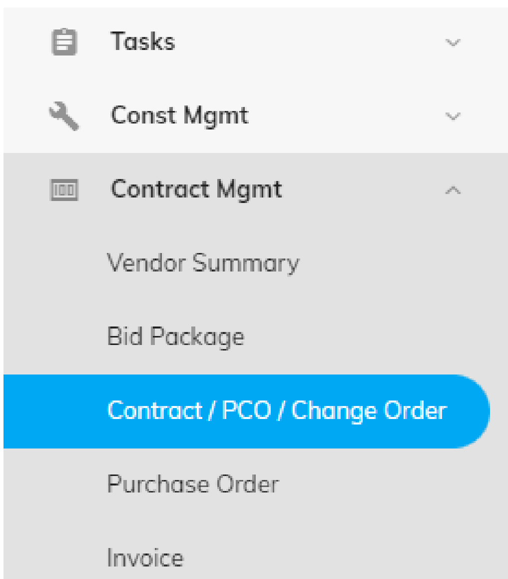
PCOs

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

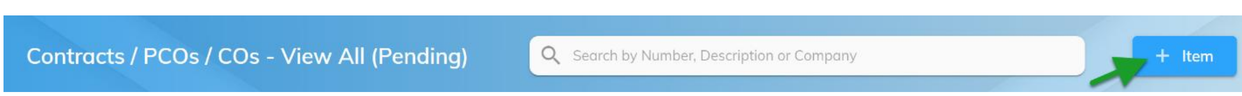


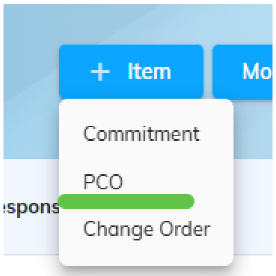
The Contract / PCO/ CO log page can be found in a project by accessing the left-side menu in a project and clicking **Contract Mgmt > Contract / PCO / Change Order**. The log initially shows pending contracts, PCOs and Change Orders; clicking the cyclones next to the **Type** or **Approvals** columns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

3. Creating PCOs and Linking to RFIs

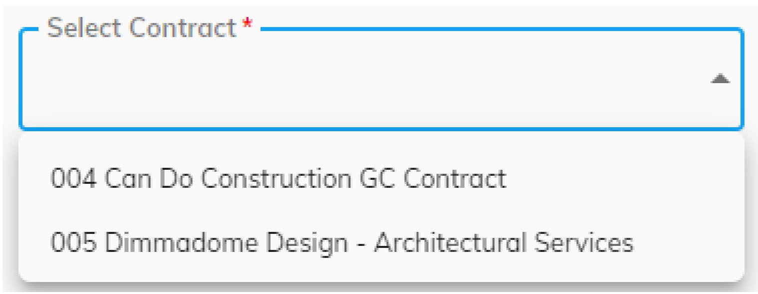
To create a new PCO:

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

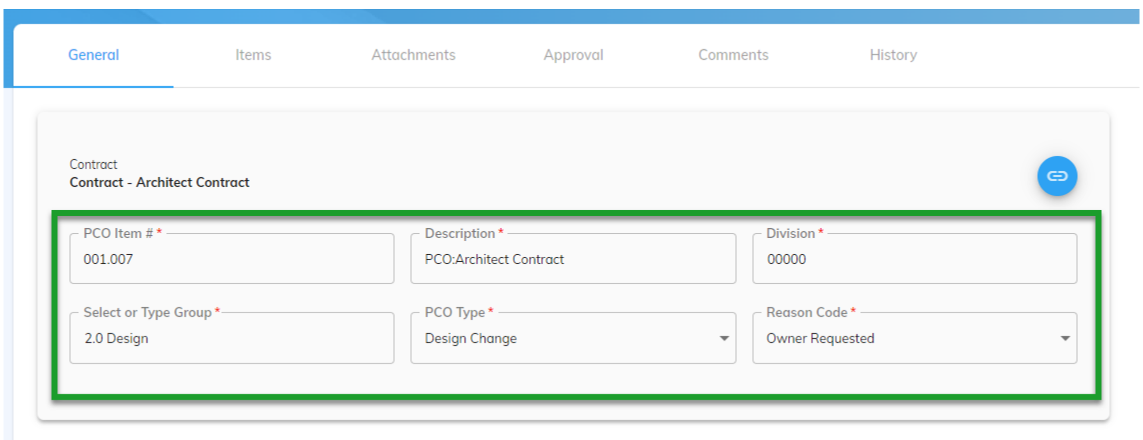




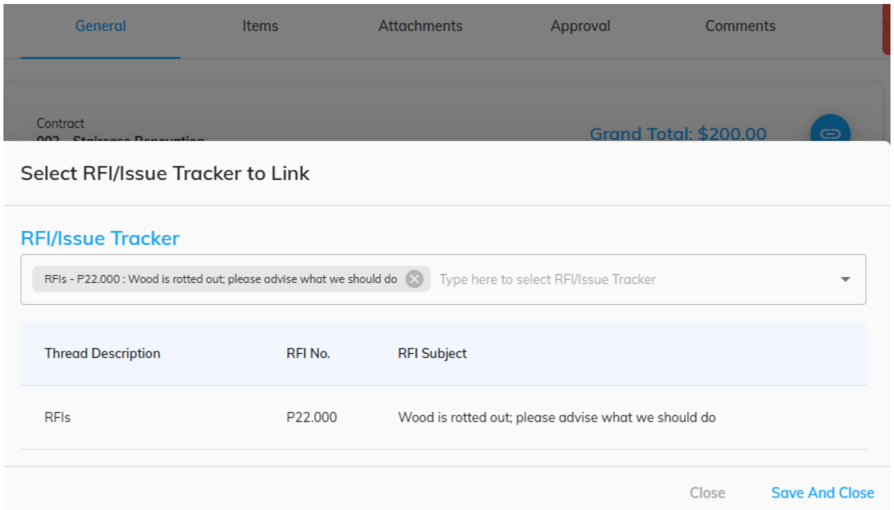
2. Select the contract that you want to create the PCO against.



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

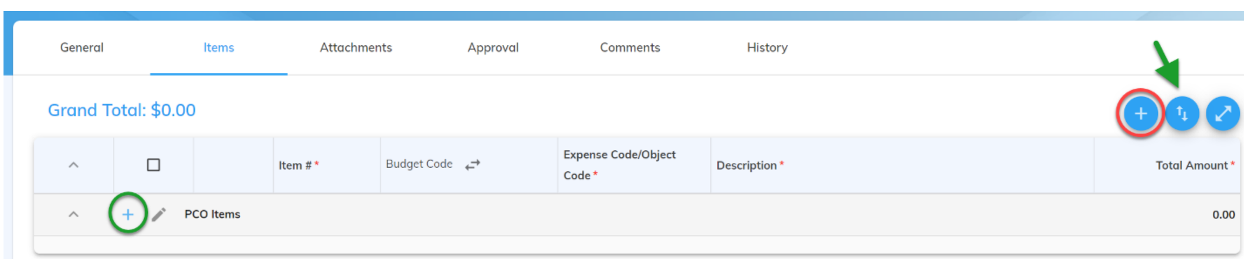


4. Optionally, click on the chain-link icon to link the PCO to an RFI.
    a. Select the desired RFI from the drop-down list.
    b. Click Save and Close to complete this action.

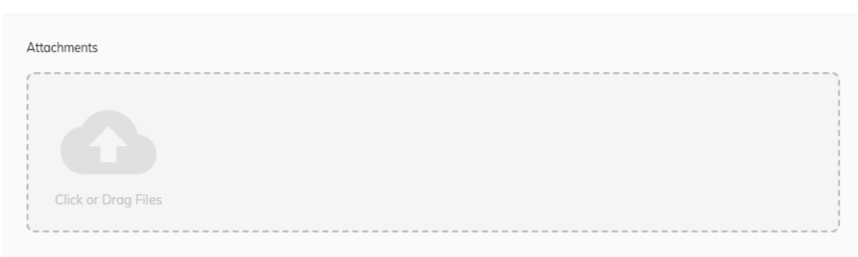


5. Click on **Save** to save the PCO as a draft or **Save & Next** to continue to the items tab.

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

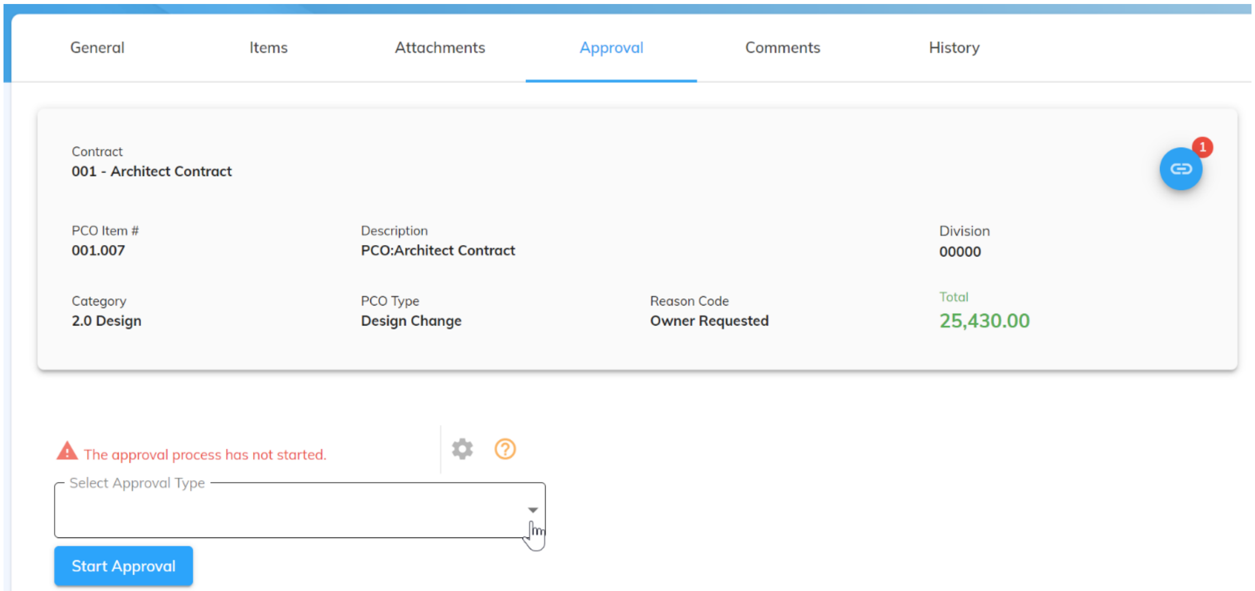


7. Use **Attachments** tab to add attachments
    a. Click on the cloud icon or drag and drop desired files in the area.



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.



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.