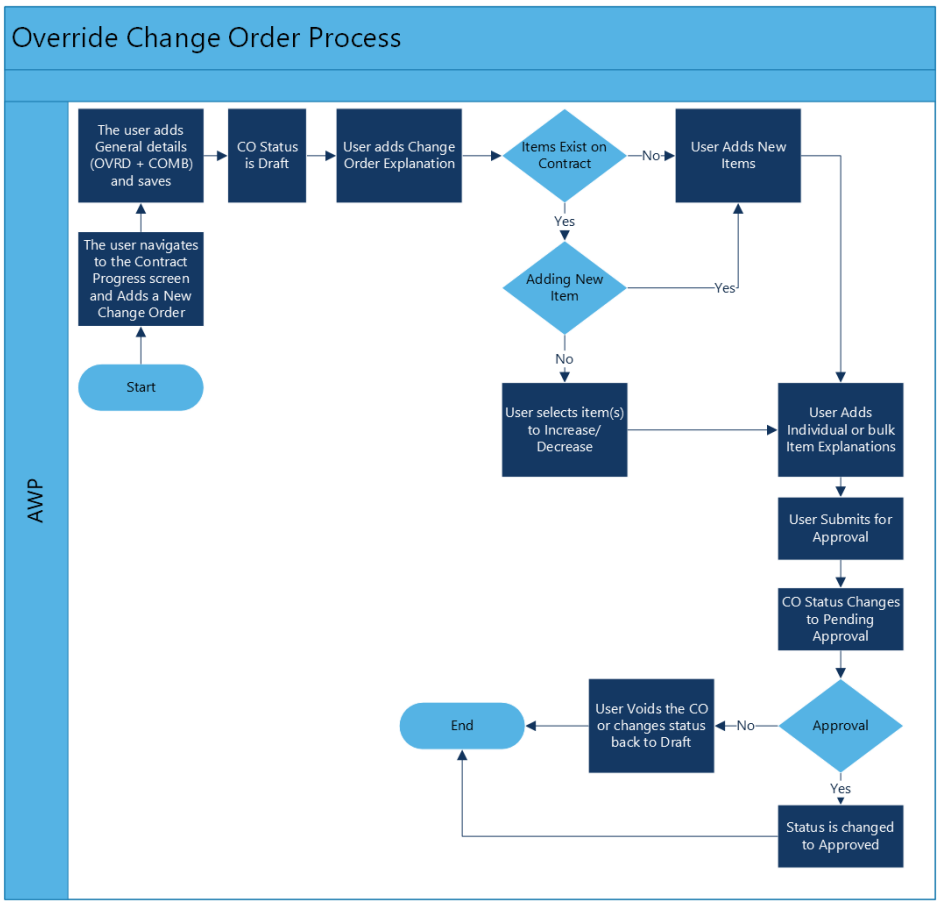
Managing Change Orders

Role(s):

ADMIN	KYTC_Inspector
KYTC_Construction Admin	KYTC_Construction Read-Only User
KYTC_Central Office Construction	KYTC_Auditor
KYTC_Section Office Supervisor	KYTC_Final Estimate Section
KYTC_Section Office Manager	KYTC_Contract Estimate Section Mars
KYTC_Final Approval Change Order	KYTC_Chief District Engineer
KYTC_District Construction Office Manager	

Background:

- Below is a high-level overview of the Override Change Order Process:





- **Note:** Time Adjustments, Contract Claims, Force Accounts, and Review Tracking will not be used for the BSB Project.

Prepared by Info Tech Operating, LLC, DBA Infotech. The AASHTOWare Project logo, the AASHTOWare Project Construction & Materials logo, and the Mobile Tester logo are registered trademarks of AASHTO. AASHTOWare Project, AASHTOWare Project Construction & Materials, and AASHTOWare Project Mobile Tester are proprietary software products of AASHTO. Mobile Inspector is a proprietary software product of Info Tech Operating, LLC.
© Copyright 2024 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved.

Managing Change Orders

View Change Orders on a Contract

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary

1. From the Contract Progress Summary, click the **Change Orders** tab.
2. In the **quick find** search box, you can search or press Enter to view existing Change Orders on the Contract, or you can click the **Show first 10** link.
3. Click the **CO Num** link for the Change Order you wish to view.
4. From the Contract Change Order Summary, you can click through the tabs to view more information about that specific Change Order.

Add an Override Change Order

- Only the following role(s) can exercise this section: SysWide (Admin), KYTC_Construction Admin (KYTC_Construction_SYSWIDE)

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab

1. From the Contract Progress Summary, on the **Change Orders** tab, click the **Add** button.
2. In the **Change Order Date** field, the date will be defaulted to the current date.
   - **Note:** This date can be modified but should typically be left as the current date.
3. In the **Description** field, enter the necessary text to describe the Change Order.
4. In the **Change Order Type** field, click the drop-down arrow and select the **OVRD – OVERRIDE** option.
5. The **Author** field will default to the user adding the Change Order.
6. In the **Reason** field, click the drop-down arrow and select the **COMB – Combination** option.
7. Click the **Save** button.
   - **Note:** If different options are selected for the **Change Order Type** or **Reason** fields, the Change Order will need to be modified or rejected.

Prepared by Info Tech Operating, LLC, DBA Infotech. The AASHTOWare Project logo, the AASHTOWare Project Construction & Materials logo, and the Mobile Tester logo are registered trademarks of AASHTO. AASHTOWare Project, AASHTOWare Project Construction & Materials, and AASHTOWare Project Mobile Tester are proprietary software products of AASHTO. Mobile Inspector is a proprietary software product of Info Tech Operating, LLC.
© Copyright 2024 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved.

8. From the Contract Change Order Summary, on the **General** tab, you will see additional fields and tabs displayed after saving the Change Order.
   - **Note:** For the BSB Project, the **Ready for Review** check box should remain unchecked.
9. Scroll down to the **Change Order Explanations** section.
10. If needed, you can add an explanation by entering the **Order** number, as well as a **Reference Explanation Name** or **Supp Explanation**.
    - **Note:** The number entered in the **Order** field must be unique.
    - **Note:** If you enter an **Order** number, you must add a Reference Explanation or Supplemental Explanation. If adding a **Reference Explanation Name**, you can search and select the Reference Explanation by clicking into the field and pressing Enter to see the available options.
11. Click the **Save** button.

Increase/Decrease Items on a Change Order

- Only the following role(s) can exercise this section: SysWide (Admin), KYTC_Construction Admin (KYTC_Construction_SYSWIDE), KYTC_Section Office Supervisor, KYTC_Section Office Manager

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab > CO Num link > Contract Change Order Summary

1. From the Contract Change Order Summary, click the **Increase/Decrease Items** tab.
2. Click the **Select Items** button.
3. In the **quick find** search box, search for an item or click the **Show first 10** link to view the available items.
   - **Note:** These are reference items that are already on the Contract. If the item is on another Change Order that has not yet been approved, an existing contract item may not be selectable.
4. Select one or more items from the list.
5. Click the **Add to Change Order** button.
6. In the **Quantity** field, enter the approved quantity for the contract project item.
   - **Note:** This can be a negative or positive number.

Prepared by Info Tech Operating, LLC, DBA Infotech. The AASHTOWare Project logo, the AASHTOWare Project Construction & Materials logo, and the Mobile Tester logo are registered trademarks of AASHTO. AASHTOWare Project, AASHTOWare Project Construction & Materials, and AASHTOWare Project Mobile Tester are proprietary software products of AASHTO. Mobile Inspector is a proprietary software product of Info Tech Operating, LLC.
© Copyright 2024 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved.

7. To add an explanation, you must enter an **Order** number, as well as a **Reference Explanation Name** or **Supp Explanation**.
   - **Note:** If you enter an **Order** number, you must add a Reference Explanation or Supplemental Explanation. If adding a **Reference Explanation Name**, you can search and select the Reference Explanation by clicking into the field and pressing Enter to see the available options.
   - **Note:** The **Synched** field is set to **No** unless it was added on **Change Order item Explanations** tab, in which case it would be set to **Yes**. If the synced explanation is modified on the **New Items** or **Increase/Decrease Items** tabs, then the **Synched** field will be set to **No**.
8. Click the **Save** button.

Add New Items on a Change Order

- Only the following role(s) can exercise this section: SysWide (Admin), KYTC_Construction Admin (KYTC_Construction_SYSWIDE), KYTC_Section Office Supervisor, KYTC_Section Office Manager

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab > CO Num link > Contract Change Order Summary

1. From the Contract Change Order Summary, click the **New Items** tab.
2. In the **New Items** section, click the **Select New Item** button.
3. In the **Reference Item** field, search and select the item.
4. Select one or more projects/categories to add.
   - **Note:** You can select the same reference item and project category as another item on the contract. This is because other information could differ from the item already on the contract.
5. Click the **Add to Change Order** button.
6. In the **Project Item Line Number** field, enter the unique value.
   - **Note:** This number will normally be kept at the default value but cannot be less than 8000. The number will increment up by 5 from the highest (8000) project item line number on the contract.
7. In the **Contract Item Line Number** field, enter the unique value.

Prepared by Info Tech Operating, LLC, DBA Infotech. The AASHTOWare Project logo, the AASHTOWare Project Construction & Materials logo, and the Mobile Tester logo are registered trademarks of AASHTO. AASHTOWare Project, AASHTOWare Project Construction & Materials, and AASHTOWare Project Mobile Tester are proprietary software products of AASHTO. Mobile Inspector is a proprietary software product of Info Tech Operating, LLC.
© Copyright 2024 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved.

- **Note:** This number will normally be kept at the default value but cannot be less than 8000. This number will increment up by 10 from the highest (8000) contract item line number on the contract.

8. In the **Quantity** field, enter the required number of units of the item.
   - **Note:** This can be a negative or positive number.
9. In the **Unit Price** field, enter the price for the item at the contract project level.
   - **Note:** For the BSB Project, enter a unit price of 1 for all items.
10. In the **Supplemental Description** field, you can enter detail for the specific project.
    - **Note:** This field is optional but may be required for some reference items.
11. To add an explanation in the **Change Order New Item Explanations** section, you must enter an **Order** number, as well as a **Reference Explanation Name** or **Supp Explanation**.
    - **Note:** If you enter an **Order** number, you must add a Reference Explanation or Supplemental Explanation. If adding a **Reference Explanation Name**, you can search and select the Reference Explanation by clicking into the field and pressing Enter to see the available options.
12. Click the **Save** button.

Add New Contract Items on a Change Order

- Only the following role(s) can exercise this section: SysWide (Admin), KYTC_Construction Admin (KYTC_Construction_SYSWIDE), KYTC_Section Office Supervisor, KYTC_Section Office Manager

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab > CO Num link > Contract Change Order Summary

1. From the Contract Change Order Summary, click the **New Items** tab.
2. In the **Contract Items** section, click the **Select Contract Item** button.
3. In the **Contract Item** field, search and select the item.
   - **Note:** These items are all items on the Contract. Also, the available projects/categories to add will adjust depending on which contract item is selected.
4. Select one or more projects/categories to add.

Prepared by Info Tech Operating, LLC, DBA Infotech. The AASHTOWare Project logo, the AASHTOWare Project Construction & Materials logo, and the Mobile Tester logo are registered trademarks of AASHTO. AASHTOWare Project, AASHTOWare Project Construction & Materials, and AASHTOWare Project Mobile Tester are proprietary software products of AASHTO. Mobile Inspector is a proprietary software product of Info Tech Operating, LLC.
© Copyright 2024 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved.

- **Note:** You can select the same reference item and project category as another item on the contract. This is because other information could differ from the item already on the contract.

5. Click the **Add to Change Order** button.
6. In the **Project Item Line Number** field, enter the unique value.
   - **Note:** This number will normally be kept at the default value but cannot be less than 8000. The number will increment up by 5 from the highest (8000) project item line number on the contract.
7. The **Contract Item Line Number** field is read-only, and it will display the same Contract Item Line Number as the one selected.
8. In the **Quantity** field, enter the required number of units of the item.
   - **Note:** This can be a negative or positive number.
9. In the **Unit Price** field, enter the price for the item at the contract project level.
   - **Note:** For the BSB Project, enter a unit price of 1 for all items.
10. The **Supplemental Description** field is read-only and will display the Supplemental Description on the contract item, if available.
11. To add an explanation in the **Change Order New Item Explanations** section, you must enter an **Order** number, as well as a **Reference Explanation Name** or **Supp Explanation**.
    - **Note:** If you enter an **Order** number, you must add a Reference Explanation or Supplemental Explanation. If adding a **Reference Explanation Name**, you can search and select the Reference Explanation by clicking into the field and pressing Enter to see the available options.
12. Click the **Save** button.

Add Change Order Item Explanations on a Change Order

- Only the following role(s) can exercise this section: SysWide (Admin), KYTC_Construction Admin (KYTC_Construction_SYSWIDE), KYTC_Section Office Supervisor, KYTC_Section Office Manager
- **Note:** You can use the **Change Order Item Explanations** tab to assign reference explanations or supplemental explanations to change order items in bulk. The change order items must already be added to the Change Order in order to be associated.

Prepared by Info Tech Operating, LLC, DBA Infotech. The AASHTOWare Project logo, the AASHTOWare Project Construction & Materials logo, and the Mobile Tester logo are registered trademarks of AASHTO. AASHTOWare Project, AASHTOWare Project Construction & Materials, and AASHTOWare Project Mobile Tester are proprietary software products of AASHTO. Mobile Inspector is a proprietary software product of Info Tech Operating, LLC.
© Copyright 2024 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved.

Managing Change Orders

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab > CO Num link > Contract Change Order Summary

1. From the Contract Change Order Summary, click the **Change Order Item Explanations** tab.
2. Click the **New** button.
3. To add an explanation, enter the **Order** number, as well as a **Reference Explanation Name** or **Supp Explanation**.
   - **Note:** The number entered in the **Order** field must be unique.
   - **Note:** If you enter an **Order** number, you must add a Reference Explanation or Supplemental Explanation. If adding a **Reference Explanation Name**, you can search and select the Reference Explanation by clicking into the field and pressing Enter to see the available options.
4. Click the **Save** button.
5. Click the row **Actions** menu for the Change Order Item Explanation.
6. Select the **Associate Change Order Items** action.
7. In the **quick find** search box, search for an item.
8. Select the item(s) to associate with this Change Order Item Explanation.
   - **Note:** All or a single contract item on the Change Order can be selected.
9. Click the **Add to Change Order Item Explanation** button.

Submit a Change Order for Approval

- Only the following role(s) can exercise this section: [Insert role(s) here]

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab > CO Num link > Contract Change Order Summary

1. From the Contract Change Order Summary, click the component **Actions** menu.
2. Select the **Submit for Approval** task.
   - **Note:** An email will be sent to notify the CO Author, Project Engineer/Manager, and Final Approver that the Change Order was submitted for approval.

Prepared by Info Tech Operating, LLC, DBA Infotech. The AASHTOWare Project logo, the AASHTOWare Project Construction & Materials logo, and the Mobile Tester logo are registered trademarks of AASHTO. AASHTOWare Project, AASHTOWare Project Construction & Materials, and AASHTOWare Project Mobile Tester are proprietary software products of AASHTO. Mobile Inspector is a proprietary software product of Info Tech Operating, LLC.
© Copyright 2024 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved.

- **Note:** You can click the **Approval Tracking** tab to view the approvals on the Change Order.

Approve a Change Order

- Only the following role(s) can exercise this section: ADMIN, KYTC_Final Approval Change Order
- **Note:** The Change Order must be in the **Pending Approval** Status before approving.

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab > CO Num link > Contract Change Order Summary

1. From the Contract Change Order Summary, click the component **Actions** menu.
2. Select the **Approve** task.
   - **Note:** An email will be sent to notify the CO Author, Project Engineer/Manager, and Final Approver that the Change Order Status is now Approved.

Void an Override Change Order

- Only the following role(s) can exercise this section: ADMIN, KYTC_Final Approval Change Order
- **Note:** The Change Order must be in the **Draft** or **Pending Approval** Status before voiding.

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab > CO Num link > Contract Change Order Summary

1. From the Contract Change Order Summary, click the component **Actions** menu.
2. Select the **Change to Void** task.
   - **Note:** An email will be sent to notify the CO Author, Project Engineer/Manager, and Final Approver that the Change Order Status is now Void.

Change a Change Order to Draft

- Only the following role(s) can exercise this section: ADMIN, KYTC_Construction Admin, KYTC_Central Office Construction, KYTC_Section Office Supervisor, KYTC_Section Office Manager, and KYTC_Final Approval Change Order

Prepared by Info Tech Operating, LLC, DBA Infotech. The AASHTOWare Project logo, the AASHTOWare Project Construction & Materials logo, and the Mobile Tester logo are registered trademarks of AASHTO. AASHTOWare Project, AASHTOWare Project Construction & Materials, and AASHTOWare Project Mobile Tester are proprietary software products of AASHTO. Mobile Inspector is a proprietary software product of Info Tech Operating, LLC.
© Copyright 2024 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved.

- **Note:** The Change Order must be in the **Pending Approval** or **Rejected** Status before returning it to **Draft**.

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab > CO Num link > Contract Change Order Summary

1. From the Contract Change Order Summary, click the component **Actions** menu.
2. Select the **Change to Draft** task.
   - **Note:** Once the Change Order is submitted for approval again, an email will be sent to notify the CO Author, Project Engineer/Manager, and Final Approver.

Delete a Change Order

- Only the following role(s) can exercise this section: ADMIN, KYTC_Final Approval Change Order, KYTC_Section Office Manager
- **Note:** The Change Order must be in the **Draft** Status and be the most recent Change Order before deleting.

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab > CO Num link > Contract Change Order Summary

1. Open the Change Order and delete any items that exist.
2. From the Contract Change Order Summary, click the component **Actions** menu.
3. Select the **Delete** action.
   - **Note:** The Change Order is now removed from the Contract.

Run Change Order Report_KYTC

- Only the following role(s) can exercise this section: ADMIN, KYTC_Construction Admin, KYTC_Central Office Construction, KYTC_Section Office Supervisor, KYTC_Section Office Manager, KYTC_Final Approval Change Order, KYTC_District Construction Office Manager, KYTC_Inspector, KYTC_Construction Read-Only User, KYTC_Auditor, KYTC_Final Estimate Section, KYTC_Contract Estimate Section Mars, or KYTC_Chief District Engineer

Prepared by Info Tech Operating, LLC, DBA Infotech. The AASHTOWare Project logo, the AASHTOWare Project Construction & Materials logo, and the Mobile Tester logo are registered trademarks of AASHTO. AASHTOWare Project, AASHTOWare Project Construction & Materials, and AASHTOWare Project Mobile Tester are proprietary software products of AASHTO. Mobile Inspector is a proprietary software product of Info Tech Operating, LLC.
© Copyright 2024 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved.

Managing Change Orders

Navigation: Construction > Contract Progress > Contract ID link > Contract Progress Summary > Change Orders tab > CO Num link > Contract Change Order Summary

1. From the Contract Change Order Summary, click the component **Actions** menu.
2. From the **Reports** section, select the **Change Order Report_KYTC** link.
   - **Note:** To select this link from the **Historical Reports** section, the Change Order must be in **Approved** Status.
3. Click the **Execute** button.

Prepared by Info Tech Operating, LLC, DBA Infotech. The AASHTOWare Project logo, the AASHTOWare Project Construction & Materials logo, and the Mobile Tester logo are registered trademarks of AASHTO. AASHTOWare Project, AASHTOWare Project Construction & Materials, and AASHTOWare Project Mobile Tester are proprietary software products of AASHTO. Mobile Inspector is a proprietary software product of Info Tech Operating, LLC.
© Copyright 2024 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved.