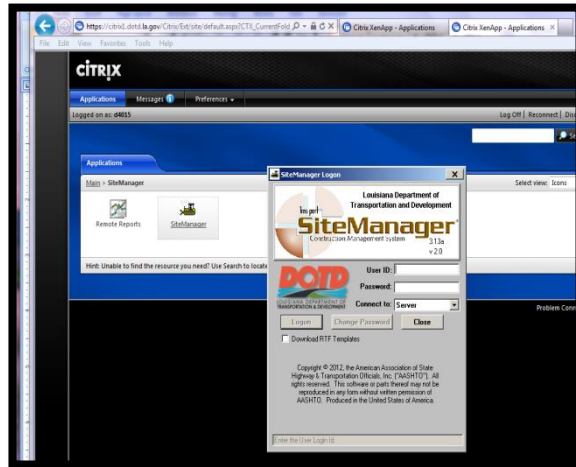


SITEMANAGER - CHANGE ORDER

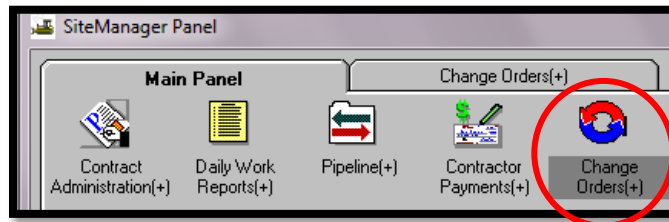
QUICK REFERENCE

Getting Started

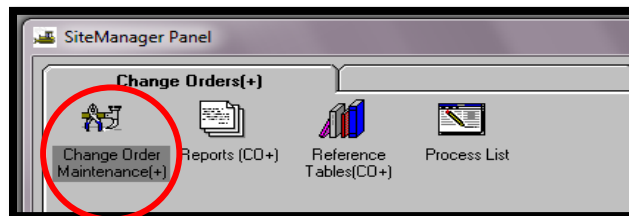
Login to SiteManager either through the Citrix program (outside of DOTD) or from an internal DOTD computer, as the Office Manager. Remember, the User ID's for Citrix and SiteManager are the same, but the passwords are different.



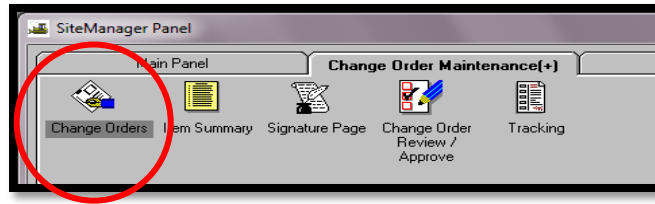
Click on the **Change Orders** folder.



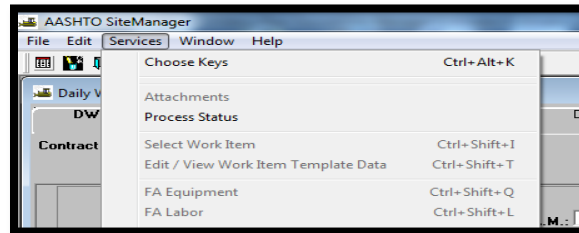
Click on the **Change Order Maintenance (+)** function.



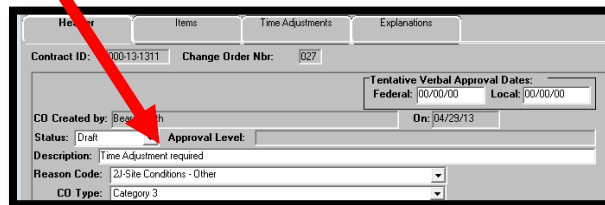
Click on the **Change Orders**



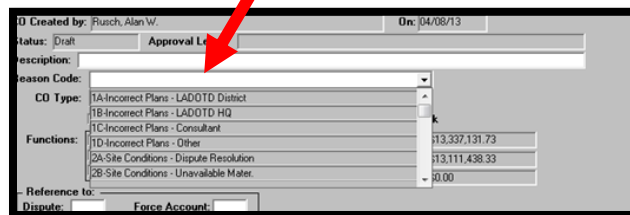
Select the **Contract/Project** by clicking the “Choose Keys” function from the “Services” menu



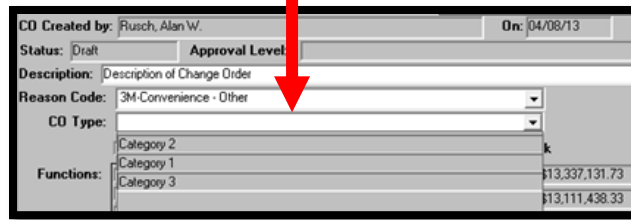
Now Enter the **Description** of the Change Order



Using drop down list select the **Reason Code**

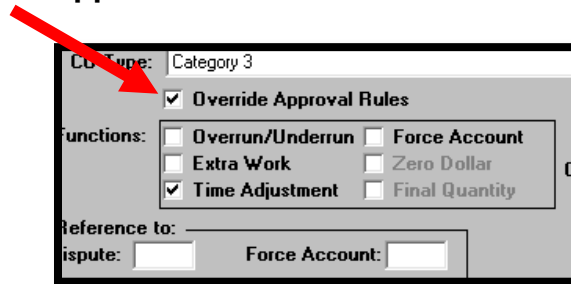


Use the Drop Down List to select the **Category**



CD Created by: Rusch, Alan W. On: 04/08/13
Status: Draft Approval Level
Description: Description of Change Order
Reason Code: 3M-Convenience - Other
CO Type: Category 2
Functions: Category 1 \$13,337,131.73
Category 3 \$13,111,438.33

Always Check **Override Approval Rules**



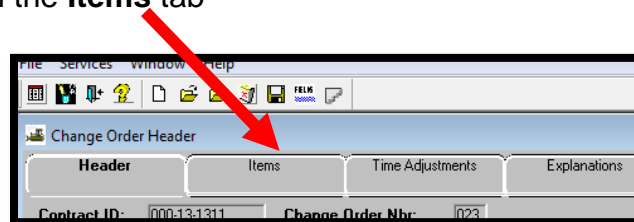
CO Type: Category 3
 Override Approval Rules
Functions: Overrun/Underrun Force Account
 Extra Work Zero Dollar
 Time Adjustment Final Quantity
Reference to:
Dispute: Force Account:

Depending on your change order select (1 or more)

- Overrun/Underrun (for existing items)
- Extra Work (for new items)
- Time Adjustment (to add days)
- Zero Dollar (to change scope of work)
- **(Never select Force Account or Final Quantity)**

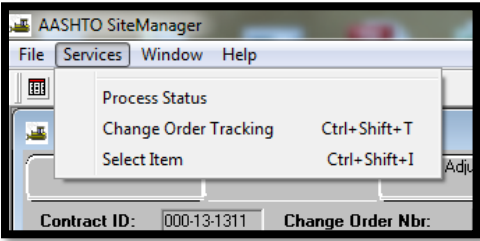
Click on the **Save** Icon .

Next you will click on the **Items** tab



File Services Window Help
Change Order Header
Header Items Time Adjustments Explanations
Contract ID: 000-13-1311 Change Order Nbr: 023

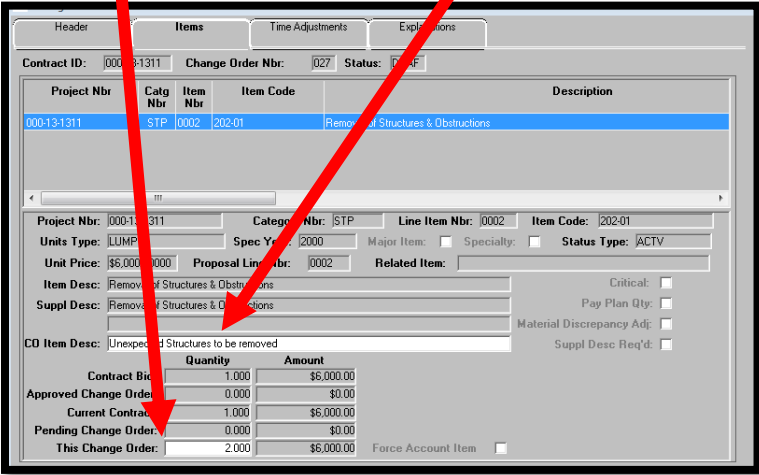
To change the contract quantity of an existing item, click on “Services”, then “Select Item”



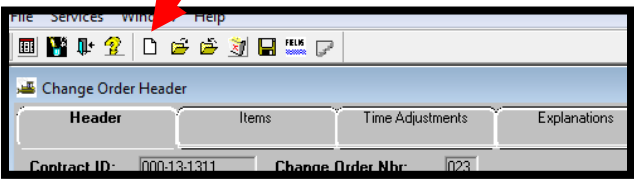
Select the item from the list

Project Nbr	Catg Nbr	Item Nbr	Item Code	Description
000-13-1311	STP	0001	201-01	Cleaning & Grubbing
000-13-1311	STP	0002	202-01	Removal of Structures & Obstructions
000-13-1311	STP	0005	202-02-D	Removal of Concrete Walks & Drives
000-13-1311	STP	0006	202-02-G	Removal of Surfacing & Stabilized Base

Enter the **Change Order Quantity** and **CO Item Description**. Click **Save**



To add a new item to the contract, click on **New Icon** 



Select the **Project Nbr** and funding **Category Nbr.** Enter the **Line Item Nbr,** **Item Code,** and **Unit Price.**

The screenshot shows the 'Change Order Items' form. Red arrows point to the following fields: Project Nbr (000-13-1311), Category Nbr (023), Line Item Nbr, Item Code, and Unit Price (\$ 0.0000). The form also includes a table for 'CO Item Desc' with columns for Quantity and Amount.

CO Item Desc	Quantity	Amount
Contract Bid:	0.000	\$0.00
Approved Change Order:	0.000	\$0.00
Current Contract:	0.000	\$0.00
Pending Change Order:	0.000	\$0.00
This Change Order:	0.000	\$0.00

Next, add a **Supplement Description,** and a **Quantity** for **This Change Order**

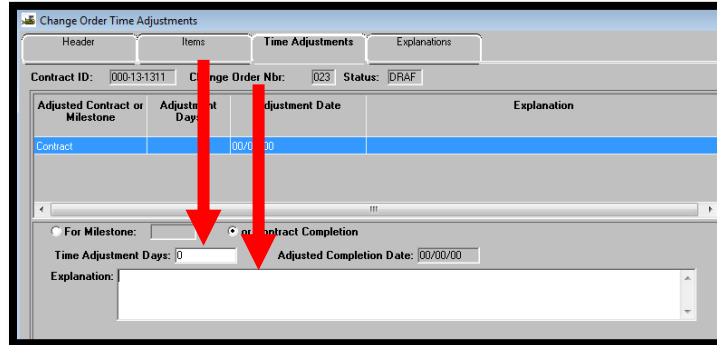
Click Save .

The screenshot shows the 'Change Order Items' form after data entry. Red arrows point to the Item Code (202-02-13) and the 'This Change Order' row in the 'CO Item Desc' table. The 'This Change Order' row now has a Quantity of 1.000 and an Amount of \$5,000.00.

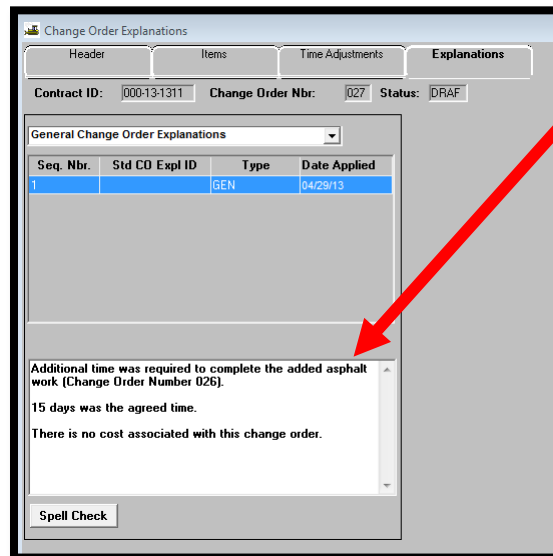
CO Item Desc	Quantity	Amount
Contract Bid:	0.000	\$0.00
Approved Change Order:	0.000	\$0.00
Current Contract:	0.000	\$0.00
Pending Change Order:	0.000	\$0.00
This Change Order:	1.000	\$5,000.00

For Change Orders that are generated for **Time Adjustments**, click on **Time Adjustment** tab,

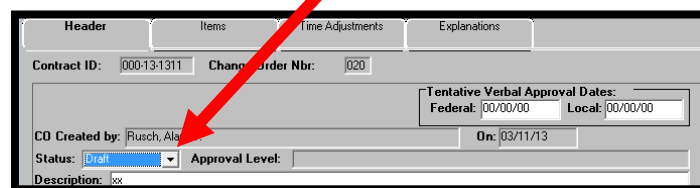
Enter the number of Days and an explanation for the time adjustment. Click Save .



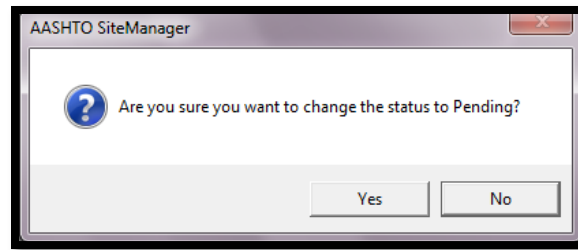
For all Change Orders, click on the **Explanations** tab and add a thorough, detailed explanation of the reason the change order is necessary.



After review, go back to the **Header** tab and change the status from **Draft** to **Pending**

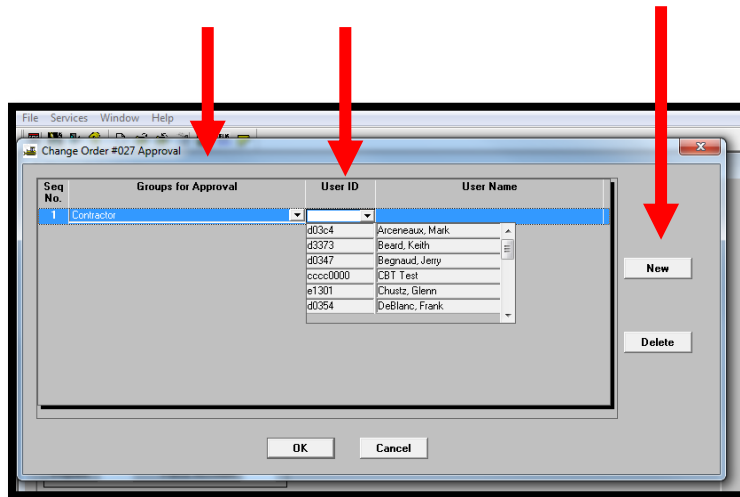


You will get this message, click “Yes”.



Now enter the Change Order Approvers (Each Category has a different approval requirement).

Click “New”, select the **Groups for Approval** from the drop-down list, then the **User ID** of the person required to approve the Change Order.



Repeat the process until all of the required approvers are listed. “Click OK”

Any questions or problems please contact either:

Keith Beard at 225-767-9186 / Keith.beard@la.gov

Alan Rusch at 225-379-1592 / Alan.rusch@la.gov