Working with CRXs for Owners and Consultants
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Working with the CRX workflow process (collaboration)

PCL uses the term “CRX” refers to changes, requests, and extras which may have a cost or schedule impact to the project.

The process for revising and approving CRXs can be performed manually or driven automatically using PM4+ workflow processes. When the CRX workflows are enabled, the processes for CRX approval and the RFQ review/approval are managed through the collaboration workspaces for owners and consultants rather than through email.

In collaboration, PM4+ responds to an action by a participant in the workflow by moving the activity to the next step in the process and updating the status. When the status is updated, the CRX becomes available to the next participant in the workflow so they can perform their action.
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 assigned to your company.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open workspace</td>
<td>![CRX management (external)]</td>
</tr>
<tr>
<td>Go to list of outstanding CRX approvals</td>
<td><img src="#" alt="Outstanding CRX approvals" /></td>
</tr>
<tr>
<td>Select CRX to respond to</td>
<td>From list click the CRX record link to open the details view.</td>
</tr>
<tr>
<td>Download CRX quote package</td>
<td><img src="#" alt="Open" />, <img src="#" alt="Choose" /></td>
</tr>
<tr>
<td>Review</td>
<td>Review offline and mark-up CRX package as necessary.</td>
</tr>
<tr>
<td>Upload mark-up</td>
<td><img src="#" alt="Open" />, <img src="#" alt="Choose" /></td>
</tr>
<tr>
<td>Approve or return to revise and resubmit CRX</td>
<td><img src="#" alt="Choose one depending on review outcome" /></td>
</tr>
</tbody>
</table>

Provide comments about your choice and submit the response. PCL will receive notification of your reviewed CRX and respond accordingly.
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, 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 PCL.

Uploading the marked up quote package

When your review is complete, and you have altered the download package with your markups, you 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.

Note: If you are requesting PCL to revise and resubmit the quote package, it is recommended that you provide a marked up quote package showing the changes needed.

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 PCL to Revise and resubmit

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

**Note:** It is recommended that you provide a marked-up quote package showing the changes needed.

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

![](image)

**Note:** If a marked up quote package is not available, a confirmation message displays. Select **OK** if a marked up quote package is not provided; or, select **Cancel** to stop the process so you can upload a marked up copy of the quote package.

The CRX owner workflow - Revise and resubmit dialog opens.

2. In the **Comment** field, enter comments that will provide PCL with enough information about what needs to be updated or changed so the package will be acceptable when it is returned.

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.
Delegating the review and response for a quote package

You may want a different consultant to review the quote package and respond to it. In this circumstance, you can delegate the review to another system user.

1. From the action pane from the **Workflow** drop-down list, select **Delegate**

   ![Workflow Delegate](image)

   The CRX owner workflow - Delegate dialog opens.

2. From the **User** drop-down, select the person you want to review and respond to the CRX.
   
   **Note:** This person can be anyone else with the “Consultant” role in PM4+.

3. In the **Comment** field, enter comments that will provide the delegate with sufficient information to complete the review.

4. Click **Delegate**

   The dialog closes. The workflow moves to the new delegate to complete the review and provide their response. You cannot perform any more actions to this CRX.
Viewing the history for a quote package

The history view for the CRX shows the actions that were performed on the CRX and who performed them so it can provide an audit trail or a way to track the progress for the CRX and its quote package.

- From the action pane from the Workflow drop-down list, select View history

The Workflow history screen opens.

The Workflow history screen contains three fast tabs presenting information about the CRX and the quote package:

<table>
<thead>
<tr>
<th>Fast Tab</th>
<th>Displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Information from the header for the CRX</td>
</tr>
<tr>
<td>Tracking details list</td>
<td>List of actions and activities performed on the CRX and quote package with information about who performed the action and a time stamp</td>
</tr>
<tr>
<td>Tracking details</td>
<td>Details for the activities driven by the workflow</td>
</tr>
</tbody>
</table>