



STATE OF NEW JERSEY

SCHOOLS DEVELOPMENT AUTHORITY

Section 26

Change Management

Change Management Division Only

ORACLE Primavera

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I. Entering SDA's Internal Estimate of Change Value

The SDA's internal Contract Management Division (CMD) will enter their estimates of the value/cost, time extensions, and additional documents required for the change on the **Change Management** document.

IMPORTANT: Only CMD staff should enter or edit data in this section.

NOTE: If you are beginning from this point, perform the following steps to open the **Change Management** document:

- *Log in to Contract Management*
- *Locate your project from the project list*
- *Choose the Change Order Management folder, then choose Change Management*
- *Locate your desired Change Management document from the log and open in edit mode*

1. With the **Change Management** record open, click the **SDA Data** tab.

The screenshot displays the 'Change Management' interface for record 00118. The 'SDA Data' tab is highlighted with a red box. The interface includes a navigation bar with tabs for General, Status, Budget, Commitments, Remarks, Documents by Phase, Details, SDA Data, Issues, and Attachments. Below the tabs, there are input fields for Number (00118), Dated (Mar 27, 2009), and Title (NT-0032-C04 CO #221). A table shows cost data for Budgeted and Committed phases. At the bottom right, there are Save and Cancel buttons.

Phase	Estimated Cost	Quoted Cost	Negotiated Cost	Final Cost	Projected Cost
Budgeted	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Committed	\$0.00	\$0.00	\$0.00	\$5,119.00 (1 of 1)	\$5,119.00

2. Scroll to the section marked **For CMD Use Only** and complete the following fields:

The screenshot shows a software interface for 'Change Management: 00118 | NT-0032-C04 CO #221'. The 'SDA Data' tab is selected and highlighted with a red box. A red arrow points to the 'FOR CMD USE ONLY' section. The form contains the following fields:

Program Operations Team	<input type="text"/>	...	X
Contract Number	<input type="text"/>		
Change Order Type	<input type="text"/>	...	X
Change Order / Amendment Number	<input type="text" value="0"/>		
Vendor Name	<input type="text"/>		
Program Officer	<input type="text"/>		
Brief Description	<input type="text"/>		
Contract Verification	<input type="text"/>		
Time Extension Requested	<input type="text" value="0"/>		
Date CMD Received	<input type="text"/>		
CMD Reviewer	<input type="text"/>	...	X
Target Release Date	<input type="text"/>		
Proposed Amount (\$)	<input type="text" value="0.00"/>		
Initial Assessment Value (\$)	<input type="text" value="0.00"/>		

Buttons for 'Save' and 'Cancel' are located at the bottom right of the form.

- **Program Operations Team:** Click the select button to choose the applicable Program Operations Team
- **Contract Number:** Enter the contract number (20 characters)
- **Change Order Type:** Click the select button to choose the change order type from the drop down list
- **Change Order / Amendment Number:** Enter the applicable document number
- **Vendor Name:** Enter the name of the vendor (100 characters)
- **Program Officer:** Enter the name of the program officer (30 characters)
- **Brief Description:** Enter a brief description of the change requested (300 characters)
- **Contract Verification:** Enter applicable contract section relating to this change
- **Time Extension Requested:** Enter time requested by the vendor
- **Date CMD Received:** Select the received date by using the calendar icon
- **CMD Reviewer:** Click the select button to choose the reviewer's name
- **Target Release Date:** Click the calendar icon to enter the target release date
- **Proposed Amount (\$):** Enter the proposed dollar value
- **Initial Assessment Value (\$):** Enter the initial assessment dollar value
- **CCD Value (\$):** Enter the CCD dollar value
- **RCO/Revised CO Value (\$):** Enter the RCO/revised CO dollar value
- **Released Amount (\$):** Enter CMD's dollar value
- **Variance (\$):** Enter the difference between the Proposed Amount and the CMD Amount Released
- **CMD Recommended Time Ext:** Enter the recommended number of days for contract extension
- **Date 1st Add'l Info Request Sent:** Select the appropriate date by using the calendar icon

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- **Additional Documents Required 1/2/3:** Select the appropriate document by using the select button
 - **Date Received 1/2/3:** Select the received date by using the calendar icon next to the field
 - **Date All Add'l Info Requests Rec'd:** Select the appropriate date by using the calendar icon
 - **Fact Finding Meeting:** Select the appropriate date for the meeting using the calendar icon
 - **Final Negotiation Meeting:** Select the appropriate date for the meeting using the calendar icon
 - **CMD Comments:** Enter any applicable comments
 - **Next Action:** Enter a description for the next action
 - **Goal Date for Next Action:** Select the appropriate date by using the calendar icon
 - **Change Review Status:** Click the select button to choose the appropriate status
 - **Released Date:** Click the calendar icon to enter the released date
 - **Date RTN Proposed:** Select the appropriate date for the proposed Request to Negotiate document using the calendar icon
 - **Time Extension Approved:** Enter time approved by CMD
 - **Supervisor Approval Date:** Click the calendar icon to enter the supervisor's approval date
 - **Supervisor Approval Name:** Click the select button to choose the name of the supervisor
 - **Date Change Order Executed (S):** Change Order execution date will be automatically populated from SIMS

Cost Recovery Only

- **Identify as Error or Omission:** Click the select button to choose error, omission or both
- **Potential Cost Recovery Item:** Enter a description of the potential cost recovery item
- **Potential Value of Delay(\$):** Enter the potential dollar value of the delay
- **Contractor Delay Due Design Deficiency:** Click the select button to choose yes or no

Potential Value of Recovery

- **Error(\$):** Enter the potential dollar value for a recovery based on error
- **Omission(\$):** Enter the potential dollar value for a recovery based on omission

3. When all entries are completed, click the **Save** button at the bottom of the screen.

The screenshot displays the 'Change Management' interface for item 00126 | NT-0032-C04 #238. The 'SDA Data' tab is active, showing a list of fields for data entry. The fields include:

- CCD Justification
- DCD Justification
- FOR CMD USE ONLY** (checkbox)
- Program Operations Team (dropdown menu with a red 'X' icon)
- Contract Number
- Change Order Type (dropdown menu with a red 'X' icon)
- Change Order / Amendment Number (text input with '0' entered)
- Vendor Name
- Program Officer
- Brief Description
- Contract Verification

At the bottom right of the form, the 'Save' button is highlighted with a red rectangle, and the 'Cancel' button is visible next to it.

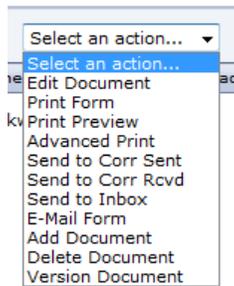
II. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

A. Create a Document Version

1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.



3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.

