

CHANGE ORDERS

Once you've established Contracts in ProjectTeam.com, you can start creating Change Orders against those Contracts. The **workflow** follows the steps for the Change Order approval processes. The first step sends the record to the **Project Manager (PM)** for approval. When the PM passes the workflow, the **SAP Administrator** is notified with instructions to run the applicable Merge Template to submit to SAP. If approved, the SAP Administrator will pass the workflow which notifies the **Procurement Team**.



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CREATING A CHANGE ORDER

- 1) Click the **New** button from the Change Order log view.
- 2) The User will be prompted to choose a contract. Use the **Search** box at the top of the form to easily locate the contract and select the contract by using the **radio** buttons to the left of the contract subject. Once selected click the **Choose Contract** button at the bottom of the form.

Choose Contract				
Contract # ↑↓	Subject ↑↓	Vendor (Recommended/Awarded) ↑↓	Type ↑↓	
☐ HMC-451	Training Center Rental and Fitout Works Agreement/ HMC-0450 V2	Doğa Denetim İş Sağ. Güv. Eğit. Ve Danış. Hiz. A.Ş. (Doğa HSE)	Subcontract	
☐ 48573	Steel Erection		Subcontract	
☒ HMC-0422	Ausenco Engineering	Ausenco	Contract	
☐ HMC-0062	Geological Investigation Drilling Works	Ausenco	Contract	

- 3) Enter the **Subject**
- 4) Enter the **Change Order Date**
- 5) Enter the **Description of Change**.

Subject *
New Exploration
Contract Reference ⓘ
HMC-0062 - Geological Investigation Drilling Works
Contract Date
9/1/25
Change Order Type
Contract
Change Order # *
0001
Change Order Date
08/05/2025
Contract Manager
Byron Alexander
Vendor
Ausenco
Vendor Contact
Brian Rothery
Description of Change
New Exploration

- 6) Enter the **Justification of Change**.
- 7) Click the **Trend Notice Required?** checkbox if required.
- 8) Enter the **Estimated Value of This Change**
- 9) In the **Purpose of Change** section, click the checkbox next to the applicable **Purpose** and enter any **Notes**.

Justification of Change
Increase capacity.

Trend Notice Required?
☐

Estimated Value of This Change
\$750,000.00

Purpose of Change

☐	☐	Select	Purpose	Notes
☐	☐	☐	General Indirect	
☐	☐	☒	Engineering	
☐	☐	☐	Construction	
☐	☐	☐	Office Cost	
☐	☐	☐	Site Indirect	
☐	☐	☐	HSSSER & Permits	
☐	☐	☐	Exploration	
☐	☐	☐	S/C or Vendor Backcharge (Name & Contract or PO #)	
☐	☐	☐	Other	

- 10) Enter **Change Notes**.
- 11) In the **Recommendation for Variation Data**, click the **Create New** button to enter **Complete the following for the RFV** data in the field and click the **Add** or **Add & New** link to add additional items.
- 12) Enter **Stamp Duty**.
- 13) Enter **Legal Review**.
- 14) Enter **1. Narrative**.
- 15) Enter **2. Amendment Process**.
- 16) Enter **2A. Commercial Evaluation**.
- 17) Enter **2B. Technical Evaluation**.

Change Notes

Additional Engineering for Paste Plant

RECOMMENDATION FOR VARIATION DATA

Complete the following for the RFV.

Create New

Stamp Duty

Legal Review

1. Narrative

2. Amendment Process

2A. Commercial Evaluation

2B. Technical Evaluation

- 18) Enter **3. Budget.**
- 19) Enter **4. Key Legal, Commercial, Risk, and Liabilities.**
- 20) Enter **5. Attachments.**

3. Budget

4. Key Legal, Commercial, Risk, and Liabilities

5. Attachments

21) Enter **This Change Order (Days)**.

Previous Contract Completion Date
6/22/26

This Change Order (Days)
5

Revised Contract Completion Date ⓘ
6/27/26

Approval Sequence

22) Click the **Save** button to save the data.

23) Click the Change Detail tab and the **Edit** button to add the details of this Change Order.

 DETAILS Edit

General Change Detail

Change Details ↗ ⋮

Source Type	Account Code	Description	Ref #	UOM	Qty	Unit Price	Approved Value
Manual	1112-AC - South Valley Lower Rock Waste Dump (Ground Stabilisation/ Slope Protection)	Additional Engineering for Paste Plant		HR	250	\$175.00	\$43,750.00
							Total \$43,750.00

24) Click the **Create New button** to add details for the Change Order manually.

25) The Add Change Details modal window will open. Complete the details for this change and click the **Add** button to save the entry.

Add Change Details

Source Type
Manual

Account Code
1112-BC - South Valley Lower Rock Waste Dump (Structural Excavation) x

Description
New Design Requirements

Ref #

UOM

Cancel Add & New Add

- 26) The information will populate the **Change Details**.
- 27) Use the **dropdown menu** to the left of each line item should you need to Insert above, Insert below or Remove items from the Change Details.
- 28) Click the **Save** button to save the entry.

Note: The following fields are non-editable and are populated based upon data from either previous approved Change Orders or the Contract selected.

Contract Reference The first step in creating a new Change Order is selecting a Contract. The Contract Reference field is a concatenation of the selected Contract # and Contract Subject fields.

Contract Date The date of the original Contract.

Change Order Type The Change Order Type is derived from the Contract Type. There are two options for this field, either "Contract" or "Subcontract" and they match the two options available on the Contract form.

Vendor

Original Contract Value The total value of the related Contract from when the first related Change Order was created. This Original Contract Value does not reflect any existing Change Orders.

Sum of Previously Approved Changes (Value) The total of all previously approved Change Orders related to the referenced Contract.

Previous Contract Value Original Contract Value + Sum of Previously Approved Changes (Value)

This Change Order (Value) The total amount of the currency Change Order.

Revised Contract Value Previous Contract Value + This Change Order (Value)

Original Contract Completion Date Contract Completion Date from the referenced Contract

Sum of Previously Approved Changes (Days) The total of all previously approved Change Order days related to the referenced Contract.

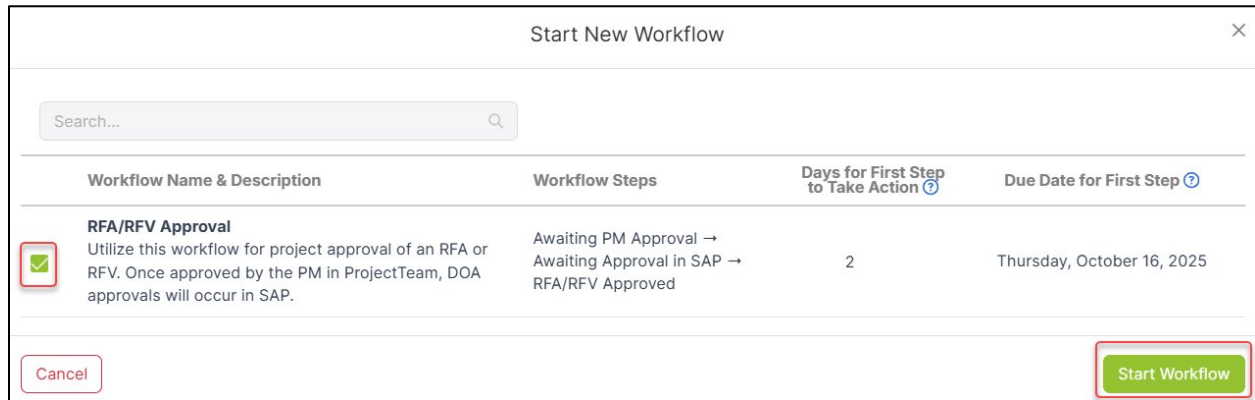
Previous Contract Completion Date Previous Contract Completion Date from the referenced Contract.

Revised Contract Completion Date Revised Contract Completion Date from the referenced Contract.

Approval Sequence Sequence of approval

START THE WORKFLOW

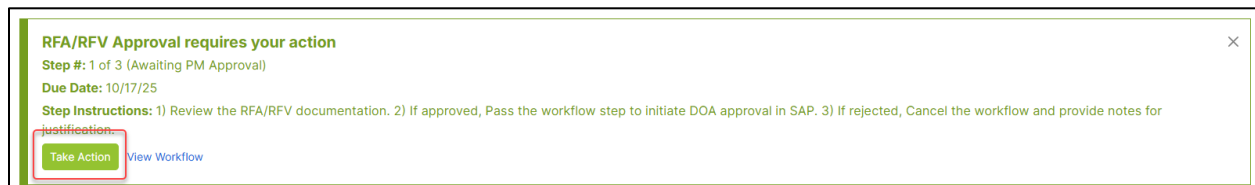
- 1) After a record is saved, a user can navigate to the Workflows panel of the open record and click **Start New** to open the workflows.
 - a. Click **Start New** in the Workflows panel of an existing record.
 - b. Check the box beside the applicable workflow.
 - c. Click **Start Workflow** to send the first workflow step to the PM for review and approval. See [*Approve for SAP Submittal*](#) in this QRG.



Workflow Name & Description	Workflow Steps	Days for First Step to Take Action	Due Date for First Step
☒ RFA/RFV Approval Utilize this workflow for project approval of an RFA or RFV. Once approved by the PM in ProjectTeam, DOA approvals will occur in SAP.	Awaiting PM Approval → Awaiting Approval in SAP → RFA/RFV Approved	2	Thursday, October 16, 2025

APPROVE FOR SAP SUBMITTAL

- 1) When the workflow is started the **Project Manager** will be assigned the first step.
 - a. **Review** the applicable section of the record.
 - b. Click **Take Action** from the top of the page or from the Workflow panel.



RFA/RFV Approval requires your action

Step #: 1 of 3 (Awaiting PM Approval)

Due Date: 10/17/25

Step Instructions: 1) Review the RFA/RFV documentation. 2) If approved, Pass the workflow step to initiate DOA approval in SAP. 3) If rejected, Cancel the workflow and provide notes for justification.

Take Action View Workflow

- c. If Approved, **Pass** the workflow step to initiate DOA approval in SAP.
 - i. **Pass** moves the workflow to the SAP Administrator with instructions to submit the RFV in SAP for approval.
 - d. If Rejected, **Cancel** the workflow and provide notes for justification.
 - i. **Cancel** notifies the workflow initiator and marks the workflow Cancelled.
 - ii. The Procurement Team can **Restart** the workflow at any time.

X
RFA/RFV Approval

⚠ You are taking action on **Step 1 (Awaiting PM Approval)** for Change Order: Additional Engineering for Paste Plant.

1) Review the RFA/RFV documentation. 2) If approved, Pass the workflow step to initiate DOA approval in SAP. 3) If rejected, Cancel the workflow and provide notes for justification.

Your action

☒ **Pass**
Mark as "Passed" and move forward to the next step (Step 2 - Awaiting Approval in SAP).

☐ **Cancel**
Mark as "Cancelled" and stop the workflow

Notes

Days for next step to take action: ⓘ

5

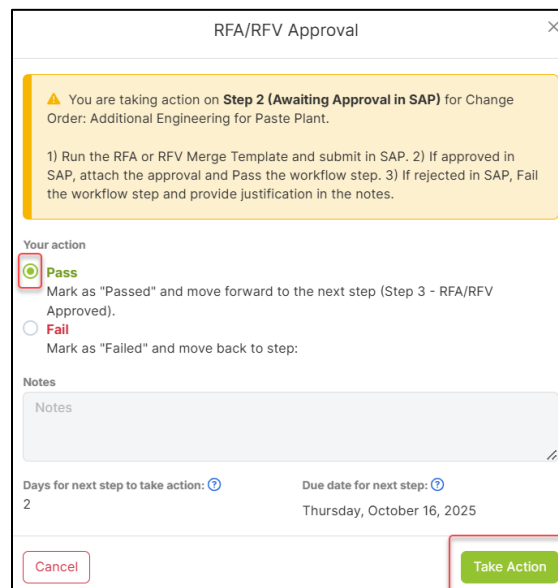
Due date for next step: ⓘ

Sunday, October 19, 2025

Cancel
Take Action

SUBMIT TO SAP

- 1) When the Project Manager approves the RFV and passes their workflow step, the workflow moves to the **SAP Administrator** with instructions to submit in SAP for approval.
 - a. If **Approved in SAP**:
 - i. Open the record and click **Approve Contract** from the top of the page.
 - ii. Upload the approval to the **Attachments** panel of the Contract record. See [Adding Attachments to Forms](#) in the help pages for more help.
 - iii. Click **Take Action** from the top of the page or from the Workflow panel.
 - iv. Enter any applicable **Notes**.
 - v. **Pass** the workflow step. Pass returns the workflow to the Procurement Team.
 - b. If **Rejected in SAP**:
 - i. Click **Take Action** from the top of the page or from the Workflow panel.
 - ii. Provide justification in the **Notes**.
 - iii. **Fail** the workflow step. Fail returns the workflow to the PM.



PROCEEDING WITH AN APPROVED RFV

- 1) When the RFV is approved in SAP and the SAP Administrator passes the workflow step, the workflow will be returned to the **Procurement Team** with instructions for proceeding.
 - a. Share the record with the vendor and provide notification to proceed per the RFV.
 - b. Click **Take Action** from the top of the page or from the Workflow panel.

RFA/RFV Approval requires your action

Step #: 3 of 3 (RFA/RFV Approved)

Due Date: 10/17/25

Step Instructions: 1) Share the record with the vendor and provide notification to proceed per the RFA/RFV. 2) Pass the workflow step to complete the workflow.

Take Action View Workflow

c. **Pass** the workflow step to complete the workflow.

RFA/RFV Approval

⚠ You are taking action on **Step 3 (RFA/RFV Approved)** for Change Order: Additional Engineering for Paste Plant.

1) Share the record with the vendor and provide notification to proceed per the RFA/RFV. 2) Pass the workflow step to complete the workflow.

Your action

☒ **Pass**
Mark as "Passed" and move forward to the next step (Workflow "Done").

☐ **Fail**
Mark as "Failed" and move back to step:

Notes

Notes

Days for next step to take action: ? Due date for next step: ?

N/A N/A

Cancel Take Action

RELATED RESOURCES

Help Pages:

[Start a workflow on a document](#)

[Print a Merge Template](#)

[Adding Attachments to Forms](#)

Additional Resources:

Contracts