

Quick Reference Guide

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Reviewed for Version: SiteManager 3.1a-2

Forwarding A Change Order For Review

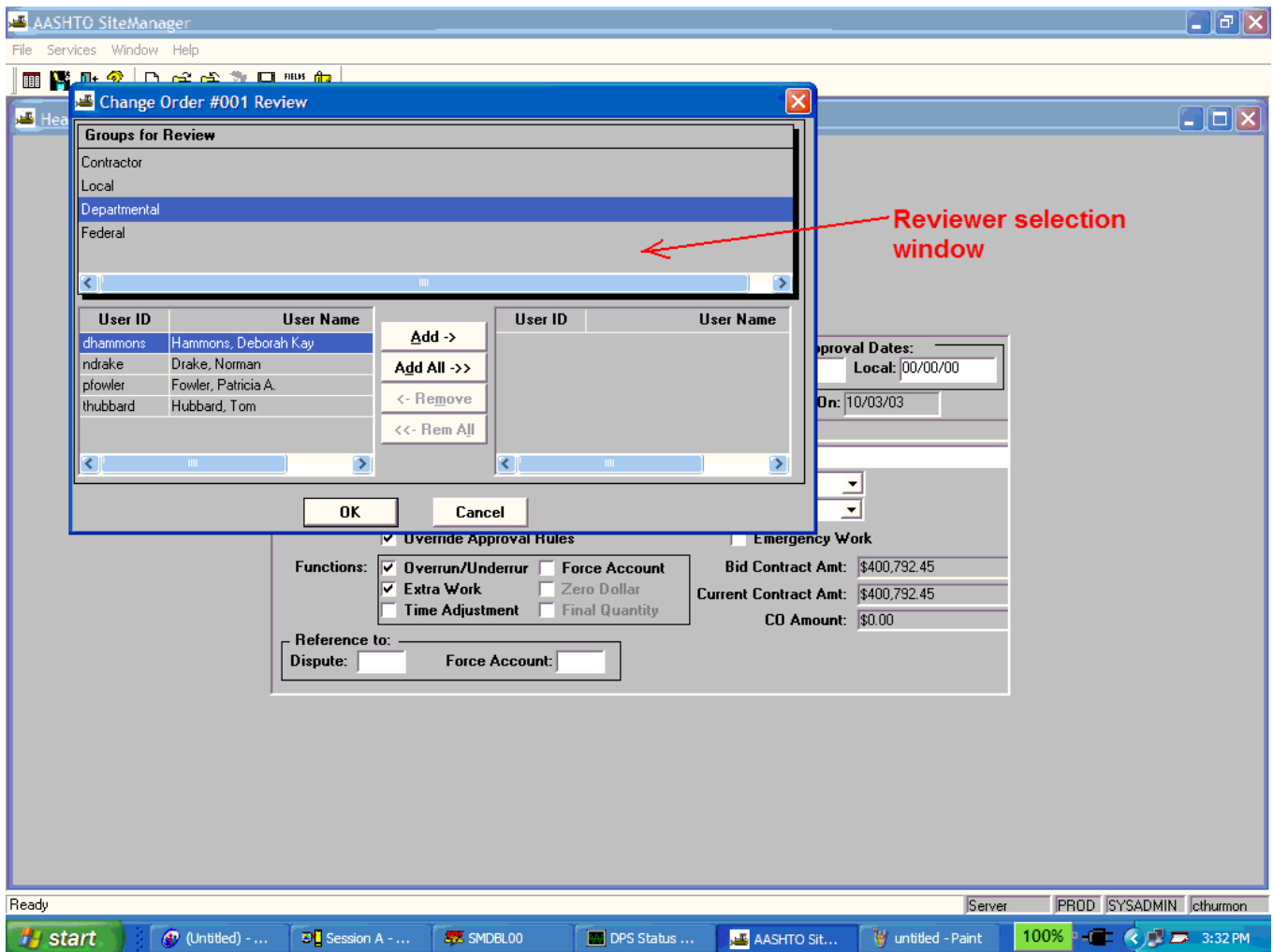
After a change order is created, a change order in "draft" status can be forwarded, via in-box notification, for parallel review. Parallel review is a concurrent review by more than one reviewer at a time. Users involved in reviewing a draft change order can record their decisions about proposed changes to the contract on-line, using the Review/Approve window. Reviewers receive an In-Box message from the change order author requesting a review action. The In-Box message specifies the contract and change order number.

To forward a Draft change order for review, perform the following steps:

1. Make sure the change order is in draft status. On the change order header window, click the Services menu and then click the Forward To choice. The Groups for Review Window appears.

The screenshot displays the AASHTO SiteManager application window. The 'Services' menu is open, showing options like 'Choose Keys', 'Generic Fields', 'Attachments', 'Process Status', 'Calculate Change Order', 'Forward To...', 'CO Items', 'CO Time Adjustments', and 'Change Order Tracking'. A red arrow points to the 'Forward To...' option. Another red arrow points to the 'Draft' status in the 'Status' dropdown menu. The main form shows details for a change order, including Contract ID (030108), CO Number (001), and Status (Draft). The 'Description' is 'Add Bridge Repair Items'. The 'Reason Code' is 'Site Requirement'. The 'CO Type' is 'SUPPLEMENTAL AGREEMENT'. The 'Functions' section includes checkboxes for 'Override Approval Rules', 'Emergency Work', 'Overrun/Underrun', 'Force Account', 'Extra Work', 'Zero Dollar', 'Time Adjustment', and 'Final Quantity'. The 'Reference to:' section includes 'Dispute' and 'Force Account' fields. The 'Tentative Verbal Approval Dates' section shows 'Federal' and 'Local' dates. The 'Bid Contract Amt' is \$400,792.45, and the 'Current Contract Amt' is \$400,792.45. The 'CO Amount' is \$0.00. The status bar at the bottom shows 'Forward Change Order for Review or Approval' and 'Server PROD SYSADMIN lcthumon'.

2. In the Groups for Review window, select the Departmental group in the top portion of the window. The ID and name of all members of this group appear in the lower left data window. If a reviewer does not show up in the window, it is because that person has not been granted specific contract authority for the contract. You may need to grant specific contract authority to a user prior to performing this selection process.



3. Select (highlight) the name of at least one group member. The group members you select at this point will be the users that receive an In-Box message requesting their review of the change order.
4. Click the Add button. The selected name appears in the lower right data window. Select and add names as desired.
5. Click the OK button and then click the Save button.
6. Click Yes on the Mail is Sent Message.

Once the reviewers have posted their review comments, the comments can be found on the Change Order Tracking window.