

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.

☒ **Associated**
Define budget moves with a From and To process to provide ultimate traceability of budget moves.

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**.

From :				→	To (for net zero moves):			
☐	CBS position	Description	WBS phase code		☐	CBS position	Description	
☐	▼ 4	Structural Steel	1073		☐	▼ 4	Structural Steel	
☒	4.1	Erect Steel - Heavy	1074		☐	4.1	Erect Steel - Heavy	
☐	4.2	Erect Steel - Light	1005		☒	4.2	Erect Steel - Light	
☐		Related Components	1006		☐		Related Components	

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**.

4.2 Erect Steel - Light			
		CB total cost	
	Labor	\$	200,000.00
=	Totals	\$	200,000.00
<input checked="" type="button" value="Add cost category"/>			

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.

CB total cost	Adjusted CB total cost	Markup %
	\$ 0.00	Override M
\$ 50,000.00	3000	

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	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		Pending	\$ 1,376.2
1,952.50		Pending	\$ 1,850.0
5.00		Approved	\$ 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.

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