

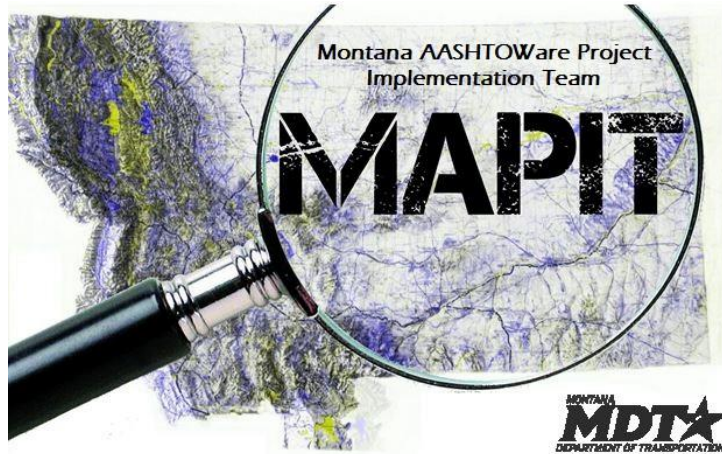


MONTANA DEPARTMENT OF TRANSPORTATION  
AASHTOWare Project Construction and Materials



MDT Procedure  
Process: Unattached Items

Date: October 10, 2017  
Updated: August 26, 2019





## MONTANA DEPARTMENT OF TRANSPORTATION AASHTOWare Project Construction and Materials



### □ **Process Definition**

The use of unattached items is a way that a new item can be added to the contract before the price has been negotiated. This is to allow an inspector to track the quantities immediately. Typically, this would be for emergency type situations where the item needs to be installed and tracked before the change order is complete.

The work and use of unattached items needs to be discussed with the DCE since the work will likely require emergency or prior approval.

The unattached item cannot be paid for until the change order is approved.

### □ **Acronyms and Definitions**

MDT – Montana Department of Transportation

### □ **MDT Procedure**

1. Create a new change order to be used later for the extra work

Navigation: Construction > Contract Progress > (select contract) > Change Orders tab

- a. Click Add
- b. Enter a Description
- c. Select the Approval Rules
- d. Select the primary Reason for the change order
- e. Click Save

2. Add a dummy item to the change order

Note: when the unattached item is created, the system automatically generates the line item number. Once created, it cannot be modified. By creating a dummy item, the unattached items will be numbered correctly for the change order. The dummy item will be deleted in a subsequent step.

- a. On the New Items tab, click Select New Item
- b. In the Reference Item field, type 104030011 or some other item that is new to the contract
- c. Select the first category
- d. Click Add to Change Order
- e. Enter the Project Item Line Number (e.g. 905000)
  - i. Item number is six digits 9XXXXY
  - ii. XX is the change order number
  - iii. YYY is 000 for the dummy item so that the first unattached item will automatically be numbered 010
- f. Enter the same number in the Contract Item Line Number



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- g. Enter 1 in the Quantity
  - h. Enter \$1.00 in the Unit Price
  - i. Click Save
3. Add the unattached item to the contract
- a. Navigate to the Items link at the top of the page
  - b. Click Select Unattached Items
  - c. In the Item ID field, start typing the item number or description of the new item
  - d. Click on the item being added
  - e. Click on the Project/Category that the unattached item is being added to
  - f. Click Save
  - g. Add additional Unattached Items as needed
4. Delete the dummy item that was added to the change order

Navigation: Contract Progress > Change Order tab > (select change order) > New Items tab

Note, if you navigated to the items from your change order, you can just hit the Previous button.

- a. Under the item row action, click Delete

Contract Change Order Summary

Contract: 14415 - SF129 - GUARDRAIL BEARCREEK

Change Order: 0026 - Test unattached items      Amount: 1.00      Status: Draft

General

Increase/Decrease Items

New Items

Time Adjustments

Contract Claims

Review Tracking

Approval Tracking

Force Accounts

Plan Discrepancies

New Items

Projects

Type search criteria or press Enter      Advanced      Showing 1 of 1      No Filter

Select New Item...

Proj Item Ln Num	Cont Item Ln Num	Item - Descr	Supp Descr	Unit	Actions
926000	926000	104030011 - MISCELLANEOUS	Temporary Item	LS - Lun	
8051033000 - SF129 - GUARDI	0001 - INSTALL GUARDRAIL A	1.000	1.000000		<ul style="list-style-type: none"> <li>Delete</li> <li>Exclude from Search Results</li> <li>Views</li> <li>Attachments</li> <li>Links</li> <li>Tracked Issues</li> </ul>
Ext Amt		1.00			

Project Item Line Number: 926000      Unit Price: 1.00000

Contract Item Line Number: 926000      Extended Amount: 1.00

- b. Click Save
5. When prices for the new item(s) have been negotiated, add the Unattached Item(s) to the change order

Navigation: Contract Progress > Change Order tab > (select change order) > New Items tab



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Note, the change order checklist should be complete at this point, all discussions would have occurred and supporting documentation saved to the share drive.

- a. Click Select Unattached Items
- b. Click the item(s) being added to the change order

Select Unattached Item ✕

Advanced Showing 7 of 7

Contract Item Line Number  
No Filter

Select: All | None
3 selected

Cont Line Num	Proj Item Ln Num	Item - Descr	Suppl Descr	Unit
912010	912010	606011520, IMPACT ATTENUATOR		EACH - Each
912020	912020	605000090, CONCRETE BARRIER RAIL		EACH - Each
913010	913010	203030140, REMOVE UNSTABLE ROCK		UNIT - Unit
913020	913020	606010040, GUARDRAIL-STEEL BOX BEAM		LNFT - Linear Feet
<input checked="" type="checkbox"/>	926010	926010	606010335, MASH W-BEAM TERMINAL SECTION	EACH - Each
<input checked="" type="checkbox"/>	926020	926020	606010340, MGS TO METAL GUARDRAIL TRANSITION	EACH - Each
<input checked="" type="checkbox"/>	926030	926030	606010345, MGS ONE-WAY DEPARTURE TERMINAL SEC1	EACH - Each

- c. Click Add to Change Order
- d. Enter the Quantity
- e. Enter the Unit Price
- f. Enter a Supplemental Description, if needed
- g. Select the Funding if the item is on a new category or has new funding
- h. If an existing subcontractor is doing the work, select the Subcontractor field
- i. Clive Save

6. Complete the change order following the normal process (see CO\_NP\_Change\_Orders\_V1.docx). This would include adding the explanation, applicable time and the review and approval process.

- IT Systems Interfaces Outside of AASHTOWare Project**
- Process Exceptions**
- Business Change Summary**

This is a major change. This functionality does not exist in SiteManager. Currently, people have to use Excel or some other method to track items and quantities before the change order is complete.

- Comments**

This does not supersede the need to negotiate prices and complete a change order before the work begins.