QUICK GUIDE

CHANGE MANAGEMENT



CREATE AN ASSOCIATED BUDGET MOVE

- 1 Details 2 Select from & to items 3 Define relationships 4 Assign amounts
- 5 Adjust cost categories 6 Summary
- 1. Hover over the Actions drop-down menu.
- 2. Hover over Budget move & contract adjustment, then select Budget move.
- 3. Select the **Associated** workflow option.



- 4. Update the Budget move details, then click Next.
- 5. Select a cost item from the FROM and TO task list columns, then click **Next.**



- 6. Confirm the From > To relationship, then click **Next.**
- 7. Assign amounts to be moved from one cost item to another, then click **Next**.
- 8. Add or adjust cost categories as needed, then click **Next**.

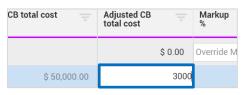


9. Review, then click **Submit**.

CREATE A CONTRACT ADJUSTMENT

START WITH COST ITEMS

- 1 Details 2 Cost items 3 Pay items 4 Summary
- 1. Hover over the Actions drop-down menu.
- 2. Hover over Budget move & contract adjustment, then select Contract adjustment.
- 3. Select the **Start with Cost items** option, enter contract details, then click **Next**.
- 4. Select (+) to add cost items.
- 5. Select 👯 to auto calculate your CB values to match your item's CE values.
- 6. Double-click in Adjusted CB total cost, MHrs or Qty field to make an adjustment.



7. Add Markup % and fees as needed, then click **Next**.

Markup =	Markup =	Fee
12.00 %	\$ 360.00	\$ 550.00

- 8. Adjust pay item quantity, price or unit of measure as needed, then click **Next**.
- 9. Use the read-only Summary tab to review, then click **Submit**.

QUICK GUIDE

CHANGE MANAGEMENT



CREATE A CONTRACT ADJUSTMENT

START WITH PAY ITEMS

- 1 Details 2 Select Pay items
- 3 Adjust pay item
- 4 Select CBS items

- 5 Assign amounts
- 6 Adjust cost categories
- 7 Summary
- 1. Hover over the Actions drop-down menu.
- 2. Hover over Budget move & contract adjustment, then select Contract adjustment.
- 3. Select the **Start with Pay items** option, enter contract details, then click **Next**.
- 4. Select the pay item(s) related to this change, then click **Next**.
- 5. Enter adjustments for your pay items in the Pending fields as needed, including overhead and profit.

	Current price		Current unit price	Current pay qty
Original	\$ 1,821,092.28		\$ 2,276.37	800.00
Pending	182,109.23	<u></u>	0.00	80.00
New value	\$ 2,003,201.51		\$ 2,276.37	880.00

- 6. Click Next.
- 7. Select the associated cost item(s), then click **Next**.
- 8. Enter adjustments for your cost items in the Pending fields as needed, then click **Next**.

	Current budget		MHrs	
Original		\$ 800,000.00		16,000.00
Pending		80,000.00		100.00
New total:		\$ 880,000.00		16,100.00

- 9. Add or adjust cost categories as needed, then click **Next**.
- 10. Use the read-only Summary tab to review, then click Submit.

APPROVE A CHANGE ORDER

- 1. Select the Change Register tab.
- 2. Click on a submitted entry with a status of Pending.

Net Qty — change	Notes	Status	Total – budget cost
1,452.50	Q	€5 Pending	\$ 1,376.2
1,952.50	2	€5 Pending	\$ 1,850.0
5.00	0		\$ 25,000.0

- **Review** gives you a read-only view of the change order.
- **Reject** Ends the change order and prevents it from updating the budget.
- **Revise** re-opens the change order for editing and re-submittal.
- **Approve** makes the changes final and updates the project's price and cost.



3. Click the **Approve** button.

