



September 9, 2024

Updated September 13, 2024

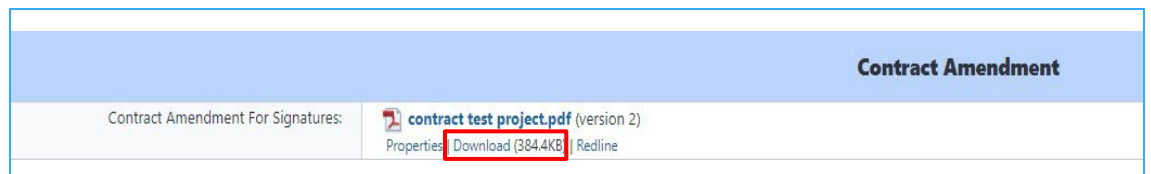
e-Builder manual change processing – Campus Guidance (temporary)

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”.

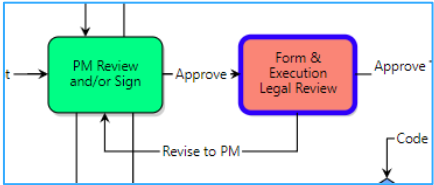


- c. Download the supporting documentation and/or contract amendment in the process.
 - d. Project Adm should notify campus finance via email. Include the Project ID, the downloaded supporting document, the Workday funding source(s), PO number and the commitment change number.
 - e. Once campus finance 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:	<input type="text"/>
Justification:	
Vendor Change Proposal: ?	<input type="text"/>
Type of Contract being Amended: ?	
Contract End Date: ?	
Certificate of Insurance: ?	<input type="text"/>
General Liability Insurance Expiration:	Please enter the Expiration Date for the General Liability Insurance policy.
Spawn Insurance Tracker:	<input type="button" value="Insurance Tracker"/>
	Click Above to Add Insurance Details
Transaction ID: ?	<input type="text" value="true"/>
Success: ?	<input type="text" value="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.

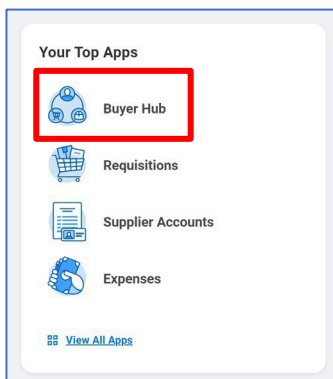


- iv. Project Adm should notify campus finance via email. Include the Project ID, the downloaded supporting document, the Workday funding source(s), PO number and the commitment change number.
- v. Once campus finance completes the entry in Workday, Project Adm should open the PR and/or CCD in e-Builder, 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.

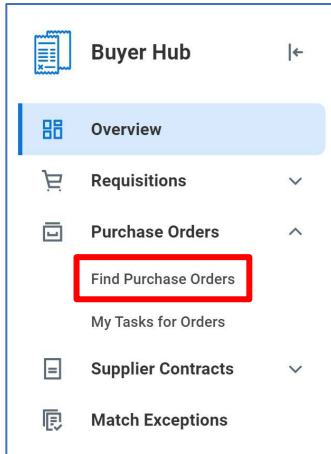
DATA	
Date of Issuance:	
Detailed Description:	
Is Construction at Risk Contingency?: ?	Select "Yes" if this CCD is a Construction Manager at Risk Contingency change. ¹ Enter the CCD Amount into the CM@R CCD Amount below.
CM@R CCD Amount: ?	Enter the CCD Amount.
CCD Disclaimer: ?	You are hereby directed to make the following change(s) in this Contract: (Describe information in the alternative)
Schedule Impact (calendar days):	
ISRS Approver:	
Transaction ID: ?	true
Success: ?	true

- 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**.



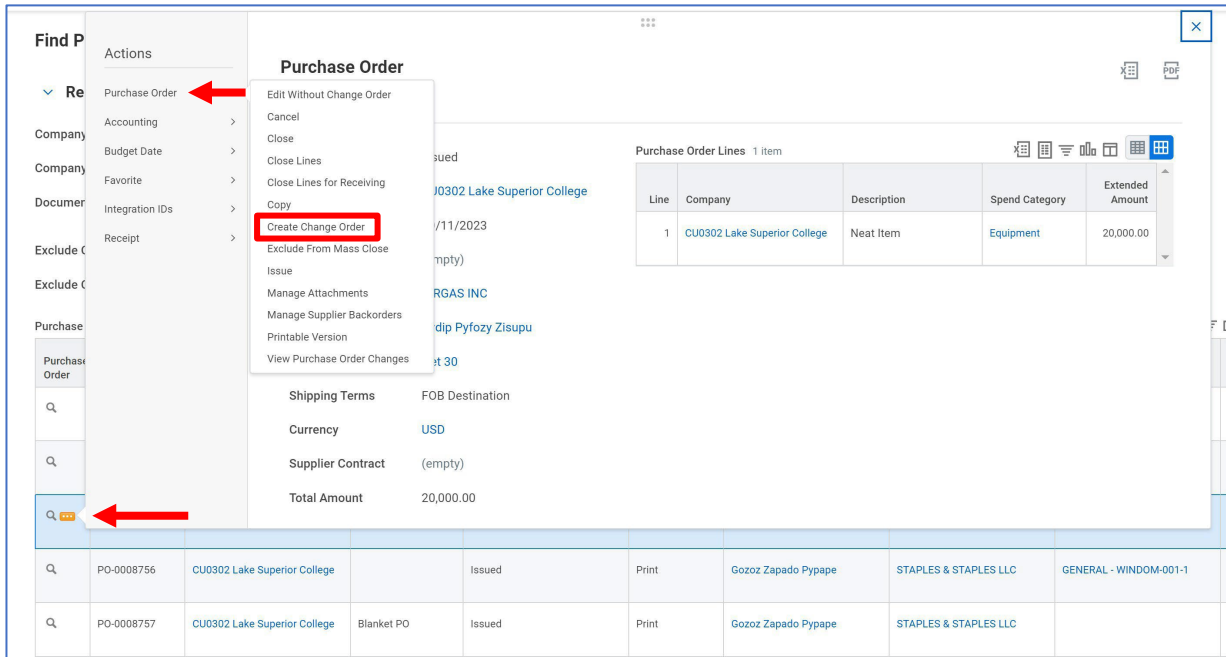
Step 2. Select **Find Purchase Orders**. Alternatively, enter **Find Purchase Orders** in the search bar and search for the purchase order to change.



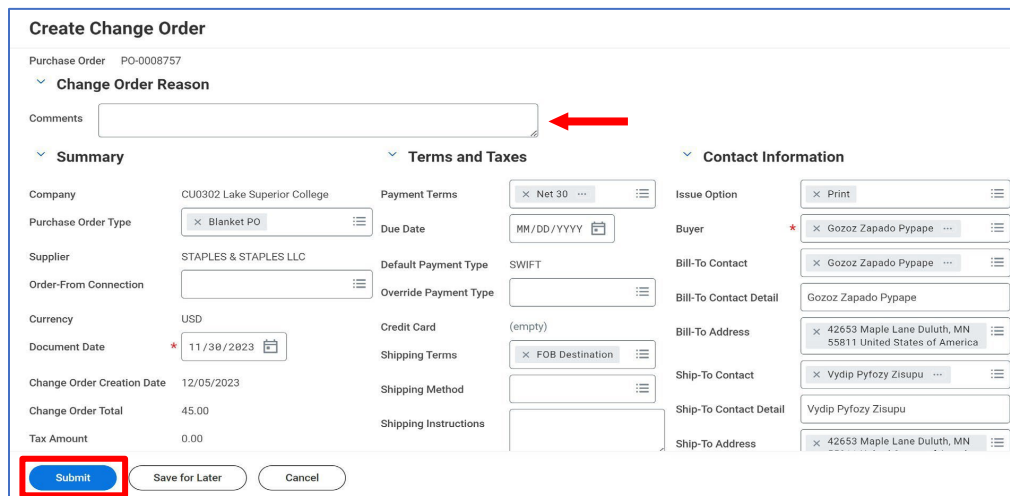
Step 3. On the Find Purchase Orders page, enter **Company**. Add additional search criteria to filter results, as necessary. Click **OK**.

The image shows the 'Find Purchase Orders' search form. The 'Company' field is populated with 'CU0302 Lake Superior College'. A red arrow points to the 'Company' field. The 'OK' button is highlighted with a red box. The form includes fields for Supplier, Order-From Connection, Buyer, Purchase Order Type, Purchase Order, Document Date On or After, Document Date On or Before, Due Date On or After, Due Date On or Before, Status, Issue Options, and Contract.

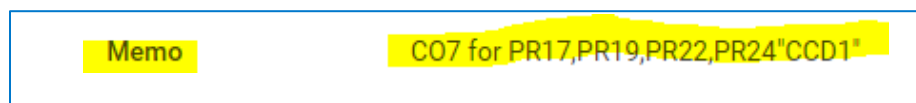
Step 4. Once the search criteria populate, identify the purchase order and click the **Related Actions** icon. Hover over the **Purchase Order** sub header. Select **Create Change Order**.



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.



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**.

Split by: Amount

Builder Line Item: 78,406.10 USD

0.00 USD

Item	Business Document Line Split	Percent	Amount	Memo	Location	Program	Grant	Project
1 Item	UC0596B - Line 2 - 354224	100	78,406.10	CCA - 00001				F00000 METRO Johns Hopkins Physical Repairs

Done Cancel

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

Summary

Company: CU0076 Metropolitan State University

Purchase Order Type: (empty)

Supplier: PARAGON RESTORATION II INC

Order-From Connection: GENERAL - PRIOR LAKE-001-1

Currency: USD

Document Date: 08/16/2024

Line Total Amount: 197,328.40

Terms and Taxes

Payment Terms: Net 30

Due Date: 08/16/2024

Default Payment Type: SWIFT

Override Payment Type: (empty)

Credit Card: (empty)

Shipping Terms: FOB Destination

Shipping Method: (empty)

Shipping Instructions: (empty)

Supplier Contract: (empty)

Contact Information

Issue Option: Email

Supplier PO Issue Email: STACY.PARK@PARAGONRESTI

Buyer: Katie Nelson

Bill-To Contact: (empty)

Bill-To Contact Detail: -

Bill-To Address: 700 E. Seventh St. St. Paul, I

Ship-To Contact: (empty)

Ship-To Contact Detail: -

Ship-To Address: 700 E. Seventh St. St. Paul, I

Memo: (empty)

Internal Memo: (empty)

Service Lines

Service Order Line	Line	Company	Item	Description	Spend Category	Business Document Status	Tax	Tax Recoverability	Tax Option	Amount
1	1	CU0076 Metropolitan State University		Improvements/ Betterments to Buildings	Leasehold Improvements	Invoicing Status Partially Paid	Tax Applicability			Ordered: 108,922.30
							Tax Code			Received: 0.00
										Invoiced: 67,057.02
2	2	CU0076 Metropolitan State University	#Builder Line Item	Improvements/ Betterments to Buildings			Tax Applicability			Ordered: 78,406.10
							Tax Code			Received: 0.00
										Invoiced: 0.00

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.