# PM4 + Partners Knowledge Articles

## Working with CRXs for Owners

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January 30, 2019

# Contents

# Working with the CRX Workflow process

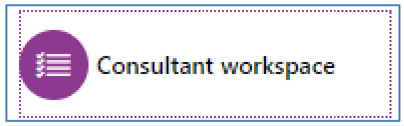
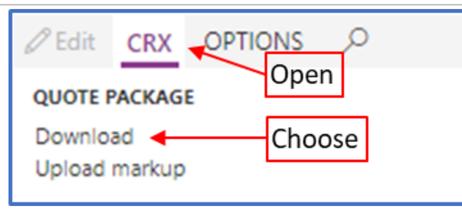
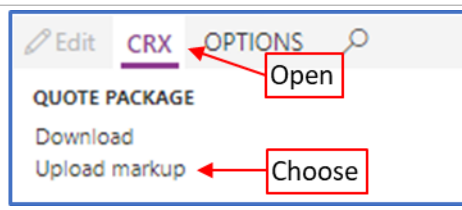
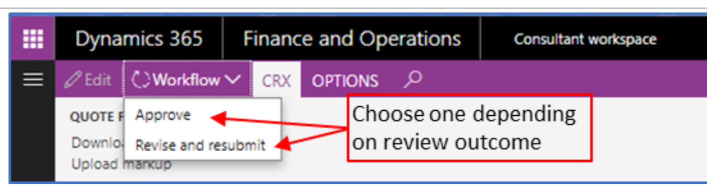
The CRX review and approval process can be performed manually or driven automatically through the Dynamics workflow process. If business processes are automated with the Dynamics workflow, PM4+ responds to an action by a participant in the workflow by moving the workflow to the next step in the process and updating the status. When the status is updated, then the CRX or RFQ is available for the next participant in the workflow to perform their action. When the CRX workflows are enabled, the processes for CRX approval and the RFQ review/approval are managed through the collaboration workspaces for subcontractors and owners rather than through email.

**Note:** The process for approving CRXs is independent of the process for reviewing and approving RFQs so you can have one or the other of these workflows enabled if needed.

# Quick start

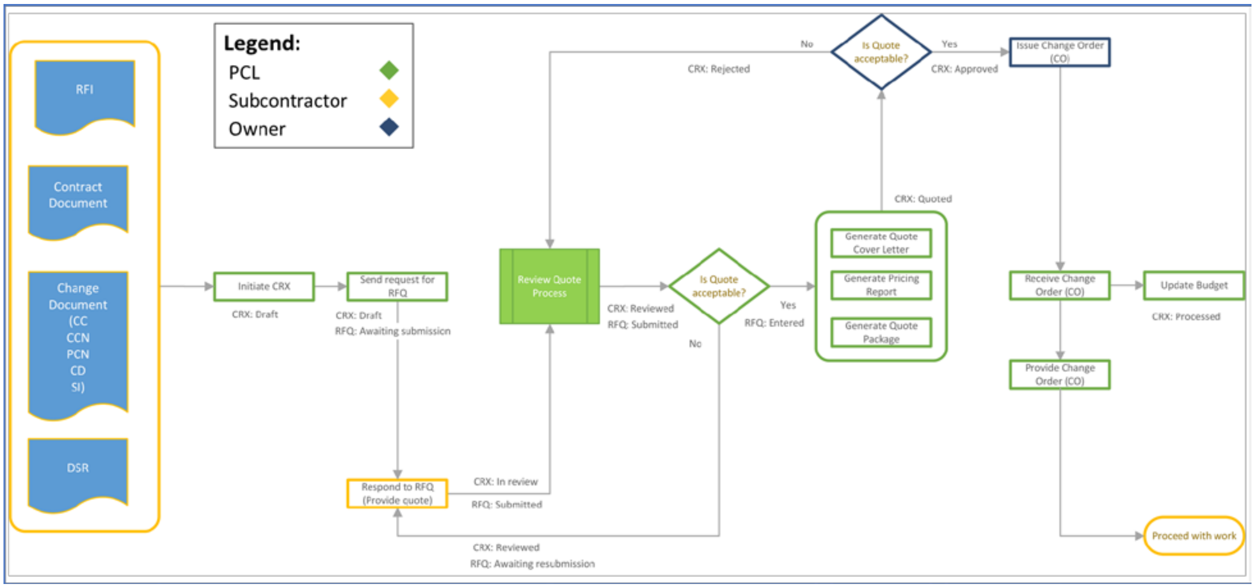
*What you need to know to get started without delay.*

The main action you will take in PM4+ related to CRX documents is to respond to CRXs in quoted status which are assigned to your company.

| ***Step*** | ***Action*** |
|---|---|
| ***Open workspace*** |   |
| ***Go to list of outstanding CRX approvals*** |   |
| ***Select CRX to respond to*** | From list click the CRX record link to open the details view.<br>  |
| ***Download CRX quote package*** |   |
| ***Review*** | Review offline and mark-up CRX package as necessary. |
| ***Upload mark-up*** |   |
| ***Approve or reject CRX*** |  <br>Provide comments about your choice and submit the response. PCL will receive notification of your reviewed CRX and respond accordingly. |

# Overview of the CRX Workflow

The following image shows an overview of the CRX workflow and how the request for quotes review process is integrated with the CRX workflow:




## CRX & RFQ Statuses

**Note:** Once the RFQ is in an "Entered" status indicating that a price has been entered for the estimate line, its status cannot be changed.

| CRX Status | RFQ Status | Handled by ... | Action to take ... |
|---|---|---|---|
| Draft | NA | CRX initiator | CRX created<br>Send request for quote (RFQ) to Subcontractor |
| Pricing | Awaiting Submission | PCL | Wait for quote to return from Subcontractor |
| Pricing | Awaiting Submission | Subcontractor | Generate and send quote back to PCL<br>Status for RFQ changes to "Submitted" |
| Pricing | Submitted | Subcontractor | Wait for response to quote from PCL |
| Pricing | Submitted | PCL | Receive quote from Subcontractor<br>Enter the quoted amount into the CRX; RFQ status changes to "Entered" |
| Internal Review | Submitted or Entered | PCL | Review quote received from subcontractor<br>Once the internal review is complete, PCL changes status to "Reviewed" to indicate the internal review is done. |
| Reviewed | Submitted or Entered | PCL | Determine whether quote is acceptable<br>If quote is acceptable:<br>1. Generate the cover letter |

| CRX Status | RFQ Status | Handled by ... | Action to take ... |
|---|---|---|---|
| | | | 2. Generate the pricing report<br>3. Generate the Quote Package<br>4. Send the Quote Package to the Owner<br>The CRX status changes to "Quoted" and the RFQ status changes to "Entered".<br>If quote is not acceptable, PCL selects "Revise & resubmit" to return the quote to the Subcontractor.<br>The CRX status remains at "Reviewed" and the RFQ status changes to "Awaiting resubmission". |
| Reviewed | Awaiting Resubmission | PCL | Wait for quote to return from Subcontractor |
| Reviewed | Awaiting Resubmission | Subcontractor | Update quote and return to PCL |
| Quoted | Entered | Owner | Review quote received from PCL<br>Determine whether to approve, reject, or cancel the CRX |
| Approved | Entered | Owner | Issue Change Order |
| Approved | Entered | PCL | Receive Change Order from owner<br>Update budget to reflect change in project cost/schedule<br>Provide Change Order to Subcontractor so they can proceed with work |
| Cancelled | Last status before CRX cancelled | | CRX is cancelled; no further work required to update CRX or quote<br>Subcontractor does not proceed with work effort defined in CRX |
| Rejected | | Owner | Wait for response and updates to CRX/RFQ from PCL |
| Rejected | | PCL | Review CRX and associated response to RFQ<br>Return the estimate line to the subcontractor to update or revise their quote (if needed)<br>Make revisions or create a new CRX depending on the response from the consultant/owner |
| Processed | | PCL | Budget update complete<br>When a budget upload that contains a CRX is processed, the CRX status is automatically updated to "Processed"<br>If needed, PCL can manually updates the status to "Processed" when they have associated a processed budget update and received the executed change order<br>Indicates that Subcontractor can proceed with work<br>**Note**: Cannot change status once it is in the "Processed" status |

# Reviewing and responding to CRXs

When PCL completes their review and determines the CRX is acceptable, they generate a quote package for the approval of the project owner or their consultant representative. If the CRX workflow is enabled, the owner or their representative can review and manage the quote package in their collaborative workspace. If the workflow is not enabled, this process is managed manually through emails and email notifications.

You can respond to quotes submitted by the project manager using the collaborative workspace for your company.

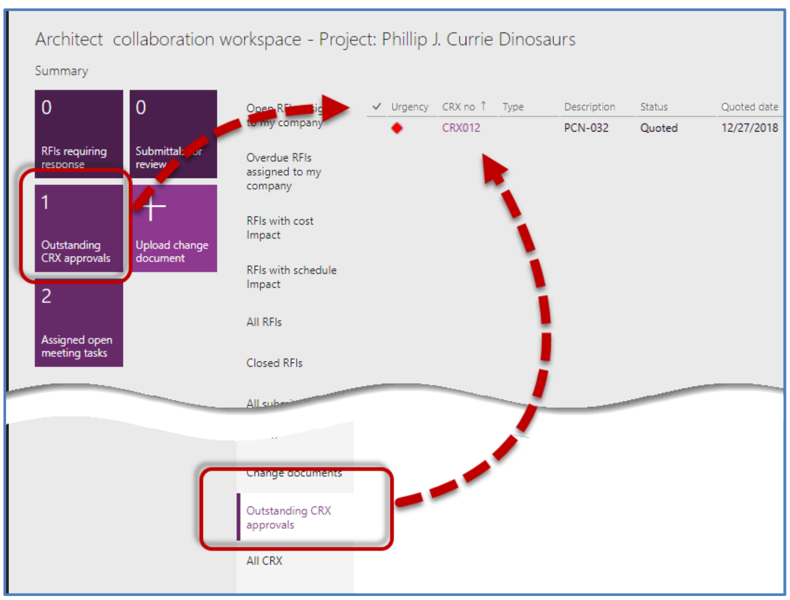
**Note:** You can only interact with CRXs for your company requiring approval (those with a "Quoted" status). These CRXs were completed and submitted by PCL for review and approval.

## Locating outstanding CRXs requiring approval

PM4+ workspace provides two easy ways to access the CRXs requiring Owner review and approval. You can start your review by selecting one of the following:

- Tabbed list for "Outstanding CRX approvals"
- Tile labelled "Outstanding CRX approvals" with a count on it

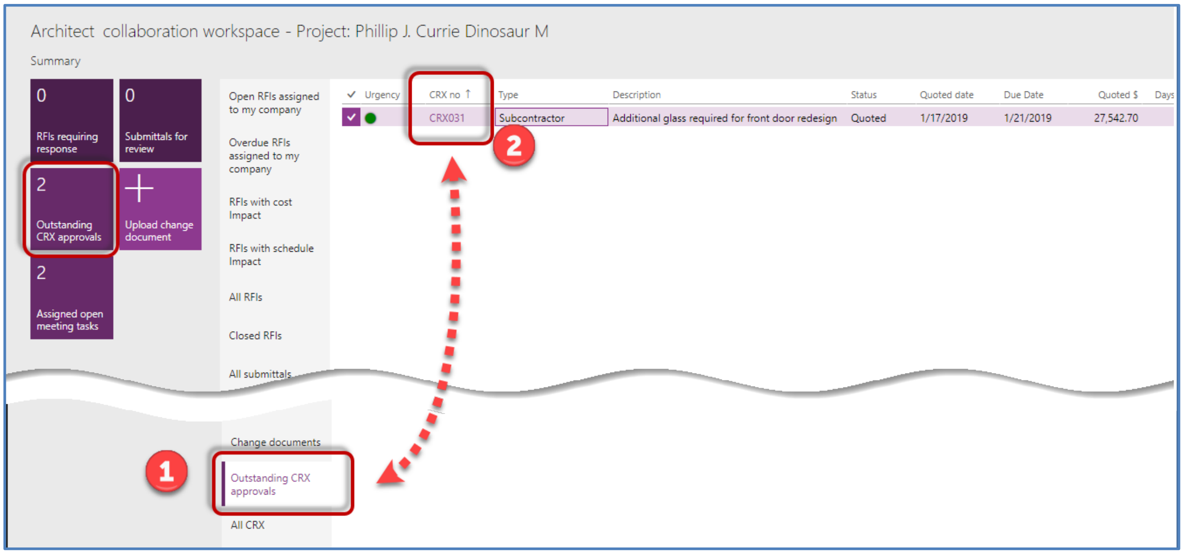
  **Note**: A count tile shows whether there are any items that require action.




The list pane shows the list of outstanding CRXs.

# Reviewing the CRX and the quote package

1. From the list of outstanding CRXs in your workspace, select the **CRX no** link to open the details view for the CRX.




The details view for the selected CRX opens.

**Note:** You cannot make any changes to the information displayed on the details view.

2. Under the **CRX** tab in the action pane, select **Download**

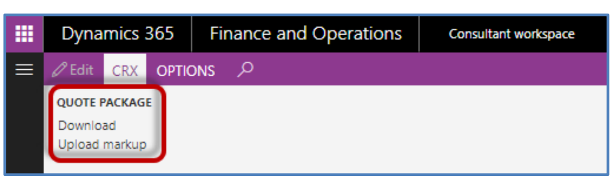
   **Note:** Depending on your browser settings, you may have the option to **Open** or **Save** the package; or the package is downloaded to your **Downloads** folder.

3. If the quote package requires changes, you can mark it up in a PDF editor such as Blue Beam. After the package is marked up, upload the updated package to PM4+ to return it to the Project Manager

# Uploading the quote package

When your review is complete, and you have altered the download package with your markup, you will need to upload the package to PM4+. The system associates the marked-up package with the CRX and makes it available for others to view. If you do not have anything to upload, you can proceed to the next topic **Approving the quote package** or **Requesting a Revise and Resubmit**.

1. If you do not have the CRX record already displayed in detail view, find and open the CRX by clicking the ID link.



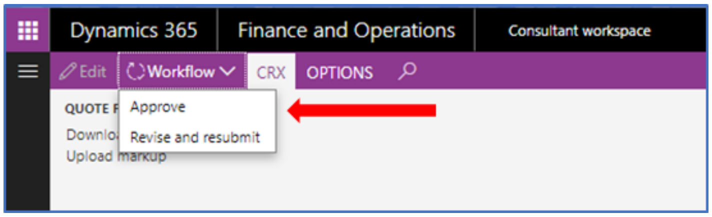

2. From the action pane, select the CRX tab and choose **Upload markup**
   The **Upload document** dialog opens.
3. Select **Choose files** and select the quote package file you reviewed for the CRX.
4. Click **Close** to close the Upload document dialog.

5. Continue to the next step of approving the quote package.

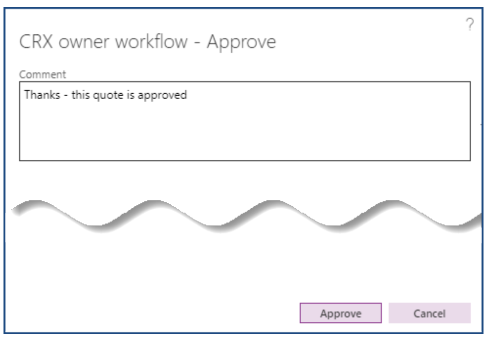
## Approving the quote package

If the quote package is acceptable and you want to approve it, follow these steps:

1. From the action pane, in the **Workflow** drop-down list, select **Approve**



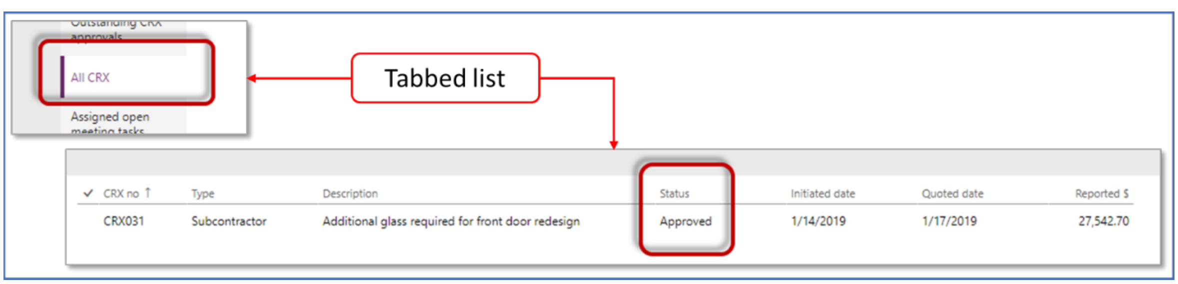

2. The CRX owner workflow - Approve dialog opens.
3. In the **Comment** field, type any notes or comments about the quote package.




4. Click **Approve**

   The CRX is removed from the outstanding CRX approvals lists and the status is updated to "Approved".

   **Note:** You may need to refresh your browser window to see the update. It can take a few minutes to see the new status.

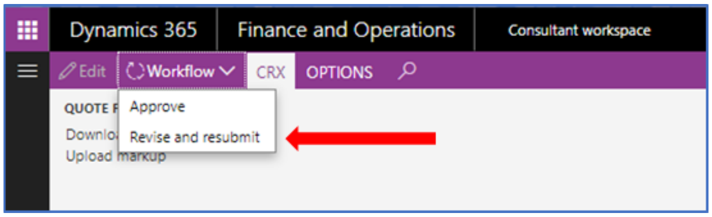



5. If needed, issue a change order for the budget update to proceed with the work.

# Requesting a Revise and Resubmit

If changes are needed to the quote package or you do not agree with the changes proposed, you can return the quote package and CRX to the PCL project manager to update or obtain a new quote from the subcontractor.

1. From the action pane from the **Workflow** drop-down list, select **Revise and resubmit**




   The CRX owner workflow - Revise and resubmit dialog opens.

2. In the **Comment** field, type the instructions for how to update the CRX.
3. Click **Revise and resubmit**

   The dialog closes. The status for the CRX changes to "Rejected". **Note:** It may take a few minutes to see the status change.

   The quote is returned to PCL for their review and response.