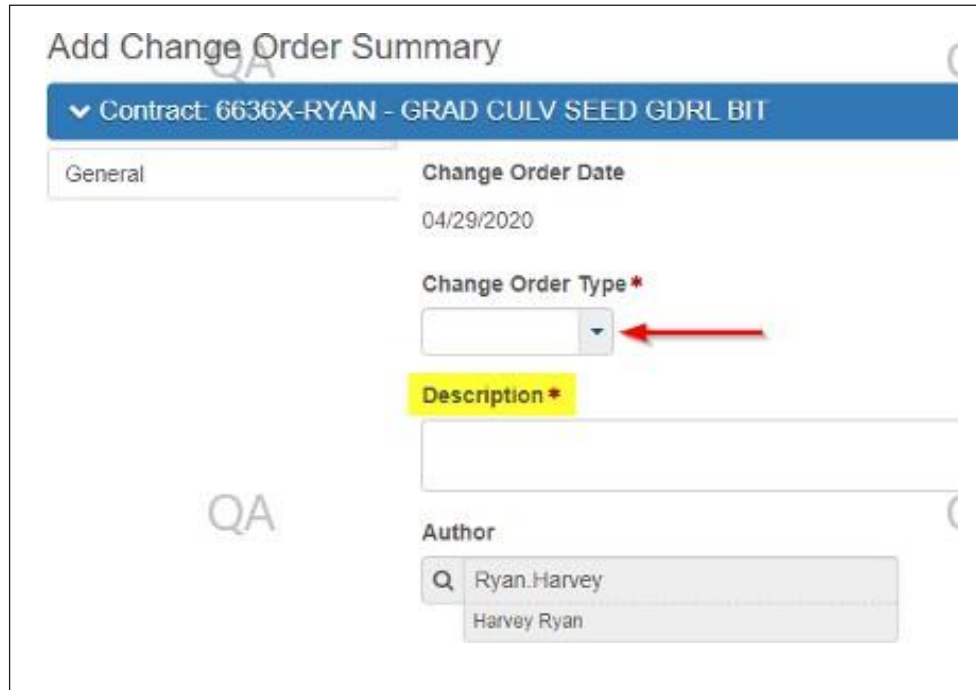


1. Navigate to the Contract Progress Summary screen for the Contract desired for the Stockpile.
2. Click on the “Change Orders” component on the left side of the page.
3. This will display all existing Change Orders.
  - a. To modify an existing Change Order, click the blue ‘CO Num’ hyperlink. Proceed to step 6 for additional instructions.
  - b. To create a new Change Order, click on the “Add” button.
4. The ‘Date’ and ‘Author’ fields are pre-populated with the current date and creator, respectively.
  - a. Select the appropriate Change Order Type from the drop-down list.
  - b. Enter a brief Description of the Change Order.



5. Click the ‘Save’ button in the blue Component banner near the top-right of the page.
6. The system navigates to the ‘Contract Change Order Summary’ page. The top section displays general information regarding the Change Order. The lower section displays Change Order Explanations.
  - a. To create, or add additional, explanations, enter a unique number in the ‘Order’ field. This determines how the explanations are displayed on reports.
  - b. Select an applicable reference/generic explanation from ‘Reference Explanation Name’ autocomplete field.
  - c. If appropriate, enter supplemental explanation information in the ‘Supp Explanation’ field.
  - d. Click ‘Save’ in the blue Component banner near the top-right of the page.

Order #	Reference Explanation Name	Explanation Description	Supp Explanation
1	01NDOT We hereby request approval of changes in the plans, specifications, or work not included in the plans or contract, described as follows:	We hereby request approval of ch...	
2	02NDOT To provide for the item(s) of work and to establish a basis of payment.	To provide for the item(s) of work :	Additional Change Order specific information
3	Begin typing to search or press Enter		More information as needed
	Begin typing to search or press Enter		up to 2000 characters

7. To modify an existing Item's quantity, select the 'Increase/Decrease Items' component tab along the left side of the page. This page will display existing modified Items.
  - a. To add a new Item for modification, click on the "Select Items" button. A modal window appears.
    - i. Use the autocomplete 'Search' field at the top of the modal window by entering information about the desired Item. The Pick List below will begin to filter Items matching the information entered.
    - ii. The "Projects" and "Categories" drop-down lists can be used to filter the Pick List by the indicated selection.
    - iii. Select the Items that need modified. Multiple Items may be selecting by clicking on each desired row.
      1. The blue "X selected" text in the upper right of the modal will display only the Items selected.
      2. The text changes to "Remove selected filter" to return the Pick List to a state matching any other filters enforce.
    - iv. Once the necessary Items are selected, click the "Add to Change Order" button in the lower right of the modal window.
  - b. Expand the row of the Items by clicking on the expand carrot at the left of the appropriate row.
    - i. Enter the quantity to either increase or decrease the current quantity in the 'Quantity' field.
    - ii. If specific Item Explanations are required, enter that information at the bottom of the appropriate Item under the "Change Order Increase/Decrease Items Explanations" section.



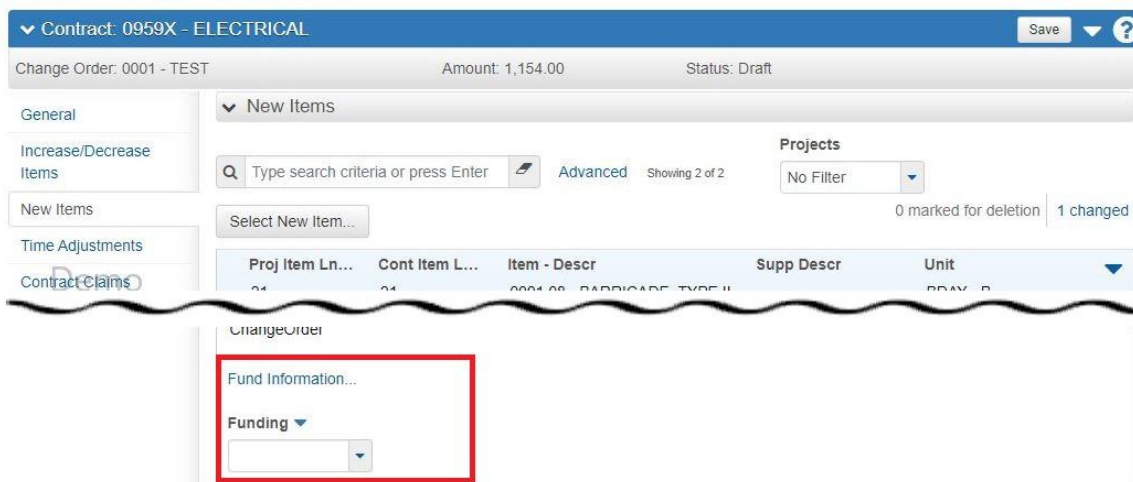
# Change Orders QRG

8. The 'New Items' component tab is broken into 3 sections.
  - a. The first section adds new Items that do not currently exist to the Contract.
    - i. Click on the "Select New Item..." button. A modal window appears.
      1. Use the autocomplete 'Reference Item' box to filter the Pick List of reference Items to the desired Item.
      2. Select the appropriate Category from the Pick List in the lower portion of the modal window.
      3. Click on the "Add to Change Order" button in the lower right of the modal window when complete.
    - ii. The system will return to the main page with the new Item expanded.
      1. Ensure the 'Project Item Line Number' and 'Contract Item Line Number' populate correctly.
      2. Enter the quantity and the unit price in the appropriate fields.
      3. If Item Explanations are necessary, enter the necessary information in the bottom of the expanded Item under the "Change Order New Item Explanations" section.
    - iii. Click on the 'Save' button in the blue component banner near the top right of the page.
  - b. The second section is used to approve previously added "Unattached Items".
    - i. Click on the "Select Unattached Item..." button. A modal window appears.
      1. Use the autocomplete 'Search' box to filter the Pick List. The list will only return previously added Unattached Items.
      2. Select the appropriate Unattached Item from the Pick List.
      3. Click on the "Add to Change Order" button in the lower right of the modal window when complete.
    - ii. The system will return to the main page with the Unattached Item expanded.
      1. Enter the quantity and the unit price in the appropriate fields.
      2. If Item Explanations are necessary, enter the necessary information in the bottom of the expanded Item under the "Change Order New Item Explanations" section.
    - iii. Click on the 'Save' button in the blue component banner near the top right of the page.
  - c. The last section allows adding quantity of an existing Item to a different Category. It does not modify the current Item.
    - i. Click on the "Select Contract Item" button. A modal window appears.
      1. Use the autocomplete 'Contract Item' box to filter the Contract Items to the desired Item.
      2. Select the appropriate Category from the Pick List in the lower portion of the modal window.
      3. Click on the "Add to Change Order" button in the lower right of the modal window when complete.
    - ii. The system will return to the main page with the new Item expanded.
      1. Ensure the 'Project Item Line Number' and 'Contract Item Line Number' populate correctly.
      2. Enter the quantity and the unit price in the appropriate fields.
      3. If Item Explanations are necessary, enter the necessary information in the bottom of the expanded Item under the "Change Order New Item Explanations" section.
    - iii. Click on the 'Save' button in the blue component banner near the top right of the page.

## 9. Change New Item Funding

- a. Items added via the “New Items” tab need to have funding assigned. If funding is not assigned the next pay estimate generated will likely encounter an exception that will force the funding assignment at that time.
- b. To assign funding the change order writer should determine what funding should be assigned to the item. That item should be placed into a work category with other items funded the same way.
- c. To review Funding Information from within the change order, the user can click on the “Funding Information...” link.

### Contract Change Order Summary



Contract: 0959X - ELECTRICAL

Change Order: 0001 - TEST      Amount: 1,154.00      Status: Draft

General      New Items

Increase/Decrease Items      Projects

New Items      Select New Item...      0 marked for deletion | 1 changed

Proj Item Ln...	Cont Item L...	Item - Descr	Supp Descr	Unit
04	04	0004 00 - BARRICADE TYPE II		PRAY P

ChangeOrder

Fund Information...

Funding ▾

- i. The user will then be presented with a modal window showing the given contract’s fund package information.

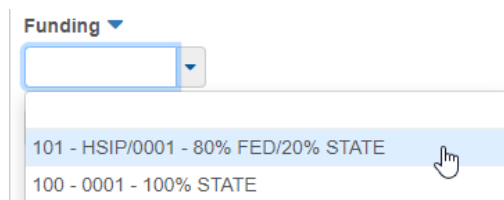


Type search criteria or press Enter      Advanced      Showing 3 of 3

0 changed

Fund	Fun...
> 0001	101
> 0001	100
> HSIP	101

- d. Once funding is reviewed and item has been added to the appropriate work category, the user can use the drop down “Funding” to select the fund package assignment to apply to the item being added via the Change Order.

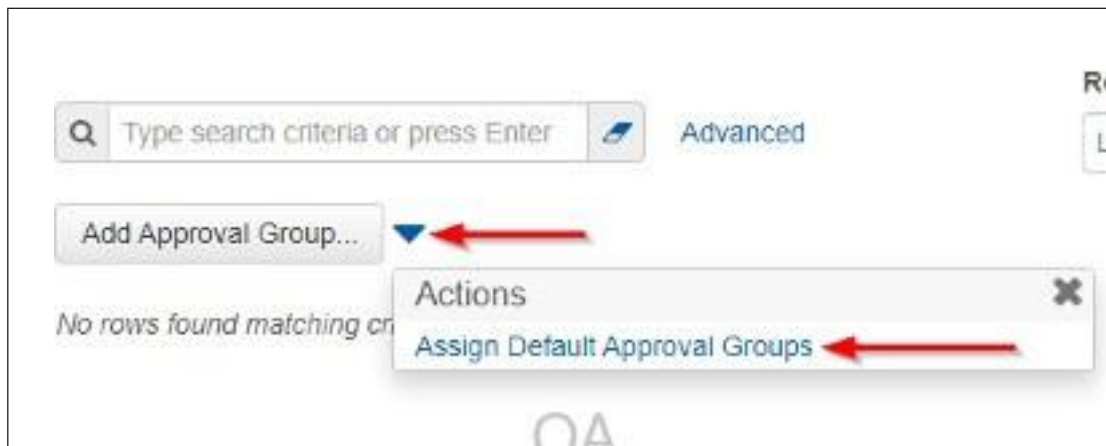


Funding ▾

101 - HSIP/0001 - 80% FED/20% STATE

100 - 0001 - 100% STATE

10. To make a time adjustment to an existing Contract Time, including Milestones, select the 'Time Adjustment' component tab along the left side. This page will display any previously added time adjustments.
  - a. To create a new time adjustment, click on the "Select Contract Time..." button. A modal window appears. Select the appropriate time(s) from the Pick List.
  - b. Click on the "Add Time Adjustments to Change Order" button in the lower right of the modal window.
  - c. The system returns to the main page with the time adjustment expanded.
    - i. Enter the adjustment number in the 'Adjustment Time Units' field.
    - ii. If specific explanations are necessary for the time adjustment, enter these under the "Time Adjustment Explanations" section at the bottom of the expanded time adjustment.
  - d. Click on the 'Save' button in the blue component banner near the top right of the page.
  
11. To assign the Approval Groups to the Change Order, navigate to the 'Approval Tracking' component tab along the left side of the page.
  - a. To assign the default approval levels, click the blue list action button and select 'Assign Default Approval Groups'.



- b. If additional approval levels are required, click on the 'Add Approval Group...' button. A modal window will appear.
  - i. Enter information into the 'Override Comments' field indicating the need for the additional approval groups.
  - ii. Select the required approval group(s) from the Pick List in the lower portion of the modal window.
  - iii. Click on the 'Save' button in the lower right of the modal window.
- c. The system will return to the main page, inserting the selected approval group(s) in the correct order.

12. When the Change Order is completed, click on the component action button in the right side of the blue component banner near the top of the page.
  - a. Select 'Submit for Approval' from the Tasks section. This will initiate the approval process.

