Quick Reference Guide -- Change Order Reports

This article is intended to guide the user in the creation of a change order report in Cognos. Please read this QRG thoroughly before generating your change order report. It is important that the instructions below are followed in order to obtain the correct results.

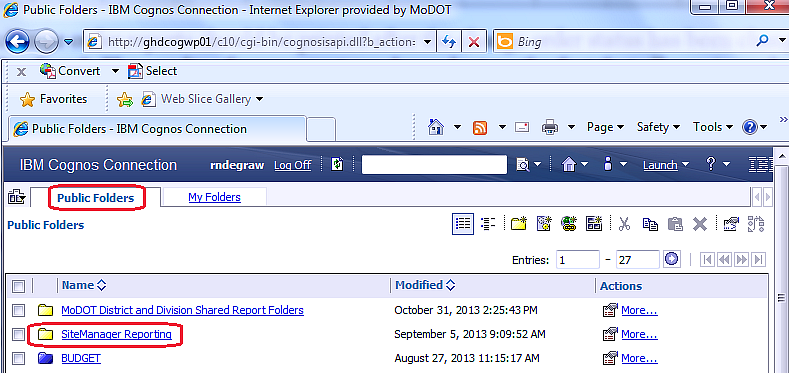
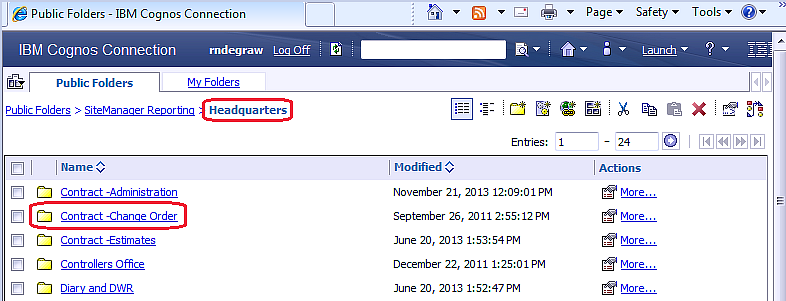
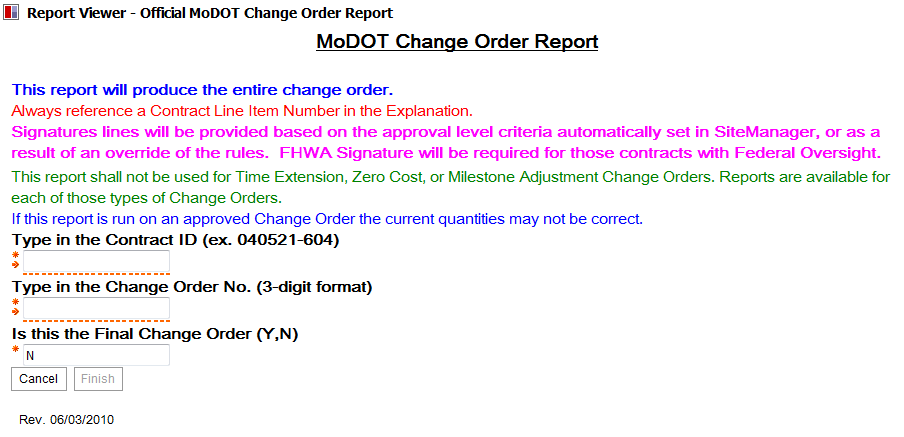
There are four change order reports located in Cognos – Official MoDOT Change Order Report, Official MoDOT MILESTONE ADJUSTMENT Change Order Report, Official MoDOT TIME ADJUSTMENT Change Order Report, and Official MoDOT ZERO DOLLAR Change Order Report.

The “Official MoDOT Change Order Report” must be used for changes to **Contract Items**. Make sure you are associating the change order reasons to specific line items. If you are not, the reasons will not print correctly on the report.

All change order reports should be printed after the change order status has been changed from "Draft" to "Pending." The results of your report are dependent on the fact that all previous change orders, with the exception of Zero Dollar or Time Extension change orders, **MUST** be in "Approved" status.

All established Policies should be followed. For instance, Categories must be entered for contingent items; the reasons **MUST** be associated to specific line numbers, etc.

# Generating the Change Order Report

1. Start Cognos on your computer.
2. Navigate to the Public Folders. From there, select SiteManager Reporting.  
   
3. Open the Headquarters folder, then select the Contract - Change Order folder.  
   
4. Select the appropriate change order report.   
   
5. When the report opens, you will be prompted for specific information. The “Official MoDOT Change Order” prompt boxes are shown in this example. Information required may be different for the other types of change order reports.   
   
6. All prompts are required. Information must be entered exactly as it appears in the system. For example, Change Order 1 must be entered as “001”.
7. Select the “Finish” button to generate the report.

# Saving the Change Order Report

SM updates the header information each time a change order is generated. Therefore, you **must** save the report so the header will correctly reflect the contract information at the time of the report was created.

**Policy:** Change orders shall be saved in .PDF format to the V: drive in the following path for your district and org code: **V:\Contract Information Archive\District # \ ORG # \ Contract ID \Change Orders\Pending**. (See Note below.) File name should include the change order number placed within the file name so the change orders will sort properly when listed in the folder. See example below:



Once the change order is saved, it should be sent as an attachment in an email to the contractor for signature.

Once the change order has been approved at all levels, it shall be saved with all attachments in a single file to **V:\Contract Information Archive\District # \ ORG # \ Contract ID \Change Orders\Completed**.

**Note:** When distributing a change order electronically for signature, it should be stored with appropriate attachments in a single file in the “Completed” change order folder and linked from there.  (Attachments not normally sent to the contractor should be saved in the “Supporting Documents” folder.”) Once the last digital signature is applied, the process is ***complete.***  No further action is necessary on the part of the project office, that is, there is no movement of the document from one folder to another.