HOW TO...
See screenshots at the end of this document for additional information.

A. CREATE A NEW INSTRUCTION
1. Navigate to PM Tools > Contract Management > Instructions
2. Click the ‘New’ button in the register view toolbar.
3. Populate required fields.
   a. Title
4. Optional: Populate additional fields as needed.
5. Optional: Click on the ‘Document Reference’ page to link other ePM documents as needed.
6. Optional: Click on the ‘Line Items’ page to add price breakdown detail as needed.
7. Click ‘Save’

B. ISSUE AN INSTRUCTION
1. Navigate to PM Tools > Contract Management > Instructions
2. In the register view, click on the row of the Instruction to be issued. Use one of the following methods to help find the Instruction document.
   a. Change to the appropriate view. See QRG #03 for more information about register views.
   b. Use the filter field to search for key words.
   c. Page forward or backward as needed.
3. With the Instruction document open, click ‘Workflow’ in the toolbar then click ‘Submit’.
4. Complete to following fields in the workflow dialog box as needed.
   a. To: Click on the magnifying glass icon to add ePM users on the project. Names in this field will be given an action item to review the Instruction document.
   b. Cc: Click on the magnifying glass icon to add ePM users on the project. Names in this field will be notified about the instruction as an FYI.
   c. Custom Message
   d. Priority
   e. Due Date
5. Click ‘Execute’
6. From the workflow confirmation pop-up, click either ‘Return to Document’ or ‘Return to Register’ as appropriate.

WHAT IS…
The ePM Instruction document can be used on a project for several different purposes. Some examples include, a Construction Directive that would provide direction to contractors with no additional cost to the project. An RFP or RFQ requesting a proposal or quote from a contractor for a change on the project.
An Architectural Supplemental Instruction providing clarity to the existing design documents. Or it can be used to authorize use of existing allowances.

WHO USES…

- Project Manager
- Construction Manager
- General Contractor
- Architect/Engineer

SCREENSHOTS