

Gold Support Webinar Series: Revisions and Change Orders

This webinar was created to provide an introduction to revisions and change orders with 30 - 40 minutes of feature introduction and demonstration followed by a Q&A period.

Session Topics

- Project Revisions and Pre-Sale Workflow
- Managing Revisions and Project Approval
- Mark Project as Approved
- Mark Project as Unapproved
- Creating Change Orders
- External Change Orders
- Change Order Reports
- Internal Change Orders

Notes

Project Revisions and Pre-Sale Workflow

- **What is a Project Revision?**
 - SI manages snapshots of a project's data called "Revisions"
 - Revisions are read only copies of the project at the moment they were created and are separate from the project data
- **Why store Project Revisions?**
 - Revisions help users manage pre-sale workflow and present options to their customers
 - As a customer requests changes prior to contract, simply create a new revision, make the updates and issue a new proposal
- **The Revision "Compare" option tracks how Revisions differ**
 - Revision comparisons show additions, deletions and changes
 - Reports can be run on this data to reflect the change
 - The project and revisions can be compared to see what is different between them
 - Comparisons can be project to revision or between two revisions

Notes

ACTIVITY 1 - CREATE A PROJECT REVISION AND MAKE SOME CHANGES

1. Click Start → Projects → Manage Projects.
2. Select your project from the list (single-click.)
3. Below the list of projects, you will see six tabs. Click on Revisions, then click Create.




4. The

Create Revision dialog box opens. Click in the Notes text box and type a short description (the state of the project estimate **before** the revision.) Now click OK.

5. You have saved a snapshot of the project in the current state.
6. Now open your project (not the revision) and make some changes:
 - a. Add a product.
 - b. Delete a product.
 - c. Replace a product.
 - i. Select the product, right-click, choose Replace → Product.
 - ii. Select a new product.
7. Now you have a new version of the project to present as a proposal.
8. Save and close your project (click disk icon, upper-left, 'X' upper-right.)

Notes

ACTIVITY 2 - COMPARE REVISIONS AND RUN A REPORT TO REFLECT THE DIFFERENCES

1. Select your project from the list (single-click.)
2. Verify the project is checked out to you. Your SI user name should be listed in the Checked Out To field in the project listing. If no name is listed, click Check Out from the command ribbon above. If another user name is listed, ask that user to check in the project (or ask for assistance).
3. Below the list of projects, click on Revisions.
4. Click Compare.  Compare
5. The Project Revisions Comparison Selector opens, showing a listing of Revisions in the project. You will likely only see two revisions and they will already be selected (if not, select two revisions or the project and one revision.) Click Compare.
6. The Project Compare Editor opens, showing all additions, deletions and changes made between the two revisions.
7. Click Reports and choose a report category. Pick a report to run.
8. The resulting report will only show what is different between the two Revisions.

Notes

Managing Revisions and Project Approval

- SI offers an intuitive interface for managing a project's contract value
- When a client accepts your proposal
 - You verify which version was accepted and "Promote as Project" if it is not the current project
 - Then you set the project as "Approved"
- All items are marked as approved and price fields are locked
- Optional and Alternate items are removed from the project
- SI captures a Revision of the project and shows it as Approved
- At this point all project changes are managed using Change Orders
- SI automatically manages Revisions as part of this process
- Manual revision management is disabled after Project Approval
- While Revisions and Change Orders complement each other, they are not the same thing
- A Change Order represents pending, approved or rejected changes
- A Revision captures the state of the entire project at a moment in time

Notes

ACTIVITY 3 - USE PROMOTE AS PROJECT TO SET A REVISION AS THE CURRENT PROJECT FILE

Note: Since Revisions allow us to modify and present different versions of a project prior to acceptance, we need to have the option of choosing a previous Revision and making it the current Project again.

1. Select your project from the list (single-click.)
2. Verify the project is checked out to you. If necessary, follow the steps in the previous activity.
3. Below the list of projects, click on Revisions.
4. Choose the Revision to promote.
5. Click Promote as Project.
6. The Promote Revision dialog box opens, showing two choices.
 - a. Choose 'Backup current project as a new revision' if you want to save a copy of the current project state.
 - b. Or choose 'Do not backup current project as a revision...' which will NOT SAVE the current project state.
7. Click Promote.
8. If you chose to backup the current project, the Create Revision dialog box will open. Add Notes as necessary and click OK.

Notes

ACTIVITY 4 - MARK PROJECT AS APPROVED

1. Select your project from the list (single-click.)
2. Verify the project is checked out to you. If necessary, follow the steps in the previous activities.
3. If the current version of the Project is to be Approved, simply click the Mark Project as Approved button on the Home tab. Otherwise, use the Promote as Project feature before marking the project as approved.
4. The Mark Project as Approved dialog box opens.
 - a. SI sets the Project Status to the first Status with a State of Won. You can manually change this if necessary.
 - b. SI automatically creates a Revision of the Project with the note 'Approved project revision.' You can manually change the notes if necessary.
 - c. Click Mark as Approved.
5. A check mark will now be visible in the Approved column within the Project Explorer view.

Notes

Mark Project As Unapproved

- After a project has been approved, it can be “Unapproved”
- If a project is marked as unapproved, all Revisions (from contract forward) and Change Orders will be deleted
- SI will attempt to set the project status to the first status with an open state
- Permissions do exist to limit a user’s ability to mark projects as approved/unapproved

ACTIVITY 5 - MARK PROJECT AS UNAPPROVED

1. Select your project from the list (single-click.)
2. Verify the project is checked out to you. If necessary, follow the steps in the previous activities.
3. Click the Mark Project as Unapproved button on the Home tab.
4. The Mark Project as Unapproved dialog box opens.
 - a. SI resets the Project Status to the first listed Status. Manually change this if necessary.
 - b. Click Mark as Unapproved.
5. The Approved column check mark will be removed within the Project Explorer view.

Note: Remember that all previous Revisions and Change Orders WILL BE DELETED!

Notes

Creating Change Orders

- After a project has been approved, any attempt to make changes requires the creation of a Change Order
- SI prompts the user to select or create a Change Order at this point
- Change Orders can also be initiated directly from the Change Order tab
- Change Orders have a name, number, type and status
- Change Order Type can be:
 - External, or client-facing (change in equipment, change in scope)
 - Internal, for “engineering changes” that do not change the contract amount (new model or fulfillment of an allowance)
- Change Order Status is Pending, Approved or Rejected
- Change Orders have unique:
 - Scope of Work
 - Price Adjustments
 - Taxes
 - Misc. Items

Notes

External Change Orders

- When a customer asks for changes, create an external Change Order
- Additions and deletions change the value of the project
- Items cannot be deleted directly
- In a change order, an item can only be “marked for deletion”
- Items marked for deletion appear with a line through them in the project
- If the CO is approved, the item will be deleted
- If the CO is rejected, the item will remain
- An Undelete function is now available to remove an item marked for deletion on a change order
- Added items appear with a “plus” icon to show they are additions
- All changes reflect the CO number

Notes

Change Order Reports

- Change Orders do not require special “change order” reports
- Standard SI reports are automatically labeled as Change Order by default
- A report setting allows for the label to be edited
- When attempting to run a report on an approved project with pending change orders, SI requires the user to choose to run the report for:
 - All approved items
 - One of the pending change orders
- To run a report for an approved change order, open the CO directly from the Change Orders tab in the Project Explorer

Notes

ACTIVITY 6 - CREATE AN EXTERNAL CHANGE ORDER

1. Select your project from the list (single-click.)
2. Verify the project is checked out to you. If necessary, follow the steps in the previous activities.
3. Below the list of projects, click on Change Orders.
4. The New Change Order dialog box opens. A Change Order Name will be populated. Change the name if necessary.
5. Choose External for the Change Order Type.
6. Add Notes to describe the changes. Click Save.
7. A Change Order will be added to the list of Change Orders. The Status will be Pending and the Price will be zero dollars (\$0.00).
8. Double-click the Change Order to open the Project and begin making changes.
9. The default project view will be filtered to the Change Order that you opened. Use the Change Order filter to show items from:
 - a. The current Change Order or other Pending Change Orders
 - b. The Approved Project
 - c. A combination of these
10. Added items will be displayed with a + next to them and the text will be green.
11. When deleting items, they will be 'marked for deletion.' These items display with an X next to them and all the fields display with a strike-through.
12. Consider making changes to the Scope of Work, Price Adjustments or Taxes.
13. If the Change Order Filter is set to only show a Change Order, reports will automatically be set to run for that CO. Otherwise SI will prompt the user to select what data the report should use.

Notes

Internal Change Orders

- Internal Change Orders allow for changes that the customer need not see
- Possibilities include:
 - minor updates to the BOM for model updates
 - Replacing equipment allowances with actual equipment that can be ordered
 - Items that were originally missed in the design but are required
- SI prompts the user to set added items as Non-billable on internal change orders. The goal is to maintain the contract value
- An item marked for deletion on an internal change order will affect the project price once approved
- It is best not to remove items from an internal change order
- Instead use the Replace feature which offers:
 - Maintain Installation Prices
 - Keep Accessories

REMEMBER, ACCESSORY ITEMS MAY HAVE ALREADY BEEN INSTALLED

Notes

ACTIVITY 7 - CREATE AN INTERNAL CHANGE ORDER

1. Select your project from the list (single-click.)
2. Verify the project is checked out to you. If necessary, follow the steps in the previous activities.
3. Below the list of projects, click on Change Orders.
4. The New Change Order dialog box opens. A Change Order Name will be populated. Change the name if necessary.
5. Choose Internal for the Change Order Type.
6. Add Notes to describe the changes. Click Save.
7. A Change Order will be added to the list of Change Orders. The Status will be Pending and the Price will be zero dollars (\$0.00).
8. Double-click the Change Order to open the Project and begin making changes.
9. When adding items, SI will prompt the user to mark as Non-Billable.
10. When deleting items, they will be 'marked for deletion.' SI will notify the user that deleted items will CHANGE THE PROJECT VALUE when the Internal Change Order is Approved.

Notes

ACTIVITY 8 - RESOLVE A CHANGE ORDER

1. Change Orders have a Status of Pending until action is taken to resolve them.
2. When the project stakeholder approves a Change Order, select it from the Change Order list and click Mark as Approved.

Note: External Change Orders should be approved by the customer. Internal Change Orders should be approved by a member of your team (project manager, operations manager, owner, etc.)

3. The Approve Change Order dialog box opens. A new Revision will be created. Approval notes will be placed in the Notes field. Click the Append Change Order Notes link to add those notes to the Notes section as well.
4. Click Mark as Approved.
5. If the Change Order is rejected, click Mark as Rejected. A read-only version of the CO will be saved.

Notes

Training content complete

- Questions?

- Support Resources Available
 - D-Tools Application Home Page Links
 - [Documentation](#) – open the Support Wiki
 - [Support Ticket](#) – open the web page to create a support ticket
 - [Chat With Us](#) – Launches Chat Support
 - From any D-Tools software interface, click Learn More
 - Found in the upper-right corner
 - Launches the Support Wiki
 - Open the Support Wiki directly at support.d-tools.com
 - Send an email to support@d-toolshelp.com
 - Call 866.386.6571

Notes
