PM4 + Partners Knowledge Articles

Working with Change Documents for Consultants and Design Team

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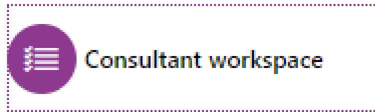
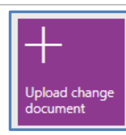
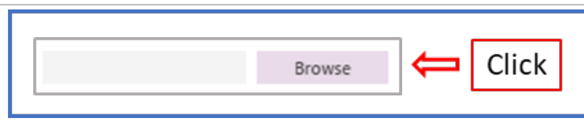
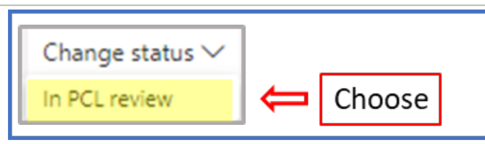
Working with Change documents

In PM4+ the log record holds the descriptive information for the attached change document. It also provides a way to associate, within PM4+, other types of documents and activities required to support and facilitate the change.

Quick Start Guide

What you need to know to get started without delay.

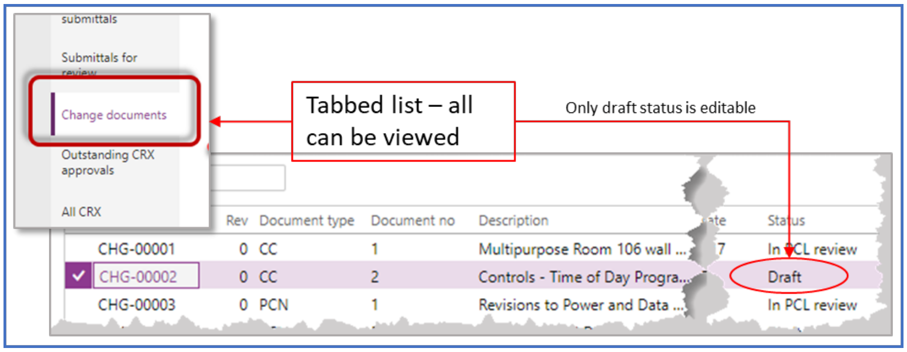
The main action you will take in PM4+ related to Change documents is to create the log records and upload documents that will trigger a change for PCL to act on.

Step	***Action***
Open workspace	
Start record create	
Input header fields	• **Date** – date of document • **Document no** – from the document • **Description** • **Document type** – choose from drop-down • **Action** – indicates how you want PCL to proceed. This may trigger a warning dialog. Review and confirm as necessary.
Upload document	
Confirm create	Select **OK**
Update long description	Optional – complete with any relevant information
Change status	

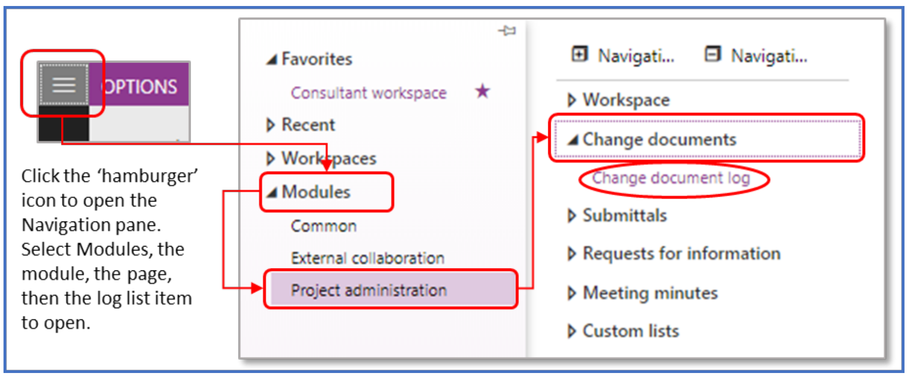
Viewing Change documents

You can view the list of Change document records by selecting the tabbed list **Change documents** from within your workspace, or you can use the navigation pane path **Project Administration** > **Change document** > **Change document**

Tabbed list

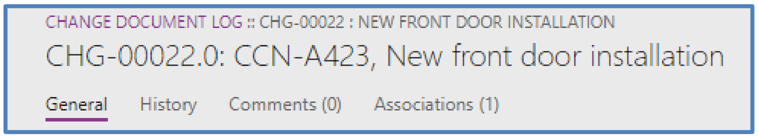


Navigation pane



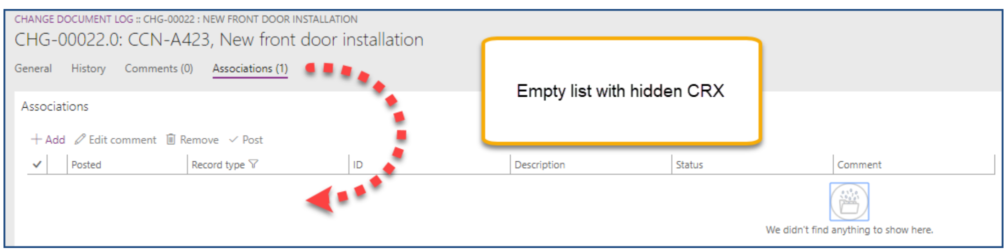
Viewing record details

To view the details of any log record, click the ID link and the details view will open. The change document details pane has four tabs:



Select the tab to view different details about the change document.

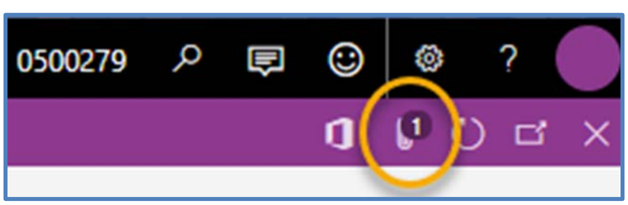
Tab	Displays...
General	Header information about the record
History	Actions and status changes in reverse chronological order - with the latest item at the top of the list Can be sorted to change the order.
Comments	List comments from both internal and external participants
Associations	List of records associated with the change document such as CRXs, RFQs, and RFIs. If there are items under the Comments or Associations tabs, PM4+ shows the number of items in brackets beside the tab label. **Note:** A CRX is counted as an Association; however, you cannot see or access it until it completes the CRX workflow process and is ready for your review.



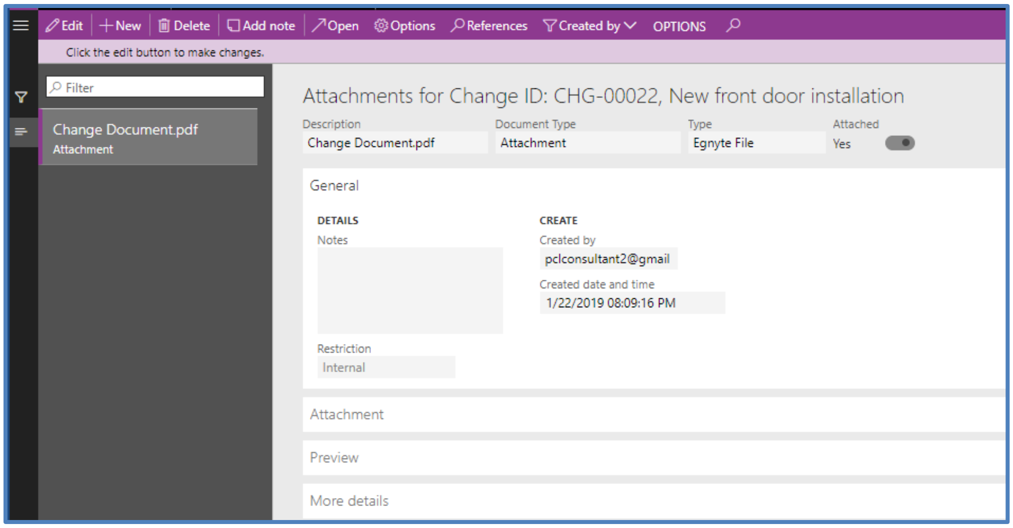
Viewing Attachments

Attachments are files that may be associated with a record in PM4+. To create a change document record in PM4+, a change document is uploaded to PM4+. You can view this document as an attachment to the details view for the document.

From the details view for the change document, select the attachments icon () in the action pane.



The list of attached files for the selected change document displays. This screen provides options for editing the attachment, creating another attachment, or adding notes to the attachment.



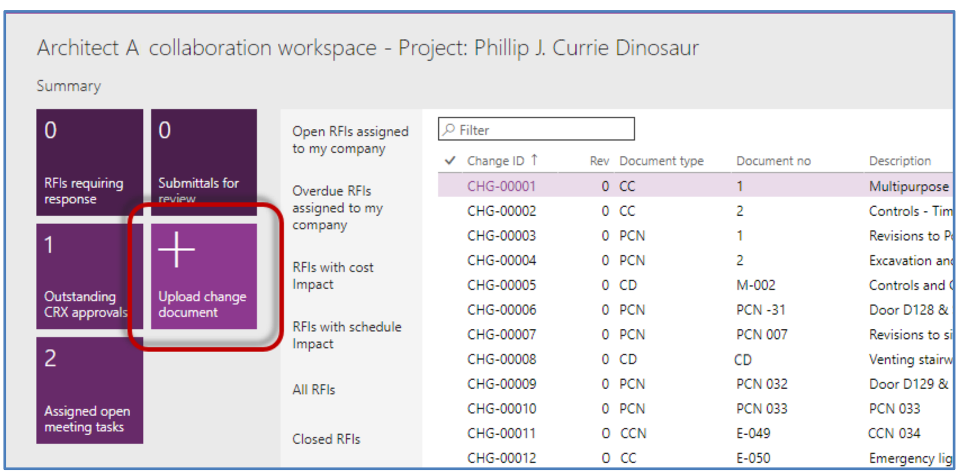
Creating and updating Change Document records

In PM4+ creating a change document log record and uploading your change documents is done through one process. From your workspace you can initiate this process from three different starting points:

- Selecting the action tile **Upload change document** (recommended) or,
- From the navigation pane – **Project Administration** > **Change document** > **Change document** log, choose +**New**,
- From the tabbed list **Change documents** – click ID link of any listed Change document record, choose **+New**.

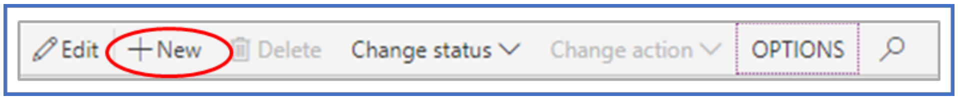
Create and Upload

1. When you choose the action tile **Upload change document** the create process starts immediately.



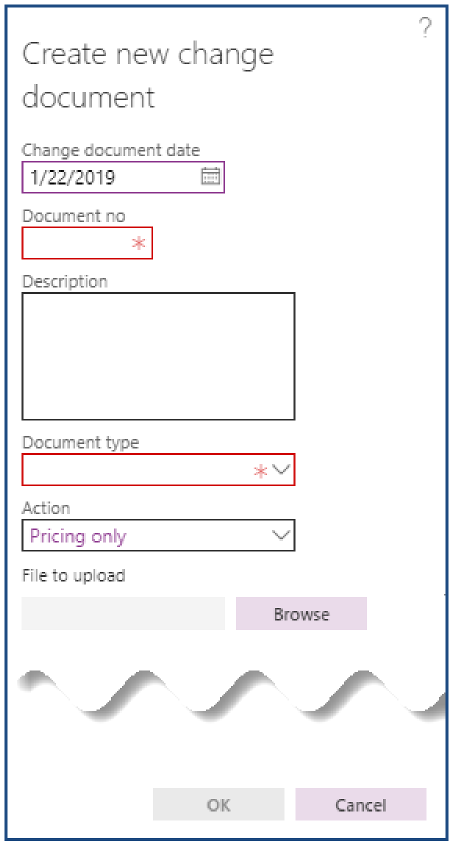
or

If you use either the Navigation pane or the tabbed list method, you must choose **+New** from the action pane when the log list or a record detail is displayed.



The Create new change document dialog opens.

2. In the **Create new change document** dialog that opens complete the following items:



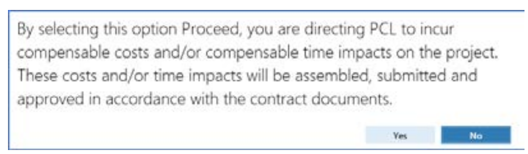
Date The date value defaults to the current date. Input or select the calendar icon to change. This date is the date that the change document was written and will be on the change document.

Document no (number) Enter the document number as found on the change document. **Note**: Mandatory fields are indicated by a red asterisk (*) and red border.

Description Add a short description as found on the change document. This description is also used as the name of the record.

Document type Select value from drop-down list or begin typing until your choice appears and is highlighted, then press **Enter**. Note: Mandatory fields are indicated by a red asterisk (*) and red border.

Action Populates with default as set by the project team. If the action is changed to any type of "Proceed" action, PM4+ displays the following confirmation dialog when OK is selected:



Choose **Yes** to continue with creating the change document; or **No** to cancel. A **No** response returns you to the Create new change document dialog where you can choose to Cancel the 'Create....' process.

File to upload Choose **Browse** and select the file to upload from the Explorer dialog that opens.

3. Click **OK** to create the Change document record or **Cancel** to cancel the create process.

   The system assigns a Change ID number to the record and the change document. The new change document opens with a status of "Draft" and you will be in detail view.

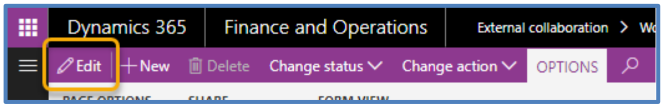
4. Complete the change document details as described below.

Update Change Document details

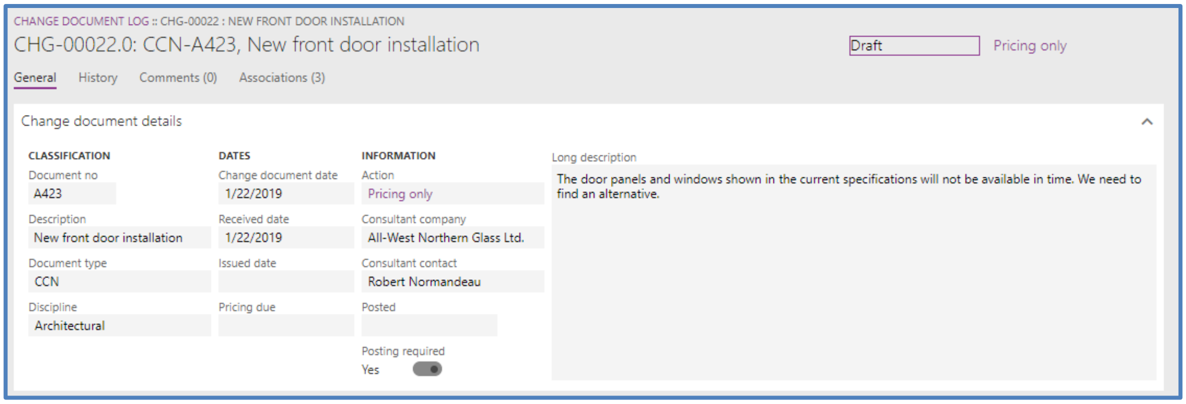
You can only update change documents when they are in the "Draft" status.

1. If you continued here from the previous 'Create….' steps then ensure that you are viewing the record details under the **General** tab otherwise you will have to first reselect and open the record to update.

2. To update a change document record, click **Edit** in the action pane. Once selected, the label for this action button changes to **Save**



3. Select the **General** tab to fill in the header information for the record.



4. In the **CLASSIFICATION** field group, update the **Document type** if needed, and complete the **Discipline** field by selecting a value from the drop-down list.

   Note: These values should match what is found on the change document.

5. Complete the values in the **DATES** field group as required:

Change document date	This field contains the date that was entered when creating the change document record. This date can be edited if required.
Received date	This field must be populated with the date that the change document was received from the consultant/design team/owner/client. This date can be different than the **Change document date**.
Issued date	When the Change document **Status** changes to **Issued**, this field must be populated with the date the status changed. Statuses update when notification is sent to the subcontractors advising them of the change and their required response. This field may be left blank until a **Status** change occurs.
Pricing due	This is the date when the subcontractors need to complete their review of the Change document and provide feedback. If the value in the **Action** field is **Pricing**, a date should be entered into this field.

6. In the **INFORMATION** field group, complete the following fields as **required:**

Consultant company	This list is populated from the Companies that are job contacts for the project.
Consultant contact	If there is only one contact for the consultant company, when the company is chosen, the one contact will automatically populate this field. If more than one contact exists for the company selected, then a list of those contacts will be available in the drop down to be selected from.

7. If the **Posting required** toggle is set to **Yes**, then it sets the values seen in the **Posted** field. If this toggle is set to **No**, the **Posted** field contains a value of **NR** (not required).

8. **(Optional)** Enter more descriptive information about the change in the **Long Description** field.

9. From the action pane, select the **Change Status** and choose In PCL Review.

10. From the action pane, select the **Refresh** button () (top right, a button over from the close button) to display the document with the new status.

    The change document you uploaded is available as an attachment. You can view the document anytime by selecting attachments icon () in the action pane. See Viewing Attachments.