



The Change Event tool in Procure is the first step in documenting a change on a project. Any time a change is suspected on a project, it should be documented in the Change Event tool, regardless if it is elevated to a change order or not. From the Change Event tool, the change can be moved along to an Owner PCO or a subcontractor commitment change order.

Purpose:

The purpose of this Standard Operating Procedure is to provide how-to instructions and bring consistencies to how Change Events are created and managed in Procure. Well written Prime Contract or Commitment change orders start at the Change Event level in Procure's multi-tiered system.

Procedure:

- 1) Log into Procure
 - A) Access your Procure account using your login credentials.
- 2) Navigate to the Project
 - A) Select the project in which you want to create and manage change events.
- 3) Access the Change Events Tool
 - A) Find the "Change Events" tool in the project's navigation menu. Click on it to access the tool.
- 4) Create a New Change Events.
 - A) To create a new change event, click on the orange "Create" button in the top right corner within the Change Events tools.
- 5) Fill in General Information:
 - A) Title/Description: A brief and descriptive title for the Change Event
 - B) Status: Set to "Open"
 - C) Origin: Select applicable option (Emails, Correspondence, Meetings, Observations, or RFIs)
 - D) Type: Select applicable option (Allowance, Contingency, Owner Change, TBD, Subcontractor Change or Transfer)
 - E) Change Reason: Select applicable option (Allowance, Back charge, Client Request, Concealed Condition, Design Development, or Existing Condition)
 - F) Scope: Select applicable option (In Scope, Out of Scope, or TBD)
 - G) Prime Contract for Markup Estimates: Always select Prime Contract
 - H) Description: Provide summary-level description of scope change
 - I) Attach Documents: Attach any relevant files, such as drawings, specifications, or photos, subcontractor/supplier change requests, T&M tickets, logs, etc.
- 6) Add Line Items:
 - A) Click the "Add Line" button on the bottom left and fill out the following fields for each line item:
 - i) Budget Code: Select applicable budget code.
 - ii) Description: Provide detailed description of scope change
 - iii) Vendor: Select applicable vendor
 - iv) Contract: This field will auto-populate based on selected Vendor



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- v) Qty: Enter quantity.
- vi) UOM: Enter unit of measure
- vii) Unit Cost: Enter unit cost.
- viii) Cost ROM: This field will auto-populate if calculator icon is selected but will be left blank for manual entry if the triangle exclamation mark icon is selected.