



The slide features a laptop icon on the left side, displaying the e-Builder software interface. The interface includes a top navigation bar with tabs: My Home, Dashboard, Projects, Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, and Schedule. The 'My Home' tab is highlighted. On the left, there is a sidebar with sections for Announcements, Events, Recent Pages, and Quick Add. The main content area shows 'My Processes' and 'My Forms' sections, both of which indicate 'No matching records found'. The 'My Processes' section includes a search bar and a 'View' button with options 10, 25, and 50. The 'My Forms' section also includes a search bar and a 'View' button with options 10, 25, and 50. The overall theme is a dark blue background with white text and light blue highlights for buttons and tabs.

e-Builder User Training

Design Change Request (DCR)

Informational How-To Guide



Table of Contents

1 Role and Responsibility Matrix

2 Starting a Process

8 Tracking a Process

17 Approving a Process

21 Contact Information

Role and Responsibility Matrix

The table below outlines the process steps within the workflow and which role is responsible for that specific step.

Section	Process Step	Role	Action
Setup	Start	Initiator	Submit
Review Step	Prime A/E Review (Design) (Projected)	Design-Prime A/E	Reviewed or Revise
	PM Review (Design) (Projected)	DFD PM	Reviewed, Revise, or Void
	BAE Deputy Bureau Director (LAA)	BAE Deputy Bureau Director	Reviewed or Revise
	Financial Specialist Review (LAA)	Financial Specialist	Approve



Note: If you take a Revise action, the process will go back into the DFD PM's court.

**See page 16 for the full workflow view*

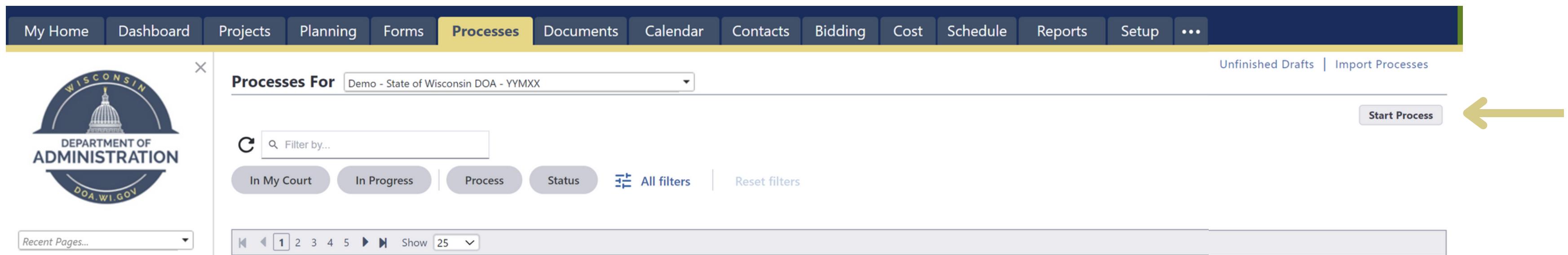
Starting a Process

Design Change Request (DCR)

Processes - Starting a New Process

Design Change Request (DCR)

Once you have searched for and located your project, you can start a new process by clicking the **Start Process** button in the upper right-hand corner of the page.



The screenshot shows the DOA Project Management System interface. The top navigation bar includes links for My Home, Dashboard, Projects, Planning, Forms, **Processes** (which is the active tab), Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, Setup, and three dots for more options. Below the navigation is a search bar labeled "Processes For" with "Demo - State of Wisconsin DOA - YYMXX" selected. To the right of the search bar are links for "Unfinished Drafts" and "Import Processes". The main content area displays a list of processes with various status filters: "In My Court", "In Progress", "Process" (which is selected), "Status", "All filters", and "Reset filters". At the bottom of the content area is a pagination control showing page 1 of 25. On the left side, there is a sidebar with the DOA logo and a "Recent Pages..." dropdown.

 *Tip: There are also alternative methods to starting a process. To review the steps prior to this, see the Processes Tab training.*

Processes - Starting a New Process

Design Change Request (DCR)

Click on the hyperlink for the process you want to start.

Once clicked, a new screen will appear, and you will be directed to a page for the Start step of the workflow.

18 Construction Bulletin (CB)	The Construction Bulletin is issued for the purpose of investigating a potential change in the work. You are requested to review the proposed changes and advise the Architect and Construction Representative of any change in the contract price incorporating any addition, deduction or no change that may result. If the proposed changes are to be made, a Change Order will be issued. Indicate change in Contract Time, if appropriate. This is not a Change Order or direction to proceed with proposed changes
18 Design Change Request (DCR)	The design change request process involves initiating a formal request for changes to the existing design contract. This request documents the proposed changes and any impacts to project scope, required AE services, schedule, or budget. The request is reviewed by DFD, and if approved a change order will be spawned from this process.
18 Field Order (FO)	The field order process involves a request for change or additional work that is minor in nature or an emergent situation. This is a directive to proceed with the work immediately. Provide pricing within 10 days from notification. A change order will be spawned from this process.



Note: For this guide, the Design Change Request (DCR) example will be shown on the following pages.



Processes - Starting a New Process

Design Change Request (DCR)

For the DCR process, you will see the necessary fields in the Details tab. Fields with an asterisk (*) are required and must be completed.

e-Builder instructions are highlighted in blue within the setup screen.

Note: to see additional instructions or helpful tips for certain fields, hover over the “ ? ” icons.

18 Design Change Request (DCR)

Start Process

Project:	Demo - State of Wisconsin DOA
Project Number:	YYMXX
Process:	18 Design Change Request

Print Check Spelling Submit Save Draft Cancel

Details Documents (0) Attached Processes (0) Attached Forms (0) Expand All | Collapse All

Design Change Request

If supporting documents or files need to accompany this process, please use the [Documents] tab to upload the files.

If there is a cost impact, enter that information here.

* Brief Description of Scope:

* Is this a change to the reimbursable or LAA only?: Yes No

Proposed Opinion of Cost:

Fee Proposal: Drag and drop file here or Browse Computer Browse e-Builder

Print Check Spelling Submit Save Draft Cancel

Processes - Starting a New Process

Design Change Request (DCR)

If supporting documents or files need to be attached to the process, use the Documents tab to upload the files.

Enter the remaining information in the required fields. To attach a fee proposal, either drag/drop the file into the designated space or click the **Browse Computer** or **Browse e-Builder** button to select the file.

Design Change Request

If supporting documents or files need to accompany this process, please use the [Documents] tab to upload the files.

If there is a cost impact, enter that information here.

<p>* Brief Description of Scope:</p> <p>Test</p>	<p>* Is this a change to the reimbursable or LAA only?: ?</p> <p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p> <p>Proposed Opinion of Cost: ?</p> <p>100</p> <p>Fee Proposal:</p> <p>Drag and drop file here</p>
<p>or</p> <p>Browse Computer</p> <p>Browse e-Builder</p>	

Processes - Starting a New Process

Design Change Request (DCR)

Once all the information has been entered, you can choose to either Submit or Save the draft.

Save Draft

If you are not ready to submit the form, click the **Save Draft** button to save and return to the form at any time.

Design Change Request

If supporting documents or files need to accompany this process, please use the [\[Documents\]](#) tab to upload the files.

If there is a cost impact, enter that information here.

<p>* Brief Description of Scope:</p> <p>Test</p>	
<p>* Is this a change to the reimbursable or LAA only?: ?</p> <p>Proposed Opinion of Cost: ?</p> <p>Fee Proposal:</p> <p>100</p>	<p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p> <p>Drag and drop file here or Browse Computer Browse e-Builder</p>

[Print](#) [Check Spelling](#) [Submit](#) [Save Draft](#) [Cancel](#)

Submit

If you are ready to submit the form, click the **Submit** button and the form will be moved to the next step in the workflow. The system will move the action to the next person's court and assign a number to it.



Tracking a Process

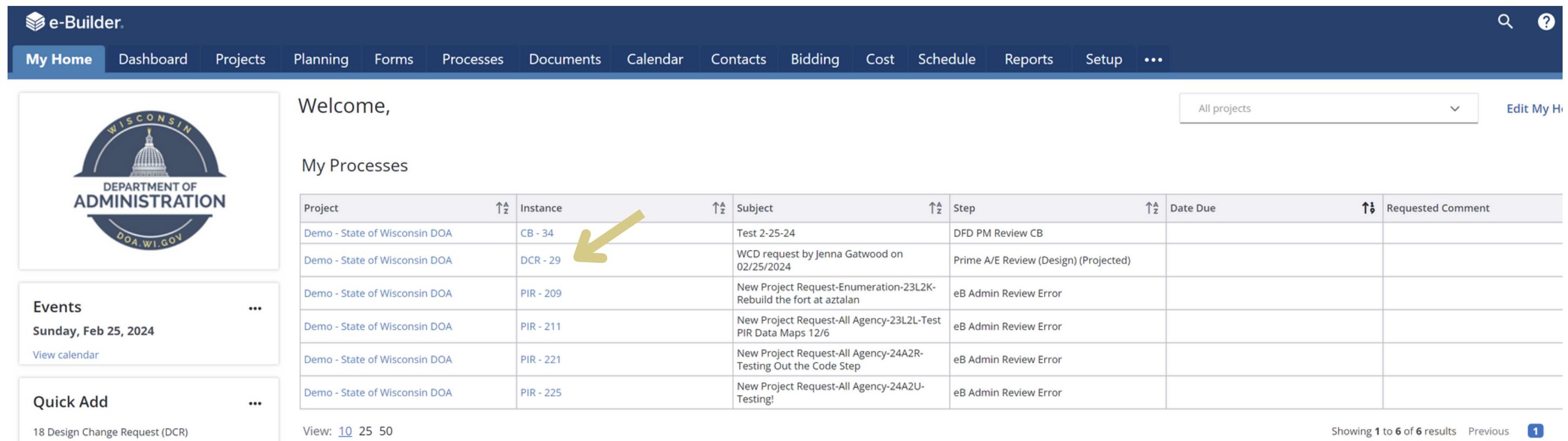
Design Change Request (DCR)

Processes in Your Court

Design Change Request (DCR)

When a process lands in your court, you will see it under the My Processes section. Having items in the My Processes section indicates that the item is in your court to review and approve before it can move forward in the workflow.

You can open the process by clicking on the process item's numbers. When clicked, the instance will open.



The screenshot shows the e-Builder software interface with a dark blue header and a white content area. The header includes a logo, a search bar, and a 'My Home' button. The main content area has a 'Welcome' message and a 'My Processes' section. The 'My Processes' section is a table with the following data:

Project	Instance	Subject	Step	Date Due	Requested Comment
Demo - State of Wisconsin DOA	CB - 34	Test 2-25-24	DFD PM Review CB		
Demo - State of Wisconsin DOA	DCR - 29	WCD request by Jenna Gatwood on 02/25/2024	Prime A/E Review (Design) (Projected)		
Demo - State of Wisconsin DOA	PIR - 209	New Project Request-Enumeration-23L2K-Rebuild the fort at aztalan	eB Admin Review Error		
Demo - State of Wisconsin DOA	PIR - 211	New Project Request-All Agency-23L2L-Test PIR Data Maps 12/6	eB Admin Review Error		
Demo - State of Wisconsin DOA	PIR - 221	New Project Request-All Agency-24A2R-Testing Out the Code Step	eB Admin Review Error		
Demo - State of Wisconsin DOA	PIR - 225	New Project Request-All Agency-24A2U-Testing!	eB Admin Review Error		

At the bottom of the table, a yellow arrow points to the 'Instance' column of the second row, which contains the value 'DCR - 29'.

Processes in Your Court

Design Change Request (DCR)

When you open the process, you will see a section that says "Current Workflow Step." Next to that, you will see the current step that the instance is in.

In the example on the right, the instance is shown in the "Prime A/E Review (Design) (Projected)" step.

18 Design Change Request (DCR) - 29

Accept		Decline		Delete Instance		Workflow Override		All Fields View	
				-- Please select an action --		Take Action			
Project:	Demo - State of Wisconsin DOA		Process Document:	DCR - 29		Project Number:	YYMXX		
	Show History Current Actors					Overall Due Date:			
Current Workflow Step:	Prime A/E Review (Design) (Projected)		Subject:	Show Workflow Diagram		Step Due Date:			
			Status:	WCD request by Jenna Gatwood on 02/25/2024					
				Submitted					



Tip: If you were to click on the "Show Workflow Diagram" link, it will open a visual of the current workflow steps.

Processes in Your Court

Design Change Request (DCR)

See below for more information about key features to know:

Project

The name of the Project. This example is for the Demo account.

Show History

A link to show the history. When clicked, a new page will appear.

Process Document

The document and process counter. Each process is assigned a unique number when submitted.

Current Actors

This shows the person who has the process in their court. This person is currently responsible for reviewing/approving the item.

18 Design Change Request (DCR) - 29

Accept **Decline**

Project: Demo - State of Wisconsin DOA
Process Document: DCR - 29
Show History | Current Actors

Current Workflow Step: Prime A/E Review (Design) (Projected) Show Workflow Diagram
Subject: WCD request by Jenna Gatwood on 02/25/2024
Status: Submitted

Processes in Your Court - Show History

Design Change Request (DCR)

If you click the **Show History** hyperlink, a new window will pop-up in the Routing History tab. This tab is going to show you every step in the workflow, if someone acted on the process (anytime someone reviewed it or approved it) and what happened.

In the photo, you can see every step in the workflow that this process has gone through, who the actor was on each of those steps, the action that was taken at each of those steps, the date that it was completed, and how many days it was in that step before it was acted on. You can also view the status of each step as it progresses from one step to the next.



Routing History

Details

Name:	DCR - 29
Status:	Submitted

Steps

#	Step Name	Actor	Action	Due Date	Completed	Age(d)	Status
1	Start	Jenna Gatwood	Submit		02.25.2024 06:34 PM		Completed
2	LAA/Reimburse Only?		false		02.25.2024 06:34 PM	0	Completed
3	PM Start?		true		02.25.2024 06:34 PM	0	Completed
4	Prime A/E Review (Design) (Projected)	Current Actors..				0	In Progress

Processes in Your Court - Show History

Design Change Request (DCR)

If you scroll down on the same screen, you can see all the different data fields. These are the data fields that were completed when the process was started. The data fields are on the first column, then you will see who edited the information within that data field, the date that it was edited, and, on the right side of the screen, you can see the values that were entered.



Data Field	Edit User	Edit Date	Old Value	New Value
Subject	Jenna Gatwood	02.25.2024 06:34PM		[No Subject]
Brief Description of Scope	Jenna Gatwood	02.25.2024 06:34PM		Test
Is this a change to the reimbursable or LAA only?	Jenna Gatwood	02.25.2024 06:34PM		No
PM Start?	Jenna Gatwood	02.25.2024 06:34PM		Yes
Proposed Opinion of Cost	Jenna Gatwood	02.25.2024 06:34PM		100.00
Subject	Jenna Gatwood	02.25.2024 06:34PM	[No Subject]	WCD request by Jenna Gatwood on 02/25/2024

If any changes are made to these data fields, as it moves through the workflow, you will be able to see what the old information was, what the person updated it to, and what the new information is.

Processes in Your Court - Show History

Design Change Request (DCR)

At the top of the page, if you click on the History tab, you can see if/when someone looked at that specific process.

This tab can be used as a form of accountability if something is changed by accident.

History

Routing History History 

Details

Name:	DCR - 29
Status:	Submitted

History

Name	Company	Time Stamp	Step Name	Access	Description
Gatwood, Jenna	Avicado	02.25.2024 6:40 PM	4 - Prime A/E Review (Design) (Projected)	View	
Gatwood, Jenna	Avicado	02.25.2024 6:35 PM	4 - Prime A/E Review (Design) (Projected)	Workflow Override - Add Actors	
Gatwood, Jenna	Avicado	02.25.2024 6:35 PM	4 - Prime A/E Review (Design) (Projected)	View	
Gatwood, Jenna	Avicado	02.25.2024 6:35 PM	1 - Start	View	
Gatwood, Jenna	Avicado	02.25.2024 6:34 PM	1 - Start	Created	Process Instance Submitted
Gatwood, Jenna	Avicado	02.25.2024 6:34 PM	1 - Start	Draft Created	

Print 

Print 

Processes in Your Court - Current Workflow

Design Change Request (DCR)

To view the process workflow, click on the **Show Workflow Diagram** hyperlink (shown in the image) from the specific process page.

This will prompt a pop-up screen with the entire workflow (shown on the next page).

18 Design Change Request (DCR) - 29

<input type="button" value="Accept"/>	<input type="button" value="Decline"/>	<input type="button" value="-- Please select an action --"/>	<input type="button" value="Take Action"/>	<input type="button" value="Check Spelling"/>	<input type="button" value="Print"/>	<input type="button" value="Copy"/>	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
Project:	Demo - State of Wisconsin DOA							
Process Document:	DCR - 29							
Show History Current Actors								
Current Workflow Step:	Prime A/E Review (Design) (Projected) Show Workflow Diagram							
Subject:	WCD request by Jenna Gatwood on 02/25/2024							
Status:	Submitted							
Project Number:	YYMXX							
Overall Due Date:								
Step Due Date:								



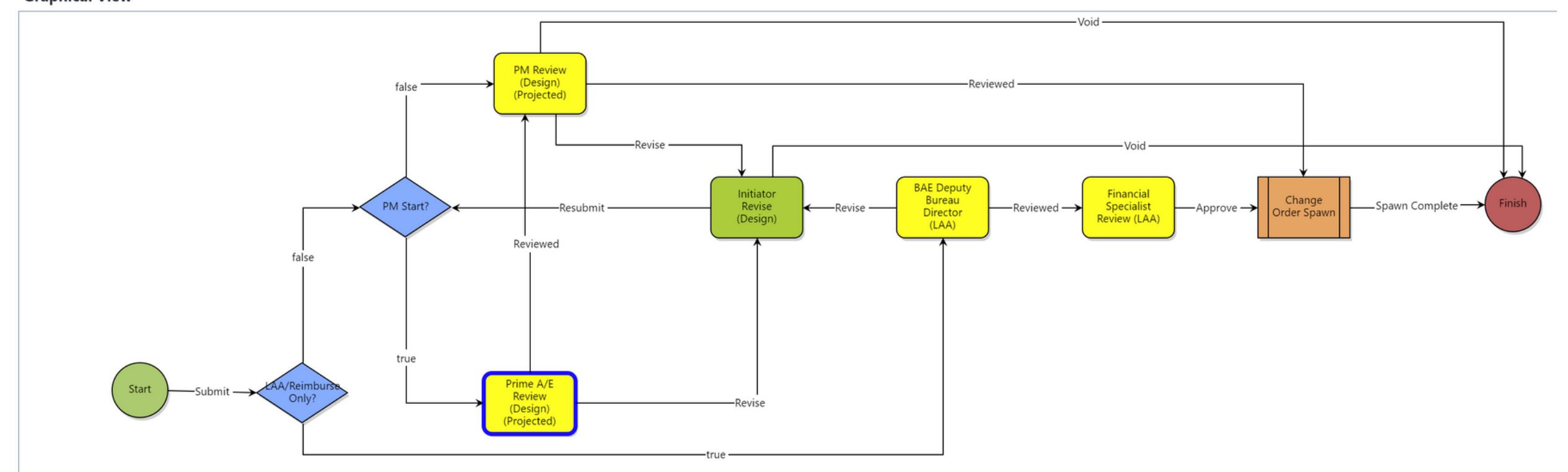
Processes in Your Court - Current Workflow

Design Change Request (DCR)

For a DCR, the entire workflow can be found below:

DCR - 29

Graphical View



Key

Each of the rectangles represent a different step in the flow, essentially, a different actor. You can tell what step it is in currently by the **darker blue ring** around it.



The blue diamonds represent conditional steps. Conditional steps are defined statements that can take a path of true or false. If a certain criteria is met then route the process one way, otherwise if not, route it another direction.



Using this feature, you are able to automate the start of another process that is dependent on the one you're creating.



Approving a Process

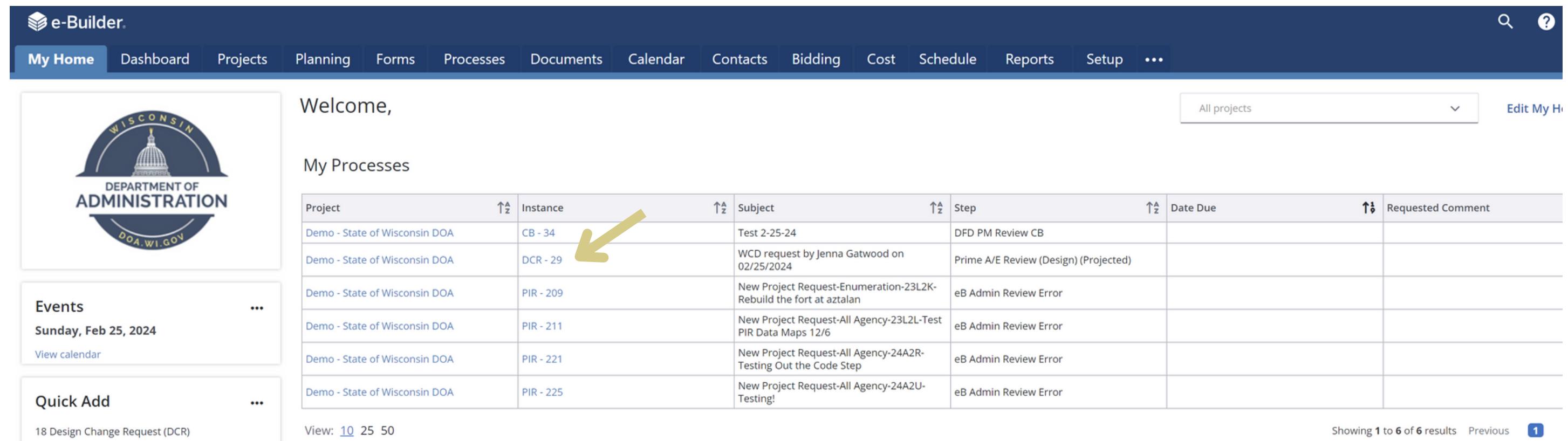
Design Change Request (DCR)

Approving a Process

Design Change Request (DCR)

From the My Home tab, find the appropriate instance in the My Processes section. Having a process in this section indicates that the item is in your court to review and approve before it can move forward in the workflow.

You can open the process by clicking on the process item's numbers. When clicked, the instance will open.



The screenshot shows the e-Builder My Home dashboard. The top navigation bar includes links for My Home, Dashboard, Projects, Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, Setup, and three dots. The main content area features a Wisconsin Department of Administration logo, a welcome message, and a search bar with a dropdown for 'All projects'. Below these are sections for 'Events' (Sunday, Feb 25, 2024) and 'Quick Add'. The 'My Processes' section is the focal point, displaying a table with columns for Project, Instance, Subject, Step, Date Due, and Requested Comment. The 'Instance' column is highlighted with a yellow arrow pointing to the 'DCR - 29' entry. The table data is as follows:

Project	Instance	Subject	Step	Date Due	Requested Comment
Demo - State of Wisconsin DOA	CB - 34	Test 2-25-24	DFD PM Review CB		
Demo - State of Wisconsin DOA	DCR - 29	WCD request by Jenna Gatwood on 02/25/2024	Prime A/E Review (Design) (Projected)		
Demo - State of Wisconsin DOA	PIR - 209	New Project Request-Enumeration-23L2K-Rebuild the fort at aztalan	eB Admin Review Error		
Demo - State of Wisconsin DOA	PIR - 211	New Project Request-All Agency-23L2L-Test PIR Data Maps 12/6	eB Admin Review Error		
Demo - State of Wisconsin DOA	PIR - 221	New Project Request-All Agency-24A2R-Testing Out the Code Step	eB Admin Review Error		
Demo - State of Wisconsin DOA	PIR - 225	New Project Request-All Agency-24A2U-Testing!	eB Admin Review Error		

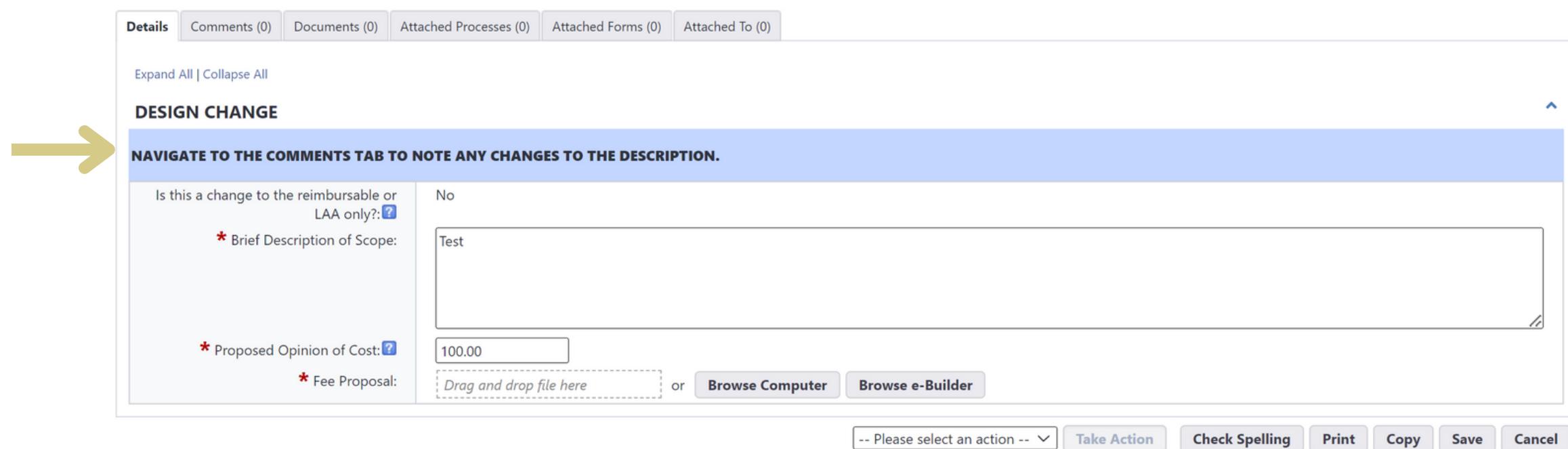
At the bottom, there are 'View' options (10, 25, 50) and a note indicating 'Showing 1 to 6 of 6 results'. The page number '1' is also present.

Approving a Process

Design Change Request (DCR)

Note: Depending on your role and the current step in the workflow, the action/approval steps may be different than what is shown. For a detailed view of workflow actions based on role, see page 1.

When the instance opens, scroll down until you see the empty fields. Fields with an asterisk (*) are required and must be completed before submitting. Review the information and navigate to the Comments tab to note any changes to the description.



Approving a Process

Design Change Request (DCR)

Once the information has been reviewed for the entire page, click the dropdown menu to select the appropriate action.

Once selected, click the Take Action button.

DESIGN CHANGE

NAVIGATE TO THE COMMENTS TAB TO NOTE ANY CHANGES TO THE DESCRIPTION.

Is this a change to the reimbursable or LAA only?: No

* Brief Description of Scope:
Test

* Proposed Opinion of Cost: 100.00

* Fee Proposal:
Drag and drop file here or

-- Please select an action --

DESIGN CHANGE

NAVIGATE TO THE COMMENTS TAB TO NOTE ANY CHANGES TO THE DESCRIPTION.

Is this a change to the reimbursable or LAA only?: No

* Brief Description of Scope:
Test

* Proposed Opinion of Cost: 100.00

* Fee Proposal:
Drag and drop file here or



Contact

For additional assistance, please contact a member of the DFD team.