

September 9, 2024 Updated September 13, 2024

## e-Builder manual change processing – Campus Guidance (temporary)

Until e-Builder/Workday integrations are functional (target date of October 11, 2024), commitment change processes will need to be processed manually per the below instructions. Campuses are encouraged to schedule individual meetings with Mailor Moua for specific assistance. These meetings should include campus facilities staff as well as the business office personnel responsible for processing changes/payments.

The e-Builder commitment change processes CAM, EADJ, CMRA, PR and CCD will be initiated in e-Builder by the vendor or campus project manager (or support staff) assigned as the e-Builder project administrator (Project Adm). DO NOT forward the commitment change processes into the ISRS Hold step. Follow the steps below:

- 1. When CAM, CMRA, EADJ reaches the PM Verifies Documents and/or Project Manager Review step:
  - a. Review the information and attachments to make sure the change amount is correct.
  - b. Verify that the funding source selected is the Workday funding source that starts with "CC".

		Contract Amendment
Contract Amendment For Signature	contract test project.pdf (version 2)     Properties Download (384.4KB   Redline	

- c. Download the supporting documentation and/or contract amendment in the process.
- d. Project Adm should notify campus finance via email. Include the Project ID, the downloaded supporting document, the Workday funding source(s), PO number and the commitment change number.
- e. Once campus finance completes the entry in Workday, Project Adm should go

into the commitment change process in e-Builder, scroll down to the contract amendment or the DATA section, and enter **True** into the Transaction ID and Success fields. Then take action to move it to the ISRS Hold step. **Continue to move the process out of the ISRS Hold step to the next step.** 

	Contract Amendment
Contract Amendment For Signatures:	
Justification: Vendor Change Proposal:	
Type of Contract being Amended:	
Contract End Date:	
General Liability Insurance Expiration:	Please enter the <b>Expiration Date</b> for the <b>General Liability Insurance</b> policy
Spawn Insurance Tracker:	Insurance Tracker
Transaction ID:	Click Above to Add Insurance Details
Success:	true

- i. For EADJ: after it moves out of the ISRS Hold step, it will go into the Finish step and complete the process in e-Builder.
- ii. For CAM and CMRA: after it moves out of the ISRS Hold step, it will go to the CU Signature step. Once it's out of the ISRS Hold step, follow the normal workflow through each step to allow the correct role to review and act on the step.
- iii. For PR and CCD: since these processes are bundled inside a change order (CO2) process, the Form & Execution Legal reviewer must go into the CO2 process in e-Builder, sign it, and move the CO2 to the next step. This action will automatically forward the PR and/or CCD into the ISRS Hold step.



- Project Adm should notify campus finance via email. Include the Project ID, the downloaded supporting document, the Workday funding source(s), PO number and the commitment change number.
- v. Once campus finance completes the entry in Workday, Project Adm should open the PR and/or CCD in e-Builder, scroll down to the DATA section, and enter **True** into the Transaction ID and Success fields. Then take action and move it out of the ISRS Hold step to the Finish.

	DATA
Date of Issuance:	
Detailed Description:	
Is Construction at Risk Contingency?: 😰	Select "Yes" if this CCD is a Construction Manager at Risk Contingency change. Enter the CCD Amount into the CM@R CCD Amount below.
CM@R CCD Amount:	Enter the CCD Amount.
CCD Disclaimer: 😰	You are hereby directed to make the following change(s) in this Contract: (Descrit information in the alternative)
Schedule Impact (calendar	
days):	
ISRS Approver:	
Transaction ID:	true
Success:	true

2. Follow the steps below to enter the pending commitment change processes in Workday from e-Builder.

**Step 1.** On the Workday homepage, access apps from the Menu or Your Top Apps and select **Buyer Hub**.

	Buyer Hub	
Ê.	Requisitions	
	Supplier Acco	unts
S	Expenses	
B View	All Apps	

**Step 2.** Select **Find Purchase Orders**. Alternatively, enter **Find Purchase Orders** in the search bar and search for the purchase order to change.



**Step 3.** On the Find Purchase Orders page, enter **Company**. Add additional search criteria to filter results, as necessary. Click **OK**.

Find Purchase Orders		]
Company	X CU0302 Lake Superior ⋮≣ College	
Supplier	:=	
Order-From Connection		
Buyer	:=	
Purchase Order Type		
Purchase Order		
Document Date On or After	03/01/2023	
Document Date On or Before	MM/DD/YYYY	
Due Date On or After	MM/DD/YYYY	
Due Date On or Before	MM/DD/YYYY	
Status		
Issue Options		
Contract	:=	
ОК Са	ancel	

**Step 4.** Once the search criteria populate, identify the purchase order and click the **Related Actions** icon. Hover over the **Purchase Order** sub header. Select **Create Change Order**.

Find	5					0 0 0 0 0 0								×	<
, ma	Actions		Purchase	Order									×	PDF	
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٩	PO-0008757	CU0302 La	ke Superior College	Blanket PO	Issued	Print		Gozoz Zapado Pypape		STAPLES & STAPL	ES LLC				

**Step 5.** Provide the **Change Order Reason**. Enter the adjustment amount from the change order (CO2), contract amendment (CAM), encumbrance adjustment (EADJ) and GMP construction change order (CMRA) process from e-Builder into the Comments field in the Change Order Reason section, as shown in the screenshot below.

Create Change O	rder					
Purchase Order PO-000875	eason					
Comments				•		
Summary		✓ Terms and Ta	xes		Contact Information	mation
Company	CU0302 Lake Superior College	Payment Terms	× Net 30 …	:=	Issue Option	× Print ∷≡
Purchase Order Type	× Blanket PO :=	Due Date	MM/DD/YYYY		Buyer *	🛛 🛛 🖂 🖂 🖂 🖂
Supplier	STAPLES & STAPLES LLC	Default Payment Type	SWIFT		Bill-To Contact	🛛 🗙 Gozoz Zapado Pypape \cdots 📰
Order-From Connection	:=	Override Payment Type		:=	Bill-To Contact Detail	Gozoz Zapado Pypape
Currency	USD	Credit Card	(empty)		Bill-To Address	× 42653 Maple Lane Duluth, MN 55811 United States of America
Oberge Order Creation Date	12/05/2023	Shipping Terms	× FOB Destination		Ship-To Contact	X Vydip Pyfozy Zisupu … :=
Change Order Total	45.00	Shipping Method		=	Ship-To Contact Detail	Vydip Pyfozy Zisupu
Tax Amount	0.00	Shipping Instructions		,	Ship-To Address	× 42653 Maple Lane Duluth, MN ∷
Submit	e for Later Cancel					

Enter the e-Builder process number including the PR and/or CCD inside the CO2 process.



**Step 6.** Update the purchase order as necessary. Scroll down to the Service lines. Add a new service order line for the change order by clicking on the plus sign. Enter the change order amount, project, worktags, and any additional information as needed. Click **Done**.

)	Business Document Line Split			Memo	Location	Program	Grant	1	Project
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		-	170,406,10						John Physi Repa
		-							
									-
			6						

**Step 7.** Verify that the total of all the service lines equals the **Line Total Amount** in the Summary area.

Sumn	nary				<ul> <li>Terms and Ta</li> </ul>	ixes		<ul> <li>Contact Information</li> </ul>	mation
npany		CU0076 Metropolitan Sta	ate University		Payment Terms	Net 30		Issue Option	Email
chase Ord	ler Type	(empty)			Due Date	08/16/2024		Supplier PO Issue Email	STACY.PARK@PARAGONRE
plier		PARAGON RESTORATION	N II INC		Default Payment Type	SWIFT		Buyer	Katie Nelson
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rency		USD			Credit Card	(empty)		Bill-To Contact Detail	2
ument Dat	te	08/16/2024			Shipping Terms	FOB Destination		Bill-To Address	@ 700 E. Seventh St. St. Pa
Total Am	ount	187,328.40			Shipping Method	(empty)		Ship-To Contact	(empty)
					Shipping Instructions	(empty)		Ship-To Contact Detail	-
			<u> </u>		Supplier Contract	(empty)		Ship-To Address	700 E. Seventh St. St. Pa
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**Step 8.** Click **Submit**. The change order is now submitted. Once the change order is approved, **the Project Adm (buyer) must issue the purchase order**. It will go to the next person for approval on Workday.