

# Change Event Quick Reference Guide

November 2019



Prepared for the Mayo Clinic Enterprise Kahua Deployment

# CHANGE EVENT APP OVERVIEW

The Change Event app will allow Mayo Clinic users to track and distribute Owner initiated changes. All or some of Construction Industry Partners (CIPs) on a project can be issued change information based on user decisions. Users can select one or more contracts on the project, send tasks, request, negotiate, and process potential contract adjustment information into a Change Order for each associated contract. The Change Event provides a way to evaluate the total cost of the proposed change across the multiple contracts. CIPs will receive direction and adjustment task requests to provide their proposed adjustments in the Kahua Task app.

The Change Event app is a sub app located in the Expenses app under the Cost Management section. Typically, this application would not be shared with CIPs

Recent	Cost Management	Other
<b>Expenses</b>	S Expenses	See Community
() Getting Started	Funding	EB Contacts
Work Breakdown	MA Master Agreement	File Manager
Funding	Work Breakdown	(U) Getting Started
MA Master Agreement	Document Management	密 Groups
Administration	Communications	Mi Milestones
Company Profiles	Daily Reports	PD Project Directory
Configuration	Field Observations	Projects
Dev Logs	🛞 Meetings	RB Recycle Bin
Domain Settings	Packaged Submittals	
Installed Apps	Punch Lists	
kCreator	D RFIs	
Licenses	Index Management	
PT Project Tasks	SM Site Management	
Share Manager		
Users		
L		

Apps	Proj	ect Finder	Tasks	Messages	\$ xpenses	Getting Started			
Contrac	cts	Change	Events	Change Request	ts C	hange Orders	Pay Requests	Purchase Orders	Invoices

# **CREATING A CHANGE EVENT**

To create a Change Event:

1. Click **NEW** in the Log pane. The Detail pane displays a new Change Event form.

Contracts Change Events   Change Requests Change Orders Pay Requests	Purch	chase Orders Invoices	
NEW REPORTS			<b>×</b>
View: Default • Search All •	⇔	New	New
Number Type Change Event Status Subject Cause of Change Due Date 0 Item(s)			Total Save to Calculate
		Details Project Contracts References	1
		Number 0001	
		Subject	
		Description	
		Change Event Status	
		Туре	
		Cause of Change	
		Originator	1
		Origination Date Select a date 15	
		Responsible Contact Yann Bouzerand - Mayo Enterprise X	
		Due Date 7/21/2018 15	
		Resolved Date Select a date 15	
		noves	
		Save / Close 🔻	· · · · · · · · · · · · · · · · · · ·

The grey bar showing "Total" calculates cost totals upon saving the Change Event (see below)

New		New
	Tota	Save to Calculate

#### 2. Fill out the **DETAILS** section

Note that the fields marked by an asterisk are required to be fill out by Mayo Clinic. The record cannot be saved until all required fields are filled in.

- DETAILS	
Number	0001
Subject	* My new change event
Description	Description of the work goes here

**Number**- Auto-populated field. This field will populate with the next sequential Change Event number.

**Subject**- Required text field. Enter a subject for this Change Event. An example of a subject could be change documents issued by the Design Professional.

**Description**- Text field. Type a Description of the Change Event. If Change Documents (such as an RFP or CCD from the design professional) are stored in file manager this field could indicate which folder they are in for CIPs to retrieve.

Change Event Status	·
Туре	·
Cause of Change	·
Originator	

**Change Event Status**- This is a drop down list. This field should be left "as is". The status will be driven by the workflow.

**Type**- This is required field and a drop-down list. Select the type of Change Request from these choices:

- **Change Directive** Directs the CIP to proceed with the change and requires the CIP to provide any contract adjustments or respond with "no effect".
- **Request for Proposal** Requests the CIP provide contract adjustments prior to the Owner deciding whether or not to proceed with the proposed change after pricing is evaluated.

**Cause of Change**- This is a required field and a drop-down list. Select the appropriate cause of change.

- Field Condition
- Owner Request
- Other (specify)
- A/E Omission

**Originator**- This is a drop-down list of names from the Contacts app. Select the name of the person or group who originated or suggested the Change Event for record purposes. This name does not appear on any subsequent contract document.

Origination Date	Select a date
Responsible Contact	Yann Bouzerand - Mayo Enterprise X
Due Date	<sup>e</sup> 7/21/2018 15
Resolved Date	Select a date
Notes	My notes go here

**Origination Date**- Auto-populated date field. Leave this blank. The origination date will be auto-populated in the workflow. Intended to indicate the date the Change Event originated.

**Responsible Contact**- This field will default the name of the Mayo employee initiating the Change Event. It can be replaced by clicking the "X" to remove the existing value. The drop-down list is populated with names from the Contacts app.

Note that if the name doesn't appear, the user must be added to the contact list through the Contacts app.

**Due Date**- This field is auto populated. It will be defaulted to be +10 days from the day of the creation of the Change Event. If necessary, type in a new date to override the default. It is intended to indicate when a response is due from the CIP.

**Resolved Date**- This field is manually entered when the Change Event to record the date the change event was resolved and final decision made. It does not correlate with when change orders are processed

**Notes**- This is text field. Type any necessary notes about the Change Event. The information only shows in Kahua and does not appear on a task or other document

Fill out the PROJECT CONTRACTS section. This section indicates who the Change Event will be sent to.

- PROJECT CON	ITRACTS					
Items						
Insert 1	item(s) Import I	Expense Contracts				Ø
1		DETAILS		1	EXPENSE	1
	CONTRACT NO	COMPANY	PROPOSAL STATUS		AMOUNT	
		]		•	Save To Calco	ulate

To add contracts to be reviewed for this Change Event to the items grid, select the Import Expense Contracts button. The contract for any CIP that is impacted by the change event should be listed



A pop-up window shows all the contracts from in this Project from the Contract app.

Impo	rt Expense C	ontracts									×
≡	View: Defau								Search All 🔹		۵ 🖨
		P <sup>12</sup>	Workflow Status Approved	-	 Mayo Construction Manager	Quality Reviewer Jim Harrington - Kahua-JM	Company I Kahua-JMH	Vendor Number	Type CM at Risk / Design Build	Agreement Type d Preconstruction Service	Due Date

Note that contracts in the **Approved** and **Submitted** statuses will appear, but only Approved contracts may be selected. Select the contracts that the Change Event may need a response from.

Contracts can be chosen individually by checking the box(es) or

Impo	rt Expense C	ontracts											×
≡	View: Defau	lt 🗸								Se	arch All 🔹	•	۵ 🖨
	C intract No	Date Approved	Workflow Status	Pending With	Mayo Project Manager	Mayo Construction Manager	Quality Reviewer	Company	Contact	Vendor Number	Туре	Agreement Type	Due Date
	0002	11/20/2019	Locked					Kahua-JMH	Jim Harrington - Kahua-JMH		Construction	Master Terms & Conditi	ons 11/27/2019
	0001	11/20/2019	Locked					Kahua-JMH	Jim Harrington - Kahua-JMH		Design	Standalone Agreement	11/27/2019

to include all contracts, check the box at the top to select all the contracts.

Ir	nport	Expense C	ontracts											×
	Search All  Search All											۵ 🖨		
ſ		Contract No	Date Approved	Workflow Status	Pending With	Mayo Project Manager	Mayo Construction Manager	Quality Reviewer	Company	Contact	Vendor Number	Туре	Agreement Type	Due Date
	. (	0002	11/20/2019	Locked					Kahua-JMH	Jim Harrington - Kahua-JMH		Constructio	n Master Terms & Condition	is 11/27/2019
	. (	0001	11/20/2019	Locked					Kahua-JMH	Jim Harrington - Kahua-JMH		Design	Standalone Agreement	11/27/2019

Click **Select** to import the contracts into the Items Grid.

_												
Impo	ort Expense C	ontracts										×
	<ul> <li>View: Defau</li> </ul>	ilt 👻							[	Search All 🔹		۵ 🖨
	Contract No	Date Approved	Workflow Status	Pending With	Mayo Project Manager	Mayo Construction Manager	Quality Reviewer	Company	Contact	Vendor Number	Туре	Agreement Type
	0002	11/20/2019	Locked					Kahua-JMH	Jim Harrington - Kahua-JM	н	Construction	Master Terms & Conditio
	0001	11/20/2019	Locked					Kahua-JMH	Jim Harrington - Kahua-JM	н	Design	Standalone Agreement
_												
						2 Item(s	.)					
												Select Cancel

+ PROJEC	TCONTRACTS					
Items						
Insert	1 item(s) Import Ex	xpense Contracts	1			Ð
	1	DETAILS		I.	EXPENSE	1
	CONTRACT NO	COMPANY	PROPOSAL STATUS		AMOUNT	
□ @	Contract 0002 ×	Kahua-JMH		•	Save To Calculat	e
□ ₫	Contract 0001 ×	Kahua-JMH		•	Save To Calculat	e

4. The **PROPOSAL STATUS** column will be driven by the Workflow. Leave blank.

DETAILS	
COMPANY	PROPOSAL STATUS
Kahua-JMH	•
Kahua-JMH	<b></b>

Note that if the user selects the icon, it will display the detail of the line item. These fields will be filled by the CIPs when the Change Event is sent to them. The Mayo Clinic users do not fill these fields.

	DETAILS
	COMPANY
Contract 0002 ×	Kahua-JMH
Contract 0001 ×	Kahua-JMH

New - Items			×
Insert 1 item(s) Import Expense Contracts	Change Event Item		Previous Next Done
Insert 1 item(s) Import Expense Contracts	Contract No Company Contract Type Affect to Contract Time (days) Delivery Method Proposal Status Amount Insert 1 ilem(s)	Contract 0002 Kabus-JMM X Kabus-JMH Construction Time and Materials Estimate	Provious Not Done Togle between Change Event items  Save To Calculate
Done			

- Use the REFERENCES section to upload documents from the computer by selecting UPLOAD or from the Kahua File Manager by selecting ADD KAHUA DOC. These references do not get sent as attachments to the task.
- 6. Select an option from the Save drop down to save your record.

▼ REF	RENCES									
Refer	ences 🦰									
		D ADD KAHUA DOC	EDIT N	IARKUP UPDA	TE REMOVE DOWNLOAD	ADD COMPOSITE				
TYPE	DESCRIPTION	CONTRIBUTOR	DATE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS	COMMENTS	
Sav	e / Close									



**Save/ New-** Will save the record and will open a blank Change Event in the Detail pane for the user to enter another Change event.

**Save/ Copy-** Will save the record and will open a new Change Event with the same data as in the previous one.

Save/ Close-Will save the record and close the Detail pane (on right side of screen).

Save- Will save the record but leave it open in the Detail pane for continued editing.

Upon saving, the workflow action button **Distribute** is available in front of each contract.

Items								
								Ø
1				DETAILS		1	EXPENSE	1
			CONTRACT NO	COMPANY	PROPOSAL STATUS		AMOUNT	E.
	Distribute	Process	Contract 0002 Kahua-JMH	Kahua-JMH				
	Distribute	Process	Contract 0001 Kahua-JMH	Kahua-JMH				
	Distribute	Process	Contract 0003 CBRE Sandbox	CBRE Sandbox				

Note that the **Process** button is also here but not clickable at this step of the process.

Mayo users can send the Change Event individually by selecting the **Distribute** button next to each Contract, or

			CONTRACT NO	
□ @	Distribute	Process	Contract 0002 Kahua-JMH	K
□ @	Distribute	Process	Contract 0001 Kahua-JMH	K
□ @	Distribute	Process	Contract 0003 CBRE Sandbox	С

they can send the Change Event to all CIPs at the same time by checking the box(es) and select the Distribute button that appear on the top.

- PR	OJECT	CONTRACT	rs				
Item	s						
	Distrib	ute	_				
	ļ			1	DETAILS		1
				CONTRACT NO	COMPANY	PROPOSAL STATUS	1
	Ø	Distribute	Process	Contract 0002 Kahua-JMH	Kahua-JMH		
	Ø	Distribute	Process	Contract 0001 Kahua-JMH	Kahua-JMH		
	Ø	Distribute	Process	Contract 0003 CBRE Sandbox	CBRE Sandbox		

Once the user clicks **Distribute**, a **Recall** button appears, and the **PROPOSAL STATUS** column displays the **Proposal Requested** status.

If the users click on **Recall**, it will pull the task out of the CIPs' Tasks app and change the Recall button back to Distribute.

▼ PRC	DJEC.	T CONTRACT	rs						
Item	s								
									P
				1	DETAILS		1	EXPENSE	1
				CONTRACT NO	COMPANY	PROPOSAL STATUS		AMOUNT	
	₫	Distribute	Process	Contract 0002 Kahua-JMH	Kahua-JMH				
	₽	Distribute	Process	Contract 0001 Kahua-JMH	Kahua-JMH				
	₽	Recall	Process	Contract 0003 CBRE Sandbox	CBRE Sandbox	Proposal Requested	-	-	

Note that in the **DETAILS** section, the Change Event Status field displays the **Distributed** status.

- DETAILS	
Number	0001
Subject	My new change event
Description	Description goes here
Change Event Status	Distributed
Туре	Change Directive
Cause of Change	Owner Request
Originator	Carol Bumbaca - Mayo Enterprise

The Change Event has been sent to the CIP.

# **ANSWERING A CHANGE EVENT AS A CONSTRUCTION INDUSTRY PARTNER**

Note: this section has instructions for Mayo Clinic Construction Industry Partners (CIPs). These steps do not apply to the Mayo Clinic users.

When Mayo Clinic creates a Change Event, distributes it, and provides direction, then CIPs receive an email notification, a message in their Kahua Message app, and a Task Notification in Kahua.

Paul,
PXSP18C0010
SP physical reeducation room
Paul Newman - Newman Construction,
You are being sent a directive for the aforementioned project.
Please proceed per the following:
Pursuant to the Agreement and Article 13 of the General Conditions, a change is directed to occur immediately in the Work.
Please submit acknowledgement of this task within 10 working days to the Owner by providing any corresponding contract adjustments or insight as to when contract adjustments will be available.
Click this <u>link</u> to access your task in Kahua.
This message was automatically generated by the kahua platform. Click here to open this message in kahua.
This e-mail may contain confidential or proprietary information. If you are not the intended recipient, please advise by return e-mail and delete immediately without reading or forwarding to others.

etails Attachmer	nts
ubject	Change Directive for SP physical reeducation room
Paul,	
PXSP18C0010	
SP physical ree	education room
	- Newman Construction,
0	sent a directive for the aforementioned project.
Please proceed	d per the following:
Pursuant to th	e Agreement and Article 13 of the General Conditions, a change is directed to occur immediately in the Work.
	acknowledgement of this task within 10 working days to the Owner by providing any corresponding contract adjustments when contract adjustments will be available.
Click this link to	o access your task in <u>Kahua.</u>



The Tasks app will be used to respond to the Change Event.

1. Select the task in the TASKS app, the Detail pane displays the requested information.

Apps Privect Finder Tasks Messages Expenses Getting Started		•
Active V		
Ť		¥ ¥
NEW SHARE	HISTORY	
E ▼ View: Default ▼ Q	Pricing Request	Task
FROM SUBJECT DATE ASSIGNED DUE DATE	Details Project Contracts	
Beau Esmonde Pricing Request Task 11/20/2019 11/30/2019	Number 0001	
Kailee Olson Project: K1000104 - KO Test 3 Please re 9/17/2019	Subject My new change event	
Kailee Olson Please review the Budget Change Order 9/9/2019	Description Description goes here	
Beau Esmonde Project: K1000004 - BE Test Project Ple 5/14/2019	Change Event Status Distributed	
Beau Esmonde Please review the Contract/PO for BE Te 3/8/2019	Type Change Directive Cause of Change Owner Request	
5 Item(s)	Originator	
	Origination Date	
	Responsible Contact Beau Esmonde - CBRE Sandbox	
	Due Date 11/30/2019	
	- PROJECT CONTRACTS	
	Contract No Contract 0003 CBRE Sandbox	
	Company CBRE Sandbox	
	Contract Type Design	
	Affect to Contract Time (days)	
	Delivery Method -	
	Proposal Status Proposal Requested	
	Amount	
	Insert 1 item(s)	ø
	DETAILS EXPENSE	I.
	NO DESC ACCOUNT CATEGORY ITEM TYPE PROPOSAL TOTAL	1
	Save Submit Proposal Respond No Effect	1

#### 2. Fill out the editable fields.

→ PROJECT CONTRACTS		
Contract No	Contract 0003 CBRE Sandbox	
Company	CBRE Sandbox	
Contract Type	Design	
Affect to Contract Time (days)	34	
Delivery Method	Stipulated Sum	•
Proposal Status	Proposal Requested	
Amount		Save To Calculate
Insert 1 item(s)		<b>B</b>
I	DETAILS	EXPENSE
NO NO	DESC ACCOUNT CATEGORY ITE	M TYPE PROPOSAL TOTAL

Affect to Contract Time (days) – Numeric field. Enter the number of additional project days, if any.

**Delivery Method**- Dropdown list. The CIP should propose an appropriate delivery method for this Change Event and the subsequent scope of work. Mayo will review and will reject if not acceptable.

**Proposal Status**- This field will be driven by the workflow and should not be edited by the user.

**Amount**- This is the Cost Item Grid section. Indicate the work activities and their associated costs for the event. No two dollar amounts should be on the same line. Totals (if any) will calculate upon saving the Change Event.

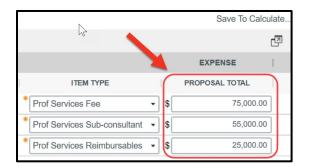
If there is an effect to the contract sum, insert the line items appropriate for the scope of work on the change, enter the number of lines and select **Insert**. If there is no effect to the contract sum, then proceed to the bottom and click **Respond No Effect**.

Amou	unt					Save To Ca	lculate
Ins	ert 3 item(s)						Ø
	1		DETAILS		T	EXPENSE	1
	NO	DESC	ACCOUNT CATEGORY	ITEM TYPE		PROPOSAL TOTAL	
	J * 01 *		*	*	• \$		
	J * 02 *		*	*	• \$		
	🗗 <sup>*</sup> 03 *		*	*	• \$		

3. Enter applicable pricing line items. The **Desc**, **Account Category**, and **Item Type** fields are required as indicated by the orange asterisks. Notice the **Description** field will auto-populate based on the Account Category selected. The description may be edited as necessary. Note: The values in the Item Type drop-down list will vary based on the type of contract.

Amo	unt						Save To Ca	lculate
Ins	ert 3	item(s)						Ø
	I			DETAILS		1	EXPENSE	1
	NO	DESC		ACCOUNT CATEGORY	ITEM TYPE		PROPOSAL TOTAL	
	团 <sup>*</sup> 01	General Cons	truction * .c2	101C2010 General 🗙	* Prof Services Fee	• \$		
	<b>刁</b> <sup>*</sup> 02	Concrete and	Masonry * .c2	101C2030 Concrete ×	* Prof Services Sub-consultant	• \$		
	13 * 03	* Metals	* .c2	101C2050 Metals 🗙	* Prof Services Reimbursables	• \$		
S	Save	Submit Proposal	Respond No Effe	ct				

Input the proposed total cost for each cost item in the **Proposal Total** field. The total Change Event amount will be calculated when the document is saved.



The Cost Status for each line item, found when clicking the More Detail boxes, will be driven by the workflow. Leave the default value.

4. Select between Save, Submit Proposal or Respond No Effect



**Save**- Will save the record and will keep the task active in the Tasks app for future editing. It will not go back to Mayo Clinic until **Submit Proposal** is selected.

Submit Proposal- Will submit the proposal back to Mayo Clinic project team.

**Respond No Effect**- Will indicate Mayo Clinic that this Change Event will have no effect for the CIP through an email notification and a Kahua message notification.

Once the CIP has submitted the proposal, the proposal goes back to Mayo Clinic. From there, Mayo Clinic will accept or reject the proposal.

CIPs will receive an email and a Kahua message to let them know if it has been accepted or rejected.

# ACCEPTING/ REJECTING A PROPOSAL

### Note: This section has instructions for the Mayo Clinic users. These steps do not concern the CIPs.

When the CIP sends back the change proposal to the Mayo Clinic, the Responsible Contact will receive an email and a Kahua message notification.

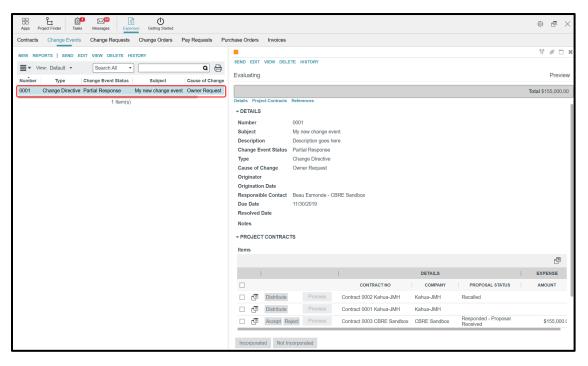
DO To Yann Bou	Dev Outbox New Kahua Message: Change Proposal Response Received for SP physical reeducation room. Izerand	>
Yann,		
Paul has su	ibmitted a change proposal for 0001 My new change event on project SP physical reeducation room.	
蓉	This message was automatically generated by the <b>kahua</b> platform. Click <b>here</b> to open this message in kahua. This e-mail may contain confidential or proprietary information. If you are not the intended recipient, please advise by return e-mail and delete immediately without reading or forwarding to others.	-

Message Detail	
Details Attachments	
- DETAILS	
Received	7/12/2018 3:17 PM
From	Paul Newman - Newman Construction
То	Yann Bouzerand - Mayo Enterprise
Cc	
Subject	Change Proposal Response Received for SP physical reeducation room.
Yann, Paul has submitted a c reeducation room.	change proposal for 0001 My new change event on project SP physical

To act on the Change Proposal from a CIP:

1. Open the Change Event app and select the record in the Log pane.

Note that when at least one (and not all) CIP(s) submit a proposal, the Change Event Status changes to **Partial Response**.



Number	0001
Subject	My new change event
Description	Description goes here
Change Event Status	Partial Response
Туре	Change Directive
Cause of Change	Owner Request
Originator	Carol Bumbaca - Mayo Enterprise

When all the proposals from all CIPs are received, the status changes to **Evaluating**. Indicating that the event is pending Owner action.

Γ	Number	0001
	Subject	My new change event
	Description	Description goes here
(	Change Event Status	Evaluating
	Туре	Change Directive
	Cause of Change	Owner Request
	Originator	Carol Bumbaca - Mayo Enterprise

The line items display two new buttons: Accept and Reject.

The PROPOSAL STATUS column in the line item displays the updated status: **Responded - No Effect** for one CIP and **Responded - Proposal Received** for the other CIP

**Responded** -**No Effect** means that the CIP selected the button **Respond No Effect** to say that this Change Event will not have any effect on their work.

Items				
	I		1	
			CONTRACT NO	1
□ @	Accept Reject	Process	Contract 0003 CBRE Sandbox	
	Accept Reject	Process	Contract 0004 Acme Inc.	

The EXPENSE column displays the total amount of the proposal.

Item	S								
									Þ
				I	DETAILS		- I	EXPENSE	
				CONTRACT NO	COMPANY	PROPOSAL STATUS		AMOUNT	
	Þ	Accept Reject	Process	Contract 0003 CBRE Sandbox	Sandbox	Responded - Proposal Received		\$155,00	0.00
	₽	Accept Reject	Process	Contract 0004 Acme Inc.	Acme Inc.	Responded - No Effect			

2. Select the icon to see the details of the line item concerning the proposal change sent by the CIP.

Items								
								Ø
	1		1	DETAILS		1	EXPENSE	1
			CONTRACT NO	COMPANY	PROPOSAL STATUS		AMOUNT	
	Accept Rejec	Process	Contract 0003 CBRE Sandbox	CBRE Sandbox	Responded - Proposal Received		\$155,00	0.00
	Accept Rejec	Process	Contract 0004 Acme Inc.	Acme Inc.	Responded - No Effect			

ing - Items											_		
					Chang	e Event Item					P	revious Next	Done
	Process Process	CONTRACT NO Contract 0003 CBRE Sandbox Contract 0004 Acme Inc.	PROPOSAL STATUS Responded - Proposal Received Responded - No Effect	AMOUNT	Affect		ne (days)	Contract 0003 CBRE S CBRE Sandbox Design 34 Stipulated Sum	andbox				
					Propo	sal Status		Responded - Proposal	Received			Save To Ca	alculata
					Amou	m							ø
					- 1				DETAILS			EXPENSE	E
							NO	DESC	ACCOUNT CATEGORY	ITEM TYPE	COST STATUS	PROPOSAL TOTAL	d. I
					P	Process	01	General Construction	.C2101C2010	Prof Services Fee	Evaluating	\$75,0	000.000
					Ð	Process	01	Concrete and Masonry	.C2101C2030	Prof Services Sub-consultant			000.000
					ø	Process	01	Metals	.C2101C2050	Prof Services Reimbursables	Evaluating	\$25,0	,000.000

3. Accept or Reject the proposals by selecting the appropriate button.

Items			
	I		
			CONTRACT NO
	Accept Reject	Process	Contract 0003 CBRE Sandbox
	Accept Reject	Process	Contract 0004 Acme Inc.

If accepted, a Process button appears to allow processing of the Change Event into a Change Order



If rejected, a **Request More Info** button appears. When selected, it will send a new Task and a Kahua Message to the CIPs, inviting them to send another proposal. These steps will allow a volley for pricing for the Owner and the CIP.

Note: a comment giving direction must be entered before the Request More Info action can be performed.

4. Once the users have accepted or rejected all of the proposals, select the button **Incorporated** to lock the record and process the Change Event into a Change Order. It is important to wait until all of the Change Events have been processed before incorporating. The Incorporated button will be used for an historic project record and will aid in the searching of project history.



Note that if **Not Incorporated** is selected, the record will lock but will not display the Process button. This function would be used if the Change Event issued as a request for proposal was not executed.

Notice that the top of the page displays the total amount of the proposals that the user has accepted.

Incorporated	Preview
	Total \$155,000.00

# PROCESSING A CHANGE EVENT INTO A CHANGE ORDER

To process a Change Event into a Change Order:

1. Line items must be processed individually by selecting the **Process** button.

Once the Process button is selected, a process window will pop up.

Apps Project Finder Tasks Messages Expenses Cetting Started			۵	e ×
Contracts Change Events Change Requests Change Orders Pay Requests Purchase Order	s Invoices			
NEW REPORTS   SEND VIEW DELETE HISTORY			Ť	0 . *
■ view: Default • Search All • Q	SEND VIEW DELETE HISTORY			
	Incorporated			Preview
Number         Type         Change Event Status         Subject         Cause of Change         Due Date           0001         Change Directive Incorporated         My new change event         Owner Request         11/30/2019			Total \$1	55.000.00
1 Item(s)	Details Project Contracts References		10111 (11	00,000.00
Process		3		
Select target partition and	document type:			
Source	0003 CBRE Sandbox			
Target Application	Expense Change Orders 👻			
Create New				
Add to Existing				
0				
Select copies to include in	references:			
PDF of Initiating down	ument (current state) on the Destination document			
PDF of Destination	document (current state) on the Initiating document			
Select references to inclu	le:			
Туре	Description	Reference Type		Ę۵
			EXPENSE	
			OPOSAL STATUS AMOUNT	
			ccepted \$155,000.00	_
		Cancel Start Processing	ejected	_
		Cancel Start Processing		_
	✓ REFERENCES			
	E I VIEW MARKUP DOWNLOAD			
	TYPE DESCRIPTION CONTRIBUTOR DATE	MARKUP? INCLUDE ON SEND	INCLUDE MARKUP ON SEND IS CURRENT PREVIEW STATUS	COMM
	Unlock			

2. Select **Create New** if it is a new Change Event or Select **Add to Existing** if this Change Event needs to be attached to another one already created.

• Create New	
Add to Existing	

3. By default, the checkboxes under Select copies to include in references are checked.

4. If any references need to be included, they will appear in a list.

Select copies to include in references:					
PDF of Initiating document (current state) on the Destination document					
PDF of Destination document (current state) on the Initiating document					
Select references to include: Type Description	Reference Type				

5. Click on **Start Processing** to process the Change Event into a Change Order.

Cancel	Start Processing

Kahua will automatically switch from the Change Event app to the Change Order app and copy the data into a new Change Order.

Apps Project Finder Tasks Messages Expenses Getting Started	© & ×
Contracts Change Events Change Requests Change Orders   Pay Requests Purchase Orders Invoices	
NEW REPORTS MORE -	■ • 廿 □ ¥
Er View: Default • Search All • Q	Change Order - 0001 New
Contract Number Vendor Change Order Number Description Cost Status References 0 ltem(s)	Prof Services Fee Sovo To Calculate. Prof Services Sub-consultant Savo To Calculate. Subtotal Prof Services Fee Prof Services Sub-consultant Savo To Calculate. Prof Services Reinbursable Savo To Calculate. Total Savo To Calculate. Original Contract Amount Savo To Calculate. Previous Contract Amount Savo To Calculate. Previous Contract Amount Savo To Calculate. Current Contract Amount Savo To Calculate.
	Details Review Items Signatures References
	DETAILS Project Number Project Name Contract  Contract  Contract Signatory Vendor Number Type of Change / Reguest      Tir/02/019      Tir/02/019      Vendor Change Order Number
	Description Description goes here
	Affect to Contract Sum
	Affect to Contract Time 34 Cause of Change
	Cause of Change - Comments
	Save / Close 🔻

Now that the Change Event has been processed as a Change Order, Mayo Clinic users will send the Change Order to the CIPs to get their signature, then the record will go through the Delegation of Authority (DOA) approval process.

DOA is a configurable approval process with limits based on the Change Order amount. Depending of the amount, the Change Order will go through one or more Mayo approvers.

See the Change Order Quick Reference Guide for more information.

# CHANGE EVENT IN THE WORK BREAKDOWN

While the Change Event is going through the DOA process, the values of this Change Event are displayed in the Work Breakdown:

Apps Project Finder Tasks	Messages Expenses Getting Started					
Visit the kStore to explore more than 50 project management apps that work the way you want them to work. Visit the kStore						
Recent	Cost Management	Other				
S Expenses	<b>Expenses</b>	AT Approval Test App				
Licenses	Funding	स्प्रि Bid Management				
Users	MA Master Agreement	Ref Bid Room				
Contacts	Work Breakdown	ବ୍ରିଛି Community				
Configuration	Document Management	E Contacts				
Administration	Communications	File Manager				
Company Profiles	Daily Reports	O Getting Started				
Configuration	Field Observations	瓷 Groups				
Dev Logs	A Meetings	Milestones				
Domain Settings	Punch Lists	Projects				
Installed Apps	D RFIs	Recycle Bin				
Licenses	Submittals	vw Vendor Work Order Management				
Project Tasks	Index Management	WO Work Order Management				
Share Manager	SM Site Management	WP Work Packages				
Users						

Change Event line items in the **Responded** status will appear in the **Pending Commitments** column and the **Potential Committed Amount** Column.

COMMITMENTS Original Commitments Approved Changes Current Commitments Pending Commitments Projected Exposure Potential Committed Amount Balance to Commit Budgeted to Expose

Change Event record in the **Complete Response** Status will appear in the **Project Exposure** column.

COMMITMENTS				
Original Commitments Approved Changes Current Commitments Pending Commitments	Projected Exposure	Potential Committed Amount	Balance to Commit	Budgeted to Exposed

Change Event record in the **Incorporated** status will appear in the **Pending Commitments** column.

COMMITMENTS		<b>×</b>			
Original Commitments Approved Changes Current Commitments	Pending Commitments	Projected Exposure	Potential Committed Amount	Balance to Commit	Budgeted to Exposed

Note: Change Event record in the Not Incorporated will not appear in the Work Breakdown.