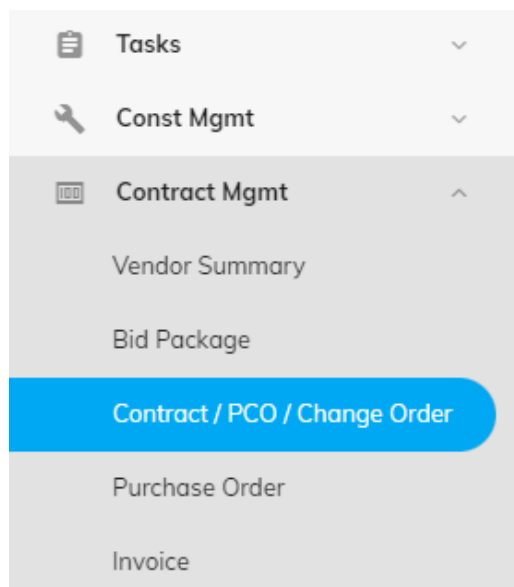


PCOs

1. What is the PCO Feature?

Once a contract has been approved, the awarded to party can create potential change orders (PCOs) against their contract. PCOs provide the paper-trail that leads from an executed contract to a formal change order. PCOs do not directly affect the project budget or contracts, but approved PCOs can be bundled into a change order for final review along with any linked RFIs.

2. Navigation, Filtering, and Sorting the Log Page

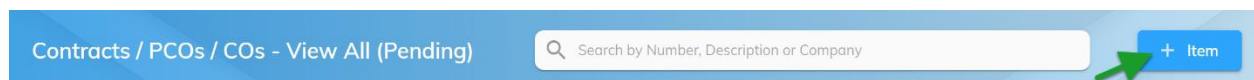


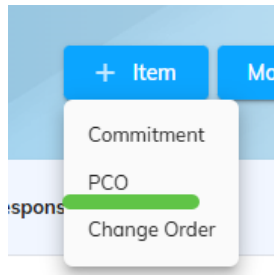
The Contract / PCO/ CO log page can be found in a project by accessing the left-side menu in a project and clicking **Contract Mgmt > Contract / PCO / Change Order**. The log initially shows pending contracts, PCOs and Change Orders; clicking the cyclones next to the **Type** or **Approvals** columns will allow you to filter to specific items (e.g., viewing all PCOs or only approved PCOs).

3. Creating PCOs and Linking to RFIs

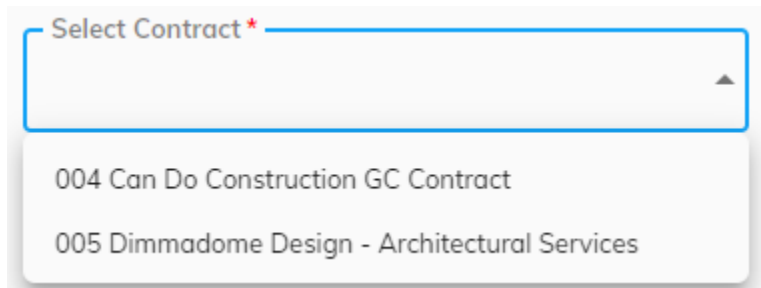
To create a new PCO:

1. Click on the **+ Item** button and select **PCO**.





2. Select the contract that you want to create the PCO against.



3. Add information to the required fields, such as Description, PCO Type, Reason Code, etc. (marked with a red star).

A screenshot of a software interface showing a form titled "Contract - Architect Contract". The form has a blue header bar with tabs: "General", "Items", "Attachments", "Approval", "Comments", and "History". The "General" tab is selected. The form contains several fields, some of which are marked with a red star to indicate they are required. These fields are: "PCO Item #", "Description", "Division", "Select or Type Group", "PCO Type", and "Reason Code". The "PCO Item #" field contains the value "001.007". The "Description" field contains the value "PCO:Architect Contract". The "Division" field contains the value "00000". The "Select or Type Group" field contains the value "2.0 Design". The "PCO Type" field is a dropdown menu with the value "Design Change". The "Reason Code" field is a dropdown menu with the value "Owner Requested". A blue chain-link icon is located in the top right corner of the form.

4. Optionally, click on the chain-link icon to link the PCO to an RFI.
 - a. Select the desired RFI from the drop-down list.
 - b. Click Save and Close to complete this action.

General Items Attachments Approval Comments

Contract 003 - Expense Description Grand Total: \$200.00

Select RFI/Issue Tracker to Link

RFI/Issue Tracker

RFIs - P22.000 : Wood is rotted out; please advise what we should do Type here to select RFI/Issue Tracker

Thread Description	RFI No.	RFI Subject
RFIs	P22.000	Wood is rotted out; please advise what we should do

Close [Save And Close](#)

5. Click on **Save** to save the PCO as a draft or **Save & Next** to continue to the items tab.



6. Add the line items in the **Items** tab.
- To add a new group, click on the **+** on top right of the table (circled in red).
 - To add a new row, click on the **+** by the name of the relevant group.
 - You can also import line items by clicking on the up and down arrow icon (pointed by green arrow).

General **Items** Attachments Approval Comments History

Grand Total: \$0.00

Item # *	Budget Code	Expense Code/Object Code *	Description *	Total Amount *
PCO Items				0.00

On the right side of the table, there are three icons: a red circle with a white plus sign (+), a blue circle with a white up and down arrow icon, and a blue circle with a white right-pointing arrow icon. A green arrow points to the up and down arrow icon.

7. Use **Attachments** tab to add attachments
- Click on the cloud icon or drag and drop desired files in the area.

Attachments

Click or Drag Files

8. When all necessary information has been added to the PCO, use the **Approvals** tab to start approval.

- a. On the Approval tab select an approval from the drop-down menu.
- b. If more than one approval workflow is available, select the one that best describes your PCO.

The screenshot shows the 'Approval' tab of a software interface. At the top, there are tabs for 'General', 'Items', 'Attachments', 'Approval' (which is selected), 'Comments', and 'History'. Below the tabs, there is a card displaying contract information:

Contract 001 - Architect Contract			
PCO Item # 001.007	Description PCO:Architect Contract	Division 00000	
Category 2.0 Design	PCO Type Design Change	Reason Code Owner Requested	Total 25,430.00

Below the card, there is a red warning icon and the text 'The approval process has not started.' To the right of this text are a gear icon and a question mark icon. Below the warning is a dropdown menu labeled 'Select Approval Type' with a hand cursor pointing to it. At the bottom left of the card area is a blue button labeled 'Start Approval'.

- c. Review all information in this tab and click on **Start Approval** to complete PCO submission.

Additionally, you can use the **Comments** tab to add comments that will be visible to those with relevant rights. You can use the **History** tab to view all activity and actions taken on the PCO.