values from Issue	
Create new form	Pull values from CCO	
Labor		
T		

For example, you have a PCO with a total price of \$10,210, totaled from Estimate values in the Pricing summary on the PCO's Pricing tab.

As your field engineer assesses things out in the field, he determines the estimate to be a little low, so he changes one of the assigned issue's Estimated subtotal to \$12,000. You can update the PCO with the new pricing by selecting Pull values from issue from the Actions menu.

You will receive a prompt asking if you are sure you want to update the PCO's values. When you select Yes, the PCO's Estimate values update and the PCO's new Grand total updates to \$12,000.

NOTE Pricing changes made on the PCO do not change the pricing of the assigned issue(s). Pricing changes made on the issues can only change pricing on the related PCO if you select Update PCO values with issue values from the Actions menu or you have configured Change to automatically update value changes to higher levels. Other, issue pricing on the PCO is only for informative purposes.

The ability to automatically update values from higher or lower levels is configured in project Settings > Configurations > **Pricing configuration**. When set to automatically update value changes to higher levels or lower levels, any changes made at the issue level are automatically reflected in the PCO. Any changes made at the PCO level are automatically reflected in the issue and CCO.

When the Change is not configured to update values to higher levels, you can manually update values as follows:

- At the issue level, you can push values to the PCO. If the PCO is associated to a CCO, the value is automatically pushed to the CCO.
- At the PCO level, you can push values up to a CCO or pull values down to an issue.
- At the CCO level, you can pull values from the PCO. If the issue is associated with a PCO, the value is automatically pulled from the issue.

When Change is not configured to update values to lower levels, you can manually update values as follows:

- At the issue level, you can pull values from the PCO. If the PCO is associated to a CCO, the value is automatically pulled from the CCO.
- At the PCO level, you can push values to the issue or pull values from the CCO.
- At the CCO level, you can push values to the PCO. If the issue is associated with a PCO, the value is automatically pushed to the issue.

If you make a change to the pricing at any level, the Pricing pages at the other levels show a banner warning that the updated values are not reflected at all levels. For example, if a pricing change is made at the issue level, the banner shows at the PCO and CCO levels. To update values, go to the Actions menu. Then select whether to push values down or pull values up.

5.5 PCO LOG

On the Change page, the PCO Log tab contains a register of all your PCOs.

- Executed PCOs have a green checkmark next to them and are no longer editable
- Dropped PCOs have a yellow caution sign next to them and are locked

- Note that there is no delete button. Once a PCO is created, it cannot be deleted
- Many of the PCO details and statuses are editable from the Issue Log register
- The PCO Log provides subtotals at the bottom of the register for total number of PCOs and total current values of the PCOs

end SSU	ING ES 3	ISSUE LOG	POTENTIAL C LOG	CL	IENT CO LOG	ACTION ITEMS	3	AUDIT LOG	CHAN TEMPLA	GE ATES
D									3	(
	PCO ID 👘 👘	Description	Creation date 📋 😇	PCO aging_	PCO status	PCO date client no	Ball in co	Value type 🚃	Current value	Pri
	077	IH PC0 077	09/21/2018	(Dropped 🛕					
	PB001	Bearing Pads Rework	09/21/2018	(D Executed 🥥		Contractor			In
	<u>P801</u>	Partial Owner Request	09/20/2018	1	Dropped 🛕					
	016	MH - Bearing Pads	09/07/2018	14	In Review		Client			
	017	Anchor Bolts	09/07/2018	14	In Review				\$15,000.00	0
	045	FH PC0 099	09/07/2018	14	In Review				\$20,075.00	0
	MWR - PCO1	Keep same description as origi	08/21/2018	3	Executed 🥥		Contractor		\$20,075.00	ð In j
	PC0 44	B0 PC0 022	08/17/2018	3	5 Dropped 🛕					
	PC0 055	PCO demo.	08/16/2018	3	5 CCO					
	MTH-PC01	Bearing Pad PCO	07/10/2018	73	B Executed 🥥		Contractor		\$16,500.00	0 In

By clicking the drop-down menu on the View box, you can change the viewsets of your table and can save a custom view. You can also export your table (will export the data exactly as displayed within the table), show details, and search for data within the table.

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In Review				ć
CCO				
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You can generate a change document from the PCO log. Select a PCO, go to the Actions menu, and then select **Generate Change document**. See 5.8 Change writer on page 219 for information about generating change documents.

5.5.0.1 AGING DAYS

The number of days that a PCO has been open is shown in the PCO aging days open column. The Aging days value is calculated using today's date minus the start date. This calculations stops when the item

is changed to a status of executed or dropped.

5.6 CLIENT CHANGE ORDER (CCO) GENERATION

5.6.1 OVERVIEW

As you manage your issues and PCOs, you can convert them to Client Change Orders (CCOs) when they reach any of the following criteria:

- You are finalizing the negotiating process with the client
- You have an agreement in place
- You have something up for signature or already signed
- You already know the final value of your change order



5.6.2 CLIENT CHANGE ORDER (CCO) CREATION

A CCO can be generated from an existing PCO, or directly from an Issue. The CCO will carry over all pertinent data from the PCO/Issue and populate fields within the CCO. Just like the relationship between issue and PCO, the link between Issue/PCO to the CCO is one-way, upstream. Data carried over from the Issue/PCO into the CCO can be modified without any changes occurring to the former; however, changes to the Issue/PCO can be pushed upstream to the CCO.

The following steps walk you through how to convert an issue to a PCO.

5.6 STEP BY STEP 1 – CREATE A CLIENT CHANGE ORDER (CCO)

Summary: Create a CCO when the change is finalized and ready to send to the owner.

Considerations: When converting to a change order, an issue is limited to 250 unique cost items or 100 unique pay items. If a message shows indicating that you must remove cost items or pay items, it is best practice to create a new issue. Creating a new issue lets you create another change order with the removed cost items and pay items.

1. From the PCO tab, select the PCOs you want to associate to a CCO, and then click the **Associate** to Client change order icon..

							NEW ISSUE	25 ISSUE L	DG PCO LOG
Actions	• [<u>D</u> i							
	PCO ID 📋	PCC	0 name 😑	CCO ID	-	PCO creation d 😑	PCO agin 🔤	PCO status 😑	PCO date Client notified =
	<u>PCO - 9</u>	Issu	ue F			06/06/2024	43	New	
	<u>PCO - 8</u>	PCC	<u>0 8</u>			06/03/2024	46	New	
	<u>PC0 - 7</u>	Fro	m Contract			05/22/2024	58	New	

The Associate to Client change order dialog box opens.

2. Indicate whether the PCO is to be associated to a new CCO or an existing CCO, and then enter the CCO ID and CCO name. You can also enter an alternate CCO ID and a description of the change.

CCO Typ	e	onento	nunge of								
🖲 New		⊖ Existir	ıg								
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CCO -	19										
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						-	_				
В	Ι	<u>U</u>	E 1	: 1	≣	ŧΞ	*≣				

3. Click **Save**. The CCO Details page opens.

What's next: You can enter additional CCO details, manage pricing, and add supporting documents.

5.6.2.1 CONVERT TO CCO FROM ISSUE/PCO RECORD

Another option for Converting to a CCO is on the Details tab of an issue record. Clicking the Assign to potential change order link will open the window to assign the issue to a PCO.

ssue description			Change orders
C	reated by Paul Bennion on	09/19/2018	
Issue name	*Issue start date		📴 Assign to potential change order
Paint peeling	09/19/2018	m	jej
	Hint: Date of the star	t of impact	Convert to client change order
Description		966	
Found near quality on walk through			Solit issue

5.6.3 CCO HEADER

The header at the top of your CCO record contains the same functionality as the issue/PCO header, allowing you to update the following:

- CCO status
- Pricing status
- Proposal status

5.6.4 CCO DETAILS TAB

Below the header on the CCO record, there are tabs for capturing the CCO's details, costs, and supporting documentation.

Current value	Cost	Billing markup	Markup	Markup	1%	Deductions	Net value	CCO status		Pricing status		Proposal status		
Actions 👻	0.00000	0.00000	0.00000	DETAILS	PRICING	SUPPORTING	WORKFLOW	New	·	None	·	None	•	• 9
												Cancel	S	ave

The CCO Details tab contains the identifying information you entered on the Convert to client change order window, along with several other fields to capture the change order amount, approved extension information, and type of signing agreement.

Overview - CCO Details Tab

	Title	Description
1	CCO navigation	Lets you navigate to other CCOs without having to go back to the CCO log. Click the arrow to see a list of CCOs, and then select one. The selected CCO opens in the same window.
2	CCO ID	Free text entry for describing the CCO, carried over from filling out the Convert to client change order window.
3	CCO name	Free text entry for the name of the CCO.
4	Alternate CCO ID	Free text entry can be used as a subset to your CCO ID.
5	CCO start date	The date that work on the CCO started. You can use a start date that is different from the created date when the day work on a CCO was started is different from when the CCO was created. The CCO aging

Overview - CCO Details Tab (continued)

	Title	Description
		days open column on the CCO log uses the start date instead of the created date to give a more accurate count.
6	Description of change	Free text entry for describing the PCO, carried over from filling out the Convert to client change order window. You can use the Expand icon to expand the text box for easy text entry and viewing. You can then collapse the text box when you are finished.
7	Control budget change	Information about the contract adjustment status and the change register ID from InEight Control.
8	Additional Details	Sections for Client change order execution details, Schedule impact, Responsible parties, Correspondence, Request for information, Tasks, Revenue category, and Custom fields.
9	Associations	 List of issues or PCOs that were associated to CCO for creation Clicking Issue or PCO ID link will navigate you back to Issue/PCO record Cost information is available in the Current value, Cost, Billing Markup, Markup, Markup %, Deductions, and Net value columns Able to add or remove issues or PCOs to the CCO if they are not assigned to an existing CCO
10	Client change order terms	Terms specific to the CCO. You can add up to two terms. You can use the Expand icon to expand the term text boxes for easy text entry and viewing. You can then collapse the text boxes when you are finished.
11	eSign	Lists of eSign recipients and project contacts that default as signees for an eSignature via a provider, such as DocuSign. When custom labels are used for contacts in InEight Platform project details, Change uses the labels set at the suite administration level. The labels are also used in the Send for signature dialog box.

5.6 Client Change Order (CCO) Generation

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5.6.4.2 ESIGN

The eSign section lets you view or add recipients to be used as default eSign signees. This section has subsections for eSign and Project contacts. All signees must be added to at least one section.

- Names in the eSign section are populated from the project eSign setup tab (Project settings > Change > Configurations > eSign setup). You can also manually enter the names of the signees.
- Names in the Project contacts section are populated with contact information from project contacts added in Project details. This section is for reference only. If you want to add or change recipients, you must edit the Project contacts section of the Project details.

5.6.5 ADDITIONAL DETAILS

The Additional details section has expandable subsections for the following features:

- Client change order execution details
- Schedule impact
- Responsible parties
- Correspondence
- Request for information
- Tasks
- Revenue category
- Custom fields

5.6.5.3 CLIENT CHANGE ORDER EXECUTION DETAILS

The Client change order execution section contains fields that are used when the CCO is executed.

The Signing agreement field describes how the CCO was executed (bilaterally, unilaterally, or unassigned). The Current value is carried over from the Pricing tab and is read only. The executed change order amount typically matches the Agreed Change Order Amount, but could differ due to changes by the client. This value is shown in the CCO log.

The remaining fields are read-only and are automatically filled when the CCO is executed.

5.6.5.4 SCHEDULE IMPACT

The Schedule impact section includes the Approved time extension and the Time extension. The Approved time extension is the number of days granted by the client per CCO. You can also select *Deferred* to defer the extension or N/A when the time extension is not applicable. The time extension fields show the time extension requested. When there is only one PCO associated to the CCO, the PCO delay days populate this field. When there is more than one PCO associated, the field is blank. You can add forecasted days in the Forecast field.

The Request for information fields are assigned by a supporting document of type RFI.

Custom fields include CCO custom lists 1 and 2 and CCO custom fields 1-4.

5.6.5.5 CORRESPONDENCE

Use the Correspondence section to track the following:

- CCO Date client notified. An information icon in the Date column shows the specific supporting document that must be attached to populate the date. You can add the document on the Supporting documents page. After a document is added, a link is shown in the File/Link column.
- CCO Date price to client. An information icon in the Date column shows the specific supporting document that must be attached to populate the date. You can add the document on the Supporting documents page. After a document is added, a link is shown in the File/Link column.
- Executed change order. An information icon in the Date column shows the specific supporting document that must be attached to populate the date. You can add the document on the Supporting documents page. After a document is added, a link is shown in the File/Link column.

5.6.5.6 REQUEST FOR INFORMATION

The Request for information fields are assigned by a supporting document of type RFI. The heading for the Request for Information section includes a counter so you can quickly see the number of associated RFIs the CCO has.

5.6.5.7 TASKS

The Tasks section shows all tasks assigned in InEight Compliance for the CCO. For each task, the section shows the task name with a link to the task, the name of the person assigned to the task, the due date, and the current state. Overdue tasks show in red in both the Due date and State columns. Pending tasks show in yellow in the State column. Completed tasks show in green in the State column.

5.6.5.8 CUSTOM FIELDS

Custom fields include CCO custom lists 1 and 2 and CCO custom fields 1-4.

5.6.6 CCO PRICING TAB

On the CCO Pricing tab, you can work out the final pricing for your change order, ending up with a Current Value for the CCO derived from Contributed values based on Agreed subtotals. You have the same pricing functionality on the CCO Pricing tab as you have on the PCO Pricing tab.

- Saved values in the PCO Pricing tab populate the CCO Proposal tab on original creation. A PCO row is the sum of the pricing items in the PCO and the issue pricing items. Individual markups are not included in the PCO row, but are shown below it. This reporting lets you see value when collapsed.
- Pricing changes made on your CCO, will not affect assigned issues/PCOs.
- The Pricing summary has the same rules of precedence for ROM, Estimate, Proposal and Agreed values.

Change management >	CC0-											
Current value	Cost	Markup	Margin	Client CO status		Pricing status		Proposal status				
300.00	\$300.00	\$0.00	0%	New	-	None	•	None	•			
Actions 👻 🔶 Ad	d markups		DET	FAILS PRICING	SUPPO	DRTING MENTS	WORKFLOW ASSIGNMENTS			:	E = 19 ta	: 🔋 🕫
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Direct cost subtot	al											\$300.00
Vendor total												\$0.00
vendor subtotal												\$0.00
Indirect cost t	otai											\$0.00
Type time relator	I overhead name											\$0.00
Time salated succha	ad exclusion									0		\$0.00
Fixed indirect or	unt											\$0.00
Type fixed indire	t cost name									×		\$0.00
Fixed indirect cost s	ubtotal									•		\$0.00
Non billables												\$0.00

• The CCO's Grand total is the sum of the Direct cost, Vendor, and Indirect cost subtotals.

The ability to automatically update values from lower levels is configured in project Settings > Configurations > **Pricing configuration**. When set to automatically update value changes to lower levels, any changes made at the PCO level are automatically reflected in the CCO. Any changes made at the CCO level are automatically reflected in the PCO.

When the Change is not configured to update values to higher levels, you can manually update values as follows:

- At the issue level, you can push values to the PCO. If the PCO is associated to a CCO, the value is automatically pushed to the CCO.
- At the PCO level, you can push values up to a CCO.
- At the CCO level, you can pull values from the PCO. If the issue is associated with a PCO, the value is automatically pulled from the issue.

When Change is not configured to update values to lower levels, you can manually update values as follows:

- At the issue level, you can pull values from the PCO. If the PCO is associated to a CCO, the value is automatically pulled from the CCO.
- At the PCO level, you can pull values from the CCO.
- At the CCO level, you can push values to the PCO. If the issue is associated with a PCO, the value is automatically pushed to the issue.

If you make a change to the pricing at any level, the Pricing pages at the other levels show a banner warning that the updated values are not reflected at all levels. For example, if a pricing change is made at the issue level, the banner shows at the PCO and CCO levels. To update values, go to the Actions menu. Then select whether to push values down or pull values up.

5.6.7 CCO LOG

The CCO Log tab is a display of all CCOs, regardless of status. Most fields will contain data from the CCO Details header and Pricing. However, there are some editable fields on within the CCO Log.

- Executed CCOs have a green checkmark next to them and are no longer editable
- Dropped CCOs have a yellow caution sign next to them and are locked
- Note that there is no delete button. Once a CCO is created, it cannot be deleted
- The CCO Log provides subtotals at the bottom of the register for total number of CCOs and total current value of the CCOs (based on those CCOs that have locked pricing – ROM, Estimate, Agreed)

			NEW ISSUE	ISSUE LOG	POTENTIAL CO LOG	CLIENT CO LOG	AUDIT LOG						
) (i) (
	Client CO ID 👳	Description	Creation date 👃 😇	CCO aging 😑	Client CO 😑	CCO date client noti 😑	Ball in court 👳	Value type	Current value	Control			
	PB111	Potential change request	09/21/2018	0	In Review								
	PB001	Bearing Pads Rework	09/21/2018	0	Executed 😔			Executed CO	\$17,775.00	38.0			
	MWR - CC01	MWR - Bearing Pads	08/21/2018	31	Executed 😔		Client	Executed CO	\$17,775.00	35.0			
	003	Change Order #3	08/16/2018	36	Executed 😔			Executed CO	\$49,501.00	35.0			
st.	023	AH CC0 023	07/13/2018	70	Dropped 🔥 🛕					28.2			
	MTH CCO1	MTH - Bearing Pads	07/11/2018	72	Executed ⊘			Executed CO	\$18,775.00	28.1			
	077	BQ CC0 022	07/11/2018	72	In Review								
	076	MH CC0 001	07/10/2018	73	In Review		Client	Estimate	\$30,231.00	28.0			
	009	Paint Peeling	06/20/2018	93	In Review								
			1										

You can also export your table (will export the data exactly as displayed within the table, thus if any filters are on that data will not export), show details, and search for data within the table.



You can generate a change document from the CCO log. Select a CCO, go to the Actions menu, and then select **Generate Change document**. See 5.8 Change writer on page 219 for information about generating change documents.

5.7 CLIENT CHANGE ORDER (CCO) EXECUTION

Once the change order is finalized with the client, you can change the CCO status to Executed.

Client CO status				
•	Executed	-		

NOTE

An Executed change order document type must be uploaded as a supporting document prior to changing CCO status to Executed.

- When the CCO Status in the CCO Details Header is changed to Executed, the Close CCO and mark complete window appears for final closeout of the change order
- When the CCO is closed, it is sent to the Change Register of InEight Control to make a contract adjustment for cost, revenue, and man-hours, using the details and values entered in the CCO in Change Management

5.7.1 CLIENT CHANGE ORDER WORKFLOW SETTINGS

With Client Change Orders you can turn on the workflow to send the CCO through an approval process before execution is complete. This is similar to the issue approval workflow.

Once a CCO is completed (and workflow is turned on) the Submit CCO for approval button shows up in the top left corner.

5.7 Client Change Order (CCO) Execution

Client CO status		Pricing status	Proposal status				
In Review	-	Not Started 👻	Not Started	•			
SUPPORTING DOCUMENTS	PROPOSAL & PRICING				Σ	3	Ŧ
			Cancel	Submit client CO f	or approval		Save

Click the button to send an approval request to whomever is set up as the approver in the Project Settings. To get to the CCO Workflow settings go to Project Settings > Change > Workflow > CCo Approval Setup and then turn on or off the approval step.

Overview - Close CCO and Mark Complete Window, Executed details

	Title	Description	
1	Agreed Change Order Amount	Pulled from CCO Pricing Grand total.	
2	Executed Change Order Amount	 Free text entry pulled from CCO Details tab. The net value is used by default. This is the value that will be pushed into the InEight Control Change Register 	
3	Approved Time Extension	 Drop-down selection menu; time extension granted by client per CCO Shows in the CCO Log Defaults to 0 but can be changed 	
4	Approved Time Extension	Time extension granted by client per CCOShows in the CCO Log	
5	Signing Agreement	 Used to indicate how the contract was executed, for information only Bilateral - Both client and contractor Unilateral - Client or contractor only Unassigned 	
6	Notes	Free text entry	
Executed details			
--------------------------	---	--	-------------------------------
Current value 🛈 🚺	(2 •Executed change order a	imount
			\$35,000.00
*Approved time extension	3	Hint: Enter value from ch. •Approved time extension	ange order document 1 days
Deferred	-		
		Hint: Enter value from ch	ange order document
signing agreement		6 Notes	400
	•	Type message here	
		Hint: Provide information	on the difference o
		Hint: Provide information	on the difference o

NOTE Executed CCOs can be switched back to In Review with applicable permissions.

5.7.2 EXECUTED CCO STATUS

After a CCO is executed, the status changes to Executed in the Issue log, PCO log, and CCO log, and all associated issues and PCOs are locked and cannot be edited, with the exception of a temporary vendor. See Edit vendor information for information about editing a temporary vendor.

When a cost item is associated to an executed CCO, you can view details of the cost item by selecting it and then clicking the **Edit** icon. The resources details and cost categories are shown but are read-only.

5.7.3 VENDOR CHANGE ORDER CREATION

You can configure Change to automatically create a vendor change order (VCO) in InEight Contract for any pricing items that are not already associated to a VCO. When the setting (Settings > Change > Configurations > Pricing configuration > **Vendor change order configuration**) is set to *Yes*, Change creates the VCOs upon execution of the CCO. You are prompted in the CCO Execution wizard to select the vendor change order type. After the CCO is executed, the VCOs are in Contract with *Service Account* as the Created by name. When the project setting is set to *No*, you must create the VCOs manually in Contract.

5.7 STEP BY STEP 1 – EXECUTE CCO

Summary: Execute a CCO when the change order is finalized with the client.

Considerations: If the Vendor change order configuration setting in the project settings Configurations (Settings > Change > Configurations > Pricing configuration > **Vendor change order configuration**) is set to *Yes*, Change automatically creates a vendor change order from the executed CCO.

Quick steps:

1. From the CCO Log tab, select the change order.



- 2. Select the Supporting Documents tab.
- 3. Click the **Add supporting documents** icon, and then add a supporting document with the type Executed change order
- 4. In the CCO header, change the CCO status to Executed. The Close CCO and mark complete window opens.
- 5. Complete the required fields.

Agreed change order amount 🛈	*Executed change order amount
	\$17,775.00
	Hint: Enter value from change order document
*Approved time extension	*Approved time extension days
Number of days	- 4
	Hint: Enter value from change order document
Signing agreement	Notes 400
Bilateral	Type message here

- 6. Click Next.
- 7. Review and confirm the correct Executed Change Order document is attached to the CCO. If it is not attached, you can attach it in the wizard.
- 8. Click Next.
- 9. Select the Vendor change order type for the pricing items that are not yet assigned to a VCO.

The f	following items will automatically create a Vendor Change order for ea	ach contract listed.		
	ID - Name	Value	Vendor change order type	
*	10027 Abrune 1000040 API constant.		Select one 👻	
	PCO : pco1 - issue1	\$100.00		
	Issue : 485 - issue1	\$111.00		
	Issue : 486 - issue2	\$100.00		

10. Click **Submit**. Upon successful completion, the CCO is pushed to the Control change register.

What's next: If Change is configured to automatically create VCOs, the VCOs are created in Contract for the pricing items. If Change is not configured to create VCOs, you can associate the CCO to a VCO in Contract.

5.8 CHANGE WRITER

If you need to create a customized change document between the contractor, owner or subcontractors, Change provides Change writer to aid in the development. This is a legal document that needs to be signed by all parties and stakeholders. The Change writer supports both standard and bulk template generation.

5.9 STANDARD AND BULK TEMPLATE PROCESSING

The Change writer lets you choose between standard and bulk processing.

Standard processing lets you choose between generating a merged PDF of all templates or individual documents for each template. If you use standard processing with templates that include template contact tags, you can choose one contact for a customized document.

Bulk processing automatically generates a merged PDF document for up to 10 contacts in a single action. The bulk templates feature works in conjunction with template contact tags, so you can customize documents for up to 10 contacts, similar to a mail merge. You can use bulk processing for generating multiple documents that include customized information for each contact, such as a cover letter with a pricing request.

5.10 GENERATE A CHANGE DOCUMENT

When you are ready to create a change document, you can generate it from one or more templates. Go to the Actions drop-down menu from any issue, PCO, or CCO, and then select **Generate change document** to start the Change writer wizard. The Change writer wizard supports standard or bulk processing.

5.10 STEP BY STEP 1 – GENERATE A STANDARD CHANGE DOCUMENT

1. From an issue, PCO or CCO, select the **Actions** menu drop-down list, and then select **Generate change document** from the menu. You can also find this option in the Actions menu on the PCO and CCO logs. Select a PCO or CCO, and then go to the Actions menu.



- The Change template opens to show the assigned templates to your project.
- Templates for lower levels are available. For example, if you are in a PCO, templates for PCO and issue are available. When you use an issue or PCO template type at a

higher level and choose to generate the document as individual documents, Change generates a separate document for each issue or PCO.

2. Move one or more templates from the Available templates column to the Selected templates column.

				Change template details	
t the required templates to start generating e	change docu	ment.		Template generation type ()	Generate document as
				Standard	Individual documents
Available Templates		Selected Templates	1	Standard	Generate document file type as
.Search Q,		Search Q		Bulk	Select one
COEBC course aaaaxcv	+	all tags	•	Name of document file (1)	Select watermark stamp
Contacts 4-4 ContactTags_1	+		*		Select one
					Cancel

Use the up and down arrows to the right of the Selected templates column to change the order of the templates, if needed.

- 3. In the Change template details section, select the *Standard* template generation type.
- 4. Select one of the following in the Generate document as field:
 - Individual documents to get a separate document for each template you selected.
 - Merged document (PDF only) to merge the templates into a single PDF document.
- 5. If you selected Individual documents in the previous step, use the Generate document file type as field to indicate whether to download as a template file type or download as a PDF. If you selected Merged document in the previous step, skip this step.
- 6. Use the toggle to indicate whether to save the contract document in the Supporting documents tab.

If you choose to save in the Supporting documents tab, add the name of the document. After the document is generated, the name shows in the Title and the File/Link columns on the Supporting documents register.

- 7. Select the watermark text. If the organization-level settings require a document, the Select watermark stamp field is required. Also, if the organization-level settings require a watermark and the end watermark event has not occurred, the Select watermark stamp field is required. If the end watermark event has occurred, the watermark is optional.
- 8. Click Next.
- 9. If Change writer detects a template contact tag, processing moves to the Select contact step. If no template contact tags are detected, the Change document wizard skips this step and moves to the Review fields step.

y one	e project contact ca	an be selec	ted for Standard ten	iplate ger	eration type.																		
Sele	ected project	contact	s																				
	First name	Ŧ	Last name	Ŧ	Full name	Primary email	Secondary	email 👳	Company	Ŧ	Contact type	*	lsUser 👳	Department	Ŧ	Position	-	Title	÷	Office number		Mobile number	Ŧ
										No Sele	cted project contac	15.											
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vail	ilable project	t contac	ts Last name		Full name ==	Primary ernal	- Secondary	email 📼	Company	-	Contact type	-	ls user —	Department		Position		Search		Office number		Mobile number	
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wail € €	ilable project First name Bob	t contac	ts Last name Builder	*	Full name 🤤	Primary email bob builderco@gmail.	- Secondary r	email 👻	Company builder oo	▼	Contact type Client	P	Is user	Department	Ŧ	Розітіон QA QA QA QA	Ŧ	Search Trile	Ŧ	Office number	₹	Mobile number	Q
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vail	ilable project First name Bob	t contac	IS Last name Builder	1	Full name 🦁	Primary anal bob builderco@gmail.	Secondary s	enal 🔻	Company builder oo	~	Contact type Client	P	Is user	Department	~	Розійон ОА ОА ОА ОА ОА ОА ОА ОА	Ŧ	Search Title	Ŧ	Office number	~	Mobile number	Q. T

- Select one contact from the contact list, and then click **Next**. Processing moves to the Review fields step.
- If no contacts have been configured in the project contacts, this step is disabled. You can either go back, so you can remove the templates that have template contact tags, or cancel.
- 10. On the Review fields step page, expand to Review templates page to see a list of all templates used. If you specified a contact, the contact name is also shown. The review dialog box lets you edit or add information to the fields that will populate the document after it is generated. Any field that is blank is not added to the document, and you cannot add information later.
- 11. Review the fields and enter any information in the fields that apply to your issue. When you use an issue or PCO template type at a higher level and choose to generate the document as individual documents, Change generates a separate document for each issue or PCO. When you choose to merge the document into a single PDF, the document uses the template for each issue

and merges it into the single document. When you review the templates, the project name and the fields are repeated for each issue.

- NOTE The <<Blankn>> tag, where n is a value in the range 1-15, shows in the downloaded tag list. The tag serves as a placeholder in your template where the text can be entered to appear in the fields when you review the template. When you generate the Microsoft Word document, the text is replaced with what you entered in the review. You must enter text each time you generate the Word document. If you do not enter values in the Review fields, the <<Blankn>> tag is shown in the Word document.
- 12. After you have reviewed all changes, you can see a preview of your document by clicking the **Preview document** button. The preview opens in a separate window with the tags filled in. If you used collection tables in any of your templates you cannot view them in the preview document. The content of the preview varies as follows:
 - If you selected Download as a PDF document when you generated the document, the preview contains all of the templates in the order you specified.
 - If you selected Download as individual documents when you generated the document, the preview contains only the template that was displayed when you clicked Preview document. You can preview other documents by selecting the file from the Review templates list and clicking preview document.
- 13. Click **Finish**. If you use templates from other levels, multiple completion messages are shown.
- 14. If you created a merged document, Change writer downloads a PDF that includes all of the templates. If you created individual documents, Change writer downloads a PDF for the selected template only.

5.10 STEP BY STEP 2 – GENERATE A CHANGE DOCUMENT USING BULK TEMPLATE PROCESSING

You can use bulk template processing when you want to generate separate change documents in a single action. When used in conjunction with templates that contain template contact tags, you can customize a document for each specified contact.

If you want to generate customized documents, you must include a template that has template contact tags. Contacts must be assigned in the project's Assigned contacts (project > **Assigned contacts**).

1. From an issue, PCO or CCO, select the **Actions** menu drop-down list, and then select **Generate change document** from the menu. You can also find this option in the Actions menu on the PCO and CCO logs. Select a PCO or CCO, and then go to the Actions menu.



- The Change template opens to show the assigned templates to your project.
- Templates for lower levels are available. For example, if you are in a PCO, templates for PCO and issue are available. When you use an issue or PCO template type at a higher level and choose to generate the document as individual documents, Change generates a separate document for each issue or PCO.
- 2. Move one or more templates from the Available templates column to the Selected templates column.

lect change templates				Change template details	
the required templates to start generating	change docu	ment.		Template generation type (1)	Generate document as
				Standard	Individual documents
Available Templates		Selected Templates 1		Standard	Generate document file type as
.Search Q		Search Q		Bulk	Select one
COEBC course aaaaxcv	•	all tags	•	Name of document file (1)	Select watermark stamp
Contacts 4-4 ContactTags_1	+		*		Select one
(general tagaTemp0) (jusue collection, 1	v				Cancel

Use the up and down arrows to the right of the Selected templates column to change the order of the templates, if needed.

- 3. In the Change template details section, select the Bulk template generation type.
- 4. Use the toggle to indicate whether to save the contract document in the Supporting documents tab.

If you choose to save in the Supporting documents tab, add the name of the document. After the document is generated, the name shows in the Title and the File/Link columns on the Supporting documents register.

- 5. Select the watermark text. If the organization-level settings require a document, the Select watermark stamp field is required. Also, if the organization-level settings require a watermark and the end watermark event has not occurred, the Select watermark stamp field is required. If the end watermark event has occurred, the watermark is optional.
- 6. Click Next.
- 7. If Change writer detects a template contact tag, processing moves to the Select contact step. If no template contact tags are detected, the Change document wizard skips this step and moves to the Review fields step.

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Selec	ted project	contact	8	cription gen	and the second second																			
	First name		Last name	-	Full name		Primary email	- 5	Secondary email	- Cor	gany	- Contact type		IsUser	Department		Position		Title		Office number		Mobile number	
												No Colored and and												
waila	able project	t contac	ts Last name	~ 1	Full name	7	Primary email		Secondary email	ter Con	рапу		-	Is user	Department	7	Position	Ŧ	Search	~	Office number		Mobile number	0
Availa	able project First name Bob	t contac	ts Last name Builder	7	Full name Bob Builder	4	Primary email bob.builderco@gma	≂ S	Secondary email	는 Con	pany fer co		Ŧ	Is user 3	E Department	-	Position	Ŧ	Search	Ŧ	Office number	7	Mobile number	
Availa €	able project First name Bob	t contac	ts Last name Builder	(P)	Full name Bob Builder	-	Primary email bob.builderco@gma	∓ S atc.	Secondary email	TTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTT	pany fer co		Te.	ls user 3 No Yes	E Department	7	Position QA QA		Search Title	T.	Office number	. 7	Mobile number	-
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- Select up to 10 contacts from the contact list, and then click **Next**. Processing moves to the Review fields step.
- If no contacts have been configured in the project contacts, this step is disabled. You can either go back, so you can remove the templates that have template contact tags, or cancel.
- 8. On the Review fields step page, expand to Review templates page to see a list of all templates used. If you specified contacts, the templates are listed for each contact name.

Review templates 🔹	,
Template name	alues will replace the corresponding tags in change document.
Bob Builder	
Template with contact tags	
Template 1.1	
Issue Level 7/6	
Josh B	
Template with contact tags	
Template 1.1	

Click each template to review the information. The review dialog box lets you edit or add information to the fields that will populate the document after it is generated. Any field that is blank is not added to the document, and you cannot add information later.

- 9. Review the fields and enter any information in the fields that which apply to your issue. When you use an issue or PCO template type at a higher level and choose to generate the document as individual documents, Change generates a separate document for each issue or PCO. When you choose to merge the document into a single PDF, the document uses the template for each issue and merges it into the single document. When you review the templates, the project name and the fields are repeated for each issue.
 - **NOTE** The <<Blank*n*>> tag, where *n* is a value in the range 1-15, shows in the downloaded tag list. The tag serves as a placeholder in your template, so text can be entered in the fields when you review the template. When you generate the Microsoft Word document, the text is replaced with what you entered in the review. You must enter text each time you generate the Word document. If you do not enter values in the Review fields, the <<Blank*n*>> tag is shown in the Word document.
- 10. After you have reviewed all changes, you can see a preview of your document by clicking the **Preview document** button. The preview opens in a separate window with the tags filled in. If you used collection tables in any of your templates you cannot view them in the preview document. The preview contains all of the templates in the order you specified.
- 11. Click **Finish**. If you use templates from other levels, multiple completion messages are shown. Change writer downloads a PDF that includes all of the templates.

5.11 SUPPORTING DOCUMENTS

The PCO and CCO Supporting Documents tabs let you add supporting documentation. You can upload documentation via a file, link or through InEight Document integration.

Supporting documents can be uploaded via a file or through InEight Document integration. At the PCO level, no supporting documents are required, however it is a best practice to include all documents relating to the PCO. At the CCO level, an executed change order must be attached before the CCO status can be changed to Executed.

You add supporting documents by clicking the **Add** icon on the PCO or CCO Supporting Documents tab. You have the choice of adding a new supporting document or adding a document from InEight Document.

	+ 🖉 😣			DETAILS	F	PRICING & PROPOSAL	SUPPORTING DOCUMENTS
	New supporting document		Document type	Subtype		External document type	Document source
) sup	From InEight Document	cument.co	Draft change order				External link

When you choose **New supporting document**, you can add the appropriate documents as needed by filling out the Title and Document type in the Add supporting document dialog box, then browsing to your document file and attaching it. When the document is added from InEight Document, and the document type in Document matches a document type in the cloud platform, that value shows as the default document type. You can edit the document type as needed.

Add supporting documents		
*Title	*Document type	
	Select one	•
*File/Link		
	SELECT FILE	
Notes		200
Type message here		

When you choose From InEight Document, you are taken to the Document login window.

When you add a supporting document type of Proposal and subtype From vendor, you can select a vendor from a list of all contracts on the PCO or CCO. This lets you specify which contract the supporting document is related to and gives visibility into which contract to associate the proposal to.

5.11.0.1 SHOW SUPPORTING DOCUMENTS IN GENERATED DOCUMENTS

A toggle on the Supporting documents register, Show in generated document, lets you indicate whether the document is shown in a collection table based on the collection table type. When you have a supporting document that you do not want to show in a collection table in a generated document, set the toggle to *No*. When a document is generated, only the documents that were set to *Yes* are shown.

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Acti	ions 👻 🕑 🗹	× • >				DETAIL	S PRICING	SUPPORTING DOCUMENTS	WORKFLOW ASSIGNMENTS				Ŧ	Clear all filt Σ	U 3 (
													approval	Reject	Approve
	Title 👻	Document type	External document ty	External document st	Document source	-	Added on	Original Issue	Executed Change ord	DocuSign status	- App	proval status	Ŧ	Show in generated documer	nt
0		Certification			My computer		07/22/2022	192-Internal.demo		Not applicable	N	iot applicable		0	
0		Draft change order			My computer		07/22/2022			Not applicable	N	iot applicable		0	
0	Statement and	Draft change order			My computer	1	07/22/2022			Not applicable	N	iot applicable		0	
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0	-	Draft change order			My computer		07/22/2022			Not applicable	N	iot applicable		0	
	-	Draft change order			My computer		07/22/2022			Not applicable	N	iot applicable		0	
0		Certification			My computer		07/22/2022	192-Internal demo		Not applicable	N	iot applicable		0	0
0		Checklist			My computer		07/22/2022	192-Internal demo		Not applicable	N	iot applicable		0	(
	Statement of the local division of the local	Draft chappe order			My computer		07/22/2022			Completed	N	int applicable		0	

5.12 VIEW A SUPPORTING DOCUMENT

To view a supporting document, click the link in the File/Link column of the Supporting documents register. The document opens a preview in a new tab, so you can view the pages of the document and then decide if you want to download it to your workstation. You can use the **Previous** and **Next** buttons to view all pages.

storicalweathe	Record_2023-4	April-05			Previous Page No:1 / 1 Next	
Histori Omaha, (UTC-06	cal Weather Nebraska, 6811 00) Central Tim	Record 4, United States Of le (US & Canada)	f America, Lat. 41.2656	5 , Lon96.0493		
Selecter	Range: Da	te:	Time:	Date:	Time:	
From:	04/	05/2023	12:30 AM	To: 04/05/2023	11:30 PM	
Date	Time	Temperature	Weather conditio	on Wind	Precipitation	
04/05/20	23 12:30 AM	4 20°C ,67°F.	clear sky	0 m/s, 0.00 mph		
04/05/20	23 01:30 AM	1 22°C ,71°F.	clear sky	3.6 m/s, 8.00 mph		
04/05/20	23 02:30 AN	1 22°C ,72°F.	clear sky	6.17 m/s, 14.00 mp	1ph	
04/05/20	23 03:30 AM	4 20°C ,68°F.	clear sky	8.75 m/s, 20.00 mp	nph	
04/05/20	23 04:30 AN	14°C ,58°F.	clear sky	11.32 m/s, 25.00 n	mph	
04/05/20	23 05:30 AM	11°C ,51°F.	clear sky	9.26 m/s, 21.00 mp	nph	
04/05/20	23 06:30 AN	1 7°C ,44°F.	scattered clouds	12.86 m/s, 29.00 n	mph	
04/05/20	23 07:30 AM	1 5°C ,41°F.	broken clouds	10.29 m/s, 23.00 m	mph	
04/05/20	23 08:30 AN	4°C ,39°F.	overcast clouds	8.23 m/s, 18.00 mp	lph	
04/05/20	23 09:30 AM	1 3°C ,38°F.	overcast clouds	10.29 m/s, 23.00 n	mph	
04/05/20	23 10:30 AN	4 3°C ,37°F.	overcast clouds	11.83 m/s, 26.00 n	mph	
04/05/20	23 11:30 AM	4 2°C ,35°F.	broken clouds	10.8 m/s, 24.00 mp	iph	
04/05/20	23 12:30 PN	1 2°C ,35°F.	overcast clouds	8.75 m/s, 20.00 mp	lph	
04/05/20	23 01:30 PM	1 1°C ,34°F.	broken clouds	9.77 m/s, 22.00 mp	1ph	

To download the document to your workstation, click Download file.

5.13 SEND CHANGE DOCUMENTS FOR ESIGNATURE VIA DOCUSIGN

When a project is integrated with DocuSign, you can send a change document to DocuSign for an eSignature.

DocuSign tags can be embedded in the change document template. The DocuSign tags correspond to DocuSign recipients configured in the project settings and project contacts.

5.13 STEP BY STEP 1 – SEND A DOCUMENT FOR ESIGNATURE

After a document has been created, you can send it for official eSignatures via DocuSign.

Documents must be in Word, Excel, or PDF format. They must be saved to the PCO or CCO supporting documents page with the document source *My computer*. You must have Edit change document permissions to send documents. Ensure that your browser's pop-up blocker is disabled before you click Send from the Contract DocuSign wizard. You must have the Send for eSignature permission to send a document for signature.

1. From the PCO or CCO Supporting documents page, select one or more documents with the document source *My computer*, and then click the **Send for signature** icon.

Act	ons 👻 🤅) ľ ()	↑ ►				DETAILS	PRICING	SUPPORTING DOCUMENTS	WORKFLI	OW NTS		-	Clear all filt	Σ	Q
													Start appro	val Reject	Approv	e
	Title	File/Link	Document type	Subtype 🔫	External docu	External docu	Document sou 🤠	Added on	Added by	Original Issue 👘	Executed Chan	DocuSign status	Approval status	Approved/Reje	Approved/Reje	
		DocuSign from Ex	Correspondence	Vendor				01/26/2022				Recalled	Not started			
		DocuSign_Demo_	L. Certification					01/26/2022	Service Account			Signed	Not applicable			

The Send for signature wizard opens.

2. Review the Names in the Assigned section of the wizard. If you want to add additional recipients, find their names in the Unassigned section, and then click the **Add** icon. All signees in the Assigned section have ad-hoc signee tags that can be placed on the document in DocuSign.

signe	I recipients dictate who will	reactive an ensait to size the					
	ad .	receive an email to sign the	e document.Signing order	can be assigned based	l on the order of nee	ded signatures.	
Ausig	Recipient	Name	Company	Title	Email	Action	Signing order
Θ	DocuSign 1	Hanne	company		Linui	Needs to sign =	1
0	DocuSign 2			-		Needa to sign -	2
	Docusign 5			-		Needs to sign 👻	2
Unass	gned Becipient	Name	Сотрату	Title		Email	
Unass	gned Recipient Project contact: Owner	Name	Company	Title	1	Email	
Unass (+) (+)	gned Recipient Project contact: Owner Project contact: 1	Name	Company	Title		Email	
Unass (+) (+) (+)	Recipient Project contact: Owner Project contact: 1 Project contact: 2	Name	Company	Title		Email	
Unass (+) (+) (+) (+)	gned Recipient Project contact: Owner Project contact: 1 Project contact: 2 Project contact: 3	Name	Company	Title		Email	

- 3. For each assigned recipient, specify in the Action column whether they need to sign the document or if they are just to receive a copy. When the value is *Needs to sign*, the recipient receives a document that is ready to sign. When the action is *Receives a copy*, the recipient receives a snapshot of the document in the signing order. For example, if the recipient marked *Receives a copy* is second in the signing order, they receive the document after those first in signing order, even though they are not signing.
- 4. Review the values in the Signing order column. The numbers in the column specify the order in which the recipients are sent the document for eSignature. You can assign a single number to multiple signees. The signee or signees with signing order 1 are notified first by DocuSign. After all signees in signing order 1 have signed, DocuSign notifies all signees with signing order 2, and so on.
- 5. Click **Next**. The Add message page opens.
- 6. Enter an email subject line and message to the recipients, and then click **Send**. A DocuSign window opens with the documents you chose.



If the DocuSign window does not open, ensure that your browser's pop-up blocker is disabled.

7. If your DocuSign administrator has configured Advanced Options, you can optionally expand the **Actions** menu, and then select **Advanced Options**.

eview and sign for Project 102447 and PCO 1113		Actions Previe
T	·> c+ 집 집 221% ▼ (11	SAVE AND CLOSE SHORTCUTS
arch Fields X		DISCARD
tandard Fields		Edit Massage
Signature		Advanced Options
S Initial		
Date Signed		
		1
8 Attachment		
Note		
Approve		

You can then customize the following options:

- Branding Select a logo and brand colors, that were set up by the DocuSign administrator, for the envelope.
- Recipient privileges Give recipients options for how they sign the document, such as signing on paper, assigning delegates, and editing documents.
- Reminders Specify whether DocuSign sends reminders to signees, when to start sending them, and how often to send them.
- Expiration Set the number of days until the envelope expires and how often to send alerts.
- Comments allow senders and recipients to enter comments on documents in the envelope.

Click **Save**. You are returned to the document.

8. Optionally, add additional tags for signatures, initials, and dates. All names from the Assigned section of the wizard are shown in a drop-down list in the upper left pane. Select the name of the person you want to add, and then select Signature, Initial, or Date Signed, and then click the location in the document.



9. If the document has tags for a text box, drop-down list, check box, or radio buttons, add the values to the document. Click **Send**.

The documents are routed for signature, and DocuSign sends an email message to each recipient based on the signing order. In Change, the DocuSign status column on the Supporting documents page is populated with the status of *Sent*. You can hover over the status to see the name of the person who sent the document, the status of the signatures, and the date and time the document was last modified. After it is completed, the signed document is loaded as a supporting document with a document type *Signed document*.

When a supporting document has a DocuSign status of *Created*, *Completed*, or *Signed*, you can no longer edit the file link. When the status is *Sent*, you can edit the document in the original eSign envelope without incurring the expense of additional envelopes.

5.13 STEP BY STEP 2 – EDIT A SENT DOCUMENT

You must have the Correct eSignature permission to correct DocuSign documents.

1. On the Supporting documents register, hover over the ellipsis in the DocuSign status column for a sent document. The DocuSign Status dialog box is shown.

	U				DOCOMENTS	ASSIGNM	ENTS						-		
			(_			Start app	vroval Reje		
	Title 📃	File/Link	Document typ	'docum 👳	External docum	Document sour	Added on -	DocuSign status	-	Approval str	atus — Anoro	ved/Reie — Annrove	d/Reie_ Show in		
		100	Certification			My computer	11/29/2022	Not applicable		DocuSig	gn Status: Sent	Correct enve	Correct envelope 1		
	Aug. 10.11		Checklist			My computer	11/27/2022	Not applicable		Sent by: Est	eban Conforte	File/Link: PC	O DocuSign.docx		
	-	-	Design			My computer	10/25/2022	Recalled		Company	Name	DocuSion Status	Modified on		
			Design			My computer	09/20/2022	Sent		the state of the s					
			Certification			My computer	09/20/2022	Sent		Ineight		Sent	01/11/2023 2:32 PM		
_							0010410000	Maxandiashia		InEight	ALC: NO PROVIDE	Created	01/11/2023 2:30 PM		
_			Certification			My computer	08/04/2022	Not applicable							
	and a second		Draft change or			My computer	07/21/2022	Not applicable				Void eSignature	Correct		
	And and a second second	1.000.000.000	Request for infe			My computer	06/22/2022	Not applicable		Not applic	able		10		
0	100		Certification			My computer	06/22/2022	Created		Not applic	able				

2. Click the **Correct** button. DocuSign opens with the view of the original envelope.

Make the corrections in the DocuSign envelope. Refer to DocuSign documentation for more information about envelopes.

5.14 DOCUSIGN CERTIFICATE OF COMPLETION

After signing is completed, the certificate of completion is now available when you hover over the ellipsis in the DocuSign status field in Supporting documents.

The View certificate of completion link becomes available after a document is completed. The certificate of completion is stored in Supporting documents, but it does not take up a separate entry in the Supporting documents register. The certificate does not expire in Change.

DocuSign status		DocuSig	gn Status: Completed	Certificate	completion	
Signed		Sent by:		File/Link: P	CO DocuSign (2).docx	
Completed	•••<	Company	Name	DocuSign Status	Modified on	
		-	Inter Interpretation	Completed	04/10/2023 03:00 PM	
				Vie	w certificate of completion	1

When you click **View certificate of completion**, a preview of the certificate from DocuSign opens in a new tab. You have the option to download the file if you want to store it separately.

5.15 WORKFLOW ASSIGNMENTS

Each PCO and CCO is unique and might require various levels of approval for the PCO, CCO, or supporting documents. The Workflow Assignments tab lets you to set up the proper approval steps. Workflow approvals are assigned at the organization, project, and PCO or CCO levels to allow for maximum flexibility in the approval workflow.

5.15.1 PCO AND CCO WORKFLOWS

Workflows configured at the organization or project level are based on value thresholds. The thresholds are absolute values. When the change order reaches a value above or below the specified threshold, a user or role must approve the change order before it can advance. For example, if the threshold is \$1000, a change of \$1000 or -\$1000 or more starts the workflow.

You can configure approval workflows for any PCO or CCO. These approval steps are first in the approval workflow. If the difference in value of the PCO or CCO is greater than absolute value workflow thresholds set at the organization or project levels, the approval steps are shown on the page. They are marked with the information icon. Any steps you add are performed before those set at the organization and project levels. When the value of the PCO or CCO is within the absolute value thresholds or if no thresholds have been set, only the steps at the PCO or CCO level are performed.

A PCO does not need to be fully approved before converting it to a CCO. When you convert a PCO that has not been fully approved to a CCO, the PCO approval status is shown in the new Approval status field in the Associations section of the CCO details. You must complete all of the PCO approval steps before you can start the CCO approval workflow. The CCO must be approved, if required, before it can be submitted for execution.

5.15 STEP BY STEP 1 – SET UP A PCO OR CCO APPROVAL WORKFLOW

Set up an approval workflow for a PCO or CCO when the change order requires approval by various levels of your organization before it can advance.

Steps set at the PCO or CCO level are performed before those set at the project and organization levels, respectively. If the value difference of the PCO is greater than the absolute value thresholds, the steps are shown on the Workflow approvals page, and you cannot rearrange or delete them.

- 1. On the record page for a PCO or CCO, select the **Workflow Assignments** tab.
- 2. Click the **Add approval** icon. The Add approval slide-out panel opens.
- 3. Enter an approval step title, and then specify the users, groups, or roles who must give their approval.
- 4. Click Add.
- 5. Repeast steps 3 and 4 until all approval steps are added. You can use the up and down arrows to change the order of the steps you added, if necessary. Click **Save** after rearranging the approval steps.

When the change order is ready to advance, you can start the approval workflow.

5.15 STEP BY STEP 2 – START THE APPROVAL WORKFLOW

Start the approval process when the PCO or CCO is complete and you are ready to advance to the next stage.

1. Go to the Details page for the PCO or CCO, and then click **Save and start approval**. The Start approval dialog box opens to the approval steps page.

1 Approval steps	Add message 3 Atta	ach supporting documents	
		uonar)	
Change approval steps			
Approve	(i)		

- 2. Review the change approval steps.
- 3. Choose one of the following:

- If you do not want to add a message and attach supporting documents, click **Start**. The approval process starts.
- If you want to add a message or attach supporting documents, click **Next**. The Add messages page opens.
- 4. Choose one of the following;
 - If you want to add a message to be included in the workflow email, type and format it, and then click **Next**. The Attach supporting documents page opens.
 - If you do not want to add a message, click Next. The Attach supporting documents page opens.
- 5. Choose one of the following:
 - If you want to attach supporting documents, click **Next**. The Attach supporting documents page opens.
 - If you do not want to attach supporting documents, click **Start**. The approval process starts.
- 6. Select one or more supporting documents from the list of documents.
- 7. Click **Start**. The approval process starts.

The approvers receive a notification of the approval item. When you start the approval process and you are the first approver in the approval workflow, the first step of the workflow is automatically approved, and the workflow continues with the next step, if applicable. If you are the only step in the approval, you receive a second email confirming the new issue has been approved.

5.15.2 DOCUMENT APPROVAL WORKFLOWS

Document approval workflows are based on document type. Document approval workflows are set up at the organization and project levels. At the change order level, you can set up additional document approvals on the Document approval page of the Workflow assignments tab.

Current value \$0.00	Cost \$0.00	Billing markup \$0.00	Markup \$0.00	Margin 0.00%	Deductio \$0.00	ns	Net value \$0.00	PCO status In Review	•	Pricing status None	•	Proposal status Rejected	٠	
Actions 👻			DETAILS	PRICING	SUPPORTING DOCUMENTS	WORKFLOW ASSIGNMENTS	PRICING & PROPOSAL						Σ	Q
					Potential CO appr	oval setup Docum	ent approval setup					Cancel	s	Save
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Steps displayed he	e are established at an organ	ization and project level. Additional Po	cential CO document appro-	al steps may be added if	needed				Select one					•
()									Approval step					
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	2	(i) A CCM	test role											
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	t	(i) A CCM	test role											
~	Draft change order								Hint : Type 'al	ie'				
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5.15 STEP BY STEP 3 – SET UP A DOCUMENT APPROVAL WORKFLOW

Set up a document approval workflow when a document associated with change order requires approval by various levels of your organization before it can advance.

Approval steps might have been set at the organization or project levels. You cannot rearrange or delete the approval steps; you can add steps that are performed before those set at the project and organization levels.

- 1. On the record page for a PCO or CCO, select the **Workflow Assignments** tab, and then select the **Document approval setup** tab.
- 2. Click the Add approval icon. The Add approval slide-out panel opens.
- 3. Select a document type. If there are already approval steps for a document type, it is not shown in the drop-down list.

NOTE You can add steps to an existing approval by canceling this set up and then clicking **Add another step** for the document type.

- 4. Enter an approval step title, and then specify the users, groups, or roles who must give their approval.
- 5. Click Add.
- 6. Repeat steps 2 4 until all approval steps are added. You can use the up and down arrows to change the order of the steps you added, if necessary. Click **Save** after rearranging the approval steps.

When the change order is ready to advance, you can start the approval workflow.

5.15 STEP BY STEP 4 – START THE DOCUMENT APPROVAL WORKFLOW

Start the approval process when the document is complete, and you are ready to advance to the next stage.

- 1. Go to the Supporting documents page for the PCO or CCO, and then select one or more documents.
- 2. Click **Start approval**. The Start approval dialog box opens. The Start approval dialog box shows all the steps in the approval workflow for each document selected.
- 3. Review the change approval steps for each document. If there are group steps, you can select the group for the workflow. If you want to make changes to the approval process, click **Cancel**, and then go to the Workflow Assignments tab to make your changes. If the steps do not require changes, click **Start**. The Start approval dialog box stays open until all workflows have successfully started.

If you are an approver, you receive a notification of the approval item. Each approval workflow generates its own mail notification to the first approver. When you start the approval process and you are the first approver in the approval workflow, the first step of the workflow is automatically approved, and workflow continues with the next step, if applicable. If you are the only step in the approval, you receive a second email confirming the new issue has been approved.

When the document is in approval, you can change the supporting document title or add or change notes and other metadata. You cannot change the document type or the file link. If you want to change the file link or the document type, you must recall the document from the approval, make the changes, and then start the approval again.

You can view document approval workflow progress and history on the project Workflows > **Workflow details** page. If the workflow has been recalled, the name of the person who recalled the workflow is shown in the workflow heading.

5.16 AUDIT LOG

The Audit Log captures all changes made to issues, Potential Change Orders, and Client Change Orders. The CCM ID and Name/Description columns contain hyperlinks that if clicked will open the issue/change order for your review.

The Log shows the Value before and Value after the change and displays who made the change and when.

			NEW ISSUE	ISSUE LOG	OTENTIAL CO LOG	CLIENT CO LOG	AUDIT LOG			
										С
Audit action no 😑	Audit type	CCM ID 👘 👘	Name/Descrip	Action	Object	Attribute 👘	Value before	Value after	Changed by	Chan
97755	CCO	023	AH CCO 023	Manual Save	CCO	CCO status	In Review	Dropped	Paul Bennion	09/2
97755	PCO	077	IH PC0 077	Manual Save	PCO	PCO status	CCO	Dropped	Paul Bennion	09/2
97755	Issue	<u>8</u>	Removals	Manual Save	Issue	Issue status	CCO	Dropped	Paul Bennion	09/2
97752	CCO	PB001	Bearing Pads Re	Manual Save	CCO	CCO status	In Review	Executed	Paul Bennion	09/2
97752	CCO	PB001	Bearing Pads Re	Manual Save	CCO	Approved time ex		4	Paul Bennion	09/2
97752	PCO	PB001	Bearing Pads Re	Auto Save	PCO	PCO status	CCO	Executed	Paul Bennion	09/2
97752	Issue	<u>21 A</u>	PB - Bearing Pad	Auto Save	Issue	Issue status	CCO	Executed	Paul Bennion	09/2

5.17 INEIGHT CHANGE WORKFLOWS

5.17.1 INEIGHT CHANGE PROCESS

5.17.1.1 BASIC WORKFLOW

The basic workflow for managing a change order in InEight Change is quite simple, progressing from issue, to potential change order (PPO), to client change order (CCO).



5.17.2 BASIC WORKFLOW STEPS (PERSONA-BASED)

This flow looks at how a typical product team may manage a change order using InEight Change.



5.17.3 CHANGE MANAGEMENT WORKFLOW

This more detailed workflow organizes the change order process into eight main steps, using the InEight suite. Below each step are sub-steps for managing the change, along with the InEight application used for each sub-step.



See also: Change Order Management Business Process

5.17.4 CHANGE ORDER MANAGEMENT WORKFLOW (WITH PRODUCT SWIM LANES)

This workflow provides another way of looking at the process for managing change orders from the POV of the Contractor, using the InEight suite. In this flow, the steps of the process are organized into swim lanes for each product.



5.18 CHANGE FREQUENTLY ASKED QUESTIONS

Does an Issue have to progress through the PCO and CCO stages to Create a Budget Change order?

The PCO stage is not mandatory, but to proceed to a budget change order in Control, the CCO stage is required.

Does an issue require a financial impact on the budget to be valid?

No. Issues can be used to record any valid project issue, so that they can be addressed appropriately.

Can I manage the completion of a change order (contract variation) in InEight Change?

A change order (contract variation) can be instigated in InEight Change but the managing of the change order's completion takes place in the InEight Contract application.

How can I recall a CCO in Change?

If the CCO has already completed the approval process, you must modify the CCO Status dropdown to **In review**. This will mark the CCO in Control/Change as **Revised** and the CCO will be placed back into the approval workflow.

Is there a limit on how many cost items/pay items can be executed on a CCO??

Yes, there is a limit in the integration between Change and Control as to how many issues can be associated to a CCO. Currently, users are able to execute a CCO with up to 250 line items.

Can supporting documents be linked from document management?

Yes, when the InEight Document application is set up to integrate, supporting documents can be added from InEight Document directly to an issue or change order in InEight Change.

Can pricing updates performed in a draft CCO automatically be applied to the corresponding issue?

Yes. You can set pricing to update automatically under **Project Settings > Change > Pricing Configuration** or you can update the issue with the CCO pricing changes manually through the Actions menu. See also:

PCO Pricing Tab

Will an executed CCO with budget changes apply those budget changes to Control?

The change record with all its details is sent to the Changes Register in Control for final approval by the person managing the Control budget.

See also:

Approve Contract Adjustment