

MoDOT Trns*port™ SiteManager™

Quick Reference Guide

Change Orders

So, you are ready to create a SiteManager Change Order? Here's a quick reference on what steps to take:

Change Orders.Change Order Maintenance.Header

1. **Tentative Verbal Approval Dates:** May be used if it applies. Rush Change Orders may use these fields.
2. **Status:** Leave Status as Draft until all of the items and explanations are entered correctly. After all of the other steps have been correctly entered, return to the header and save it as pending. The change order will then be forwarded to the people you choose as approval levels.
3. **Description:** A short description of the Change Order.
4. **Reason Code:** Choose reason code from drop down list. Combination is a catch-all if multiple reasons apply.
5. **CO Type:** Choose type of change order. The type you pick is determined by the existing rules set forth for all Change Orders. Select one from the following choices: Resident Engineer Approval, District or Major.
6. **Functions:** Function must be chosen for the type of items in the Change Order. Every Function that is applicable to the change order must be checked or an error will appear when entering items. Do not use the Force Account check box. If the Force Account box is checked a force account number must be associated to the Change Order. MoDOT will not be using the Force Account section of SM at this time due to the fact that it does not match our specifications. For now if there is a Force Account on the Change Order just treat it as Extra Work. If it is a "no cost" Change Order, SM still needs to have a function picked. Pick the Overrun/Underrun if the Change Order is "no cost".
7. **Emergency Work:** Check if this applies.
8. **Force Account:** See #4
9. **Reference Doc:** Reference documents may be attached.

Change Orders.Change Order Maintenance.Change Order Items

Change Order Item Folder Tab

1. Don't forget the first step is to select New Change Order Item from the Services Menu.
2. You cannot zero out an item in a change order. Therefore, if you have an item which needs to be considered a "no cost" change, you must zero out the original item and add a new change order item, using the New Contract Item folder tab, to the contract. Use the same item code, description, quantity and price for the item you are changing. You will have to include reasons for both of these items in the Line Item Explanations.
3. **Change Order Item Description:** This is the description that shows up on the explanations window, if you do not enter something here the explanations window will just have the item and line numbers for each change order item with no description.
4. **This Change Order Quantity:** The quantity of the change, not the new plan quantity as it was in the past. Enter underruns as negative amounts.

New Contract Item Folder Tab

1. **Line Item Nbr:** Contingent item numbers for new line items will change since SiteManager will only accept a four digit number. Use numbers like 5101 to replace 501.01.
2. **Project Nbr:** The project number that the new item applies to.
3. **Item Code:** Perform a search and pick the item code. There is no longer a catch all for contingent item code (i.e.: Cont.), so an item code will have to be selected that is most relative

to the item. There are some catch all's, but the units must match or the calculations will be wrong. If you cannot find an item code that is relatively close by searching the Item Code field, one can be added by the SiteManager Administrator. **Hint: Item codes follow the standard specifications. For example, all item codes for earthwork will begin with 200. Find the Specification Number closest to the Item Code available from the spec book. Search the Items window by Unit to find all of the Units available for that item. Choose the closest Item Code that definitely fits the Unit and is closest to the description as possible. If there is not a match, there is usually a Misc. description that will match the Unit and a close range to the Spec Number for the Item Code. If you cannot find a match, enter a Support Request in the SiteManager P&P Database, Support Request view.**

4. **Major Item, Specialty:** Check if they apply.
5. **Unit Price:** Unit price for the item.
6. **Related Item:** This list is not populated so this field will not be used at this time.
7. **Critical:** Check if this is a critical item.
8. **Pay Plan Qty:** If this box is checked it will not be possible to overrun this item above this Change Order amount.
9. **Supplemental Descriptions:** Short description for the item.
10. **Category Number:** For funding purposes, select a Category Number.

Change Orders.Change Order Maintenance.Change Order Explanations

1. Change Order explanations should be assigned to specific line items. (Hint: from the drop down list, select "Explanations Applied to Specific Items"). An explanation to a specific line item must be associated with an item before it can be saved with a sequence number.
2. The explanation must begin with the following: Sequence Number - Overrun or Underrun: Reason. For example: Seq. No. 1 - Overrun: Begin typing the reason....
3. If you have a new item on your change order, place the "Settlement of Costs" statement at the beginning of the reason, immediately following the item description. For example: Seq. No. 1 - Overrun: Settlement of Costs based on the agreed price of \$10.00 per Linear Foot. Begin typing the reason....

Saving Change Order

1. To save the change order and get it on its way in the approval cycle, return to the Header window and change status from draft to pending, then save. Then designate the people you want as the approval level. The first two approval levels are Contractor and Change Order Level Approval Level 1. This was done because the actual personnel that have the responsibility for the respective levels is different for different offices.

Deleting a Change Order

1. To delete a Change Order the explanations and items must be deleted before the header information can be deleted. A Change Order which has been approved cannot be deleted.

Saving a PSR

1. SiteManager updates the header information of reports each time an estimate is ran. SiteManager also does not automatically save a report when you close it. So if you generate a report on a certain date and do not save it, the next time that you generate that report the header information will be for the date that it is generated. Conclusion: If you want a Change Order, Estimate Summary to Contractor or any other SiteManager report to have the header information reflect the contract status at the time the report was first made correctly you **must save the report as a PSR** (previously saved report). If this is done the header will correctly reflect the contract information at the time of the report.

Policy: Save PSR's on the V: drive in the following path for your district. V:\savedreports\districtx (x equals your district number). **You will need to create a subdirectory for your contract prior to saving the report. Example: V:\savedreports\districtx\990101-01.**