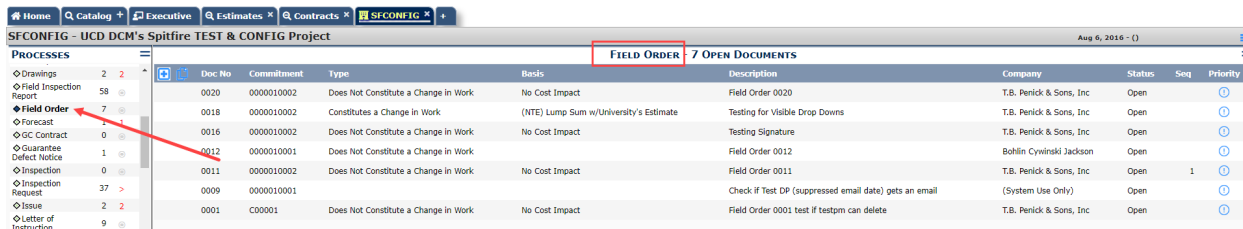


## Field Order Guide for PM's

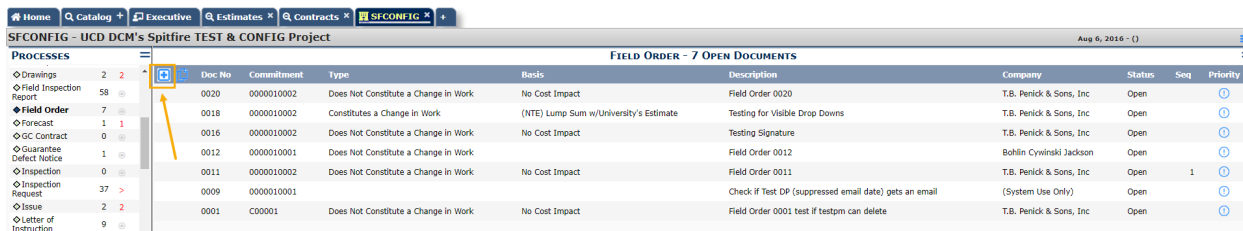
This guide provides you the steps you will need to create and route a Field Order.

### How to create a Field Order

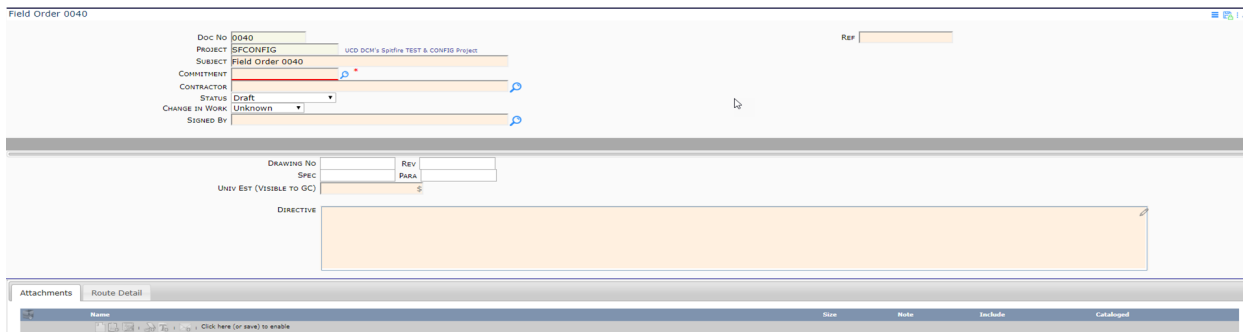
To create a Field Order, you need to log into the System and go to your Project Dashboard. Once you are on the Project Dashboard, select the Field Order in the processes area:



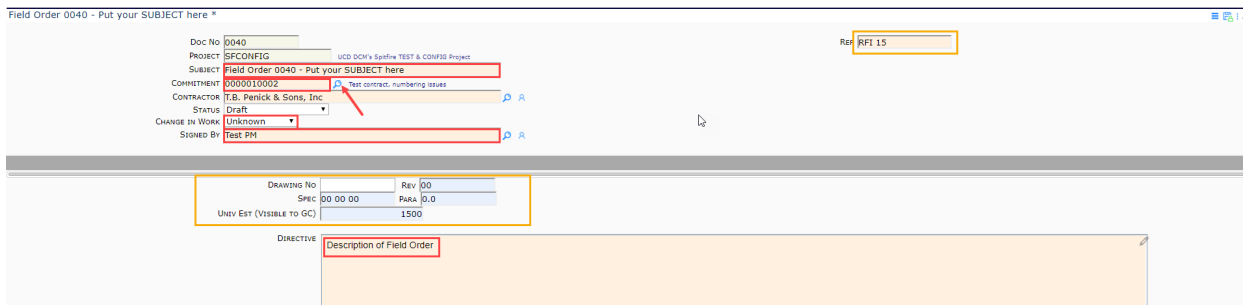
To create a new Field Order click on the + icon





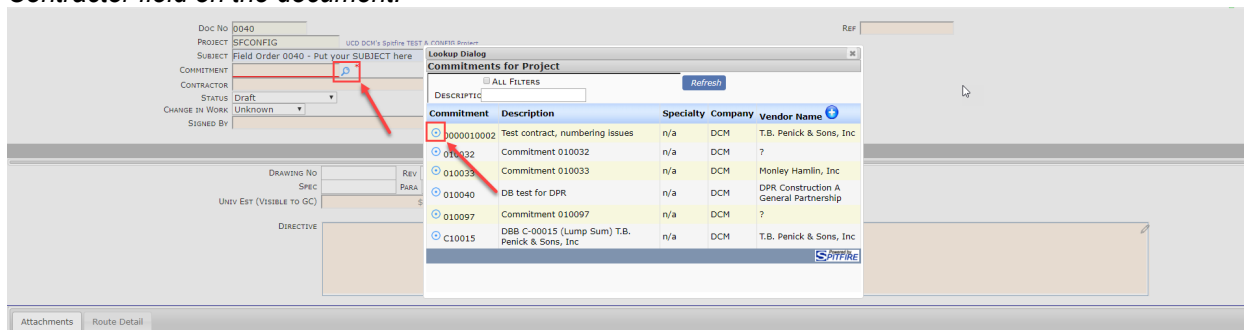
Once you click the + icon, you will see a new document open up on your screen:



Fill in all of the fields in the document highlighted below in red – these are mandatory fields. The fields highlighted in yellow are optional. Start with subject, then choose your commitment (**see instructions on choosing commitment in 2<sup>nd</sup> screenshot below**), select Change in Work, fill in Draw No, Rev, Spec, Para, University Est and write your Directive. Once you have finished filling out the document, fill in your name in the Signed By field. **Please note: The REF field can be used to reference an associated RFI, etc. (ex: RFI 15).**

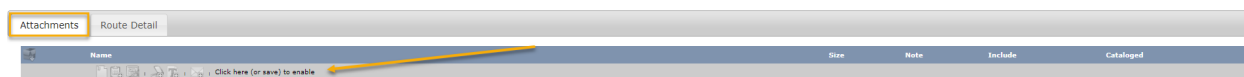


To select the commitment on your document, click the  icon, a selection window will pop up, click the  next to the commitment to select it. **Please note:** when you select your commitment it will autofill the Contractor field on the document.

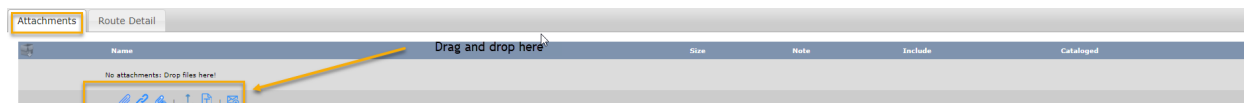


### Add Attachments

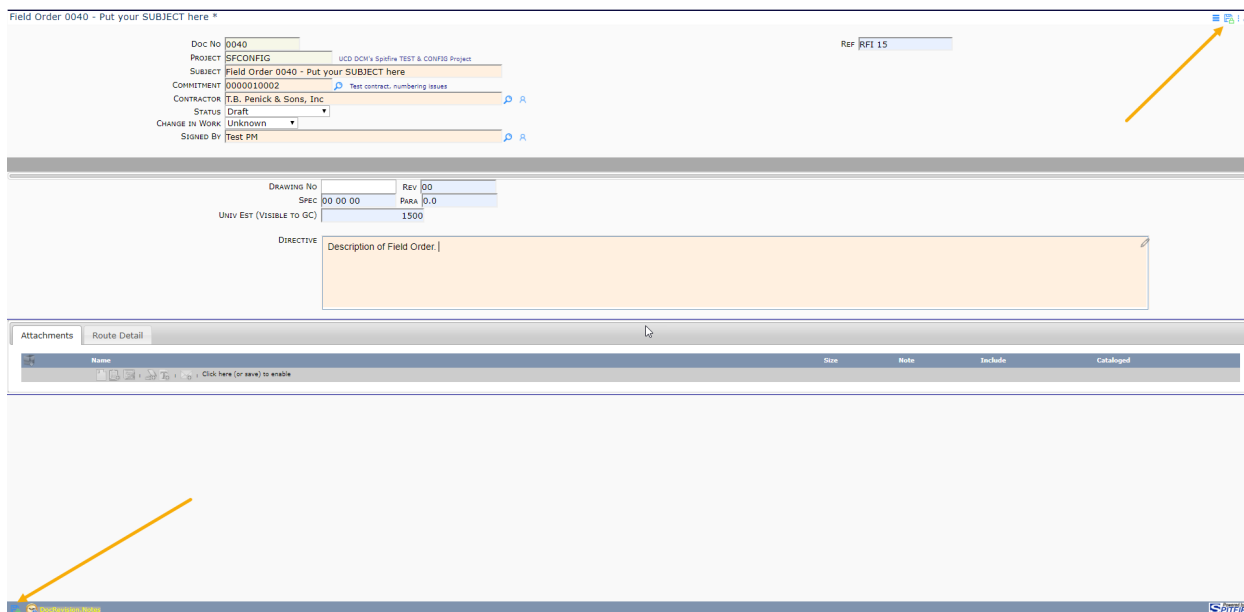
Once you have filled out the document, you may also add Field Order associated attachments. To do this, select the attachments tab at the bottom of the document and drag your file to the task bar as noted below. **Please note:** If you have not already saved the document, you will need to or click on **'Click here (or save) to enable'** on the attachments tab:




Once the icons are enabled, just drag and drop your file to add:



Once you have added your attachment. Click the  icon at the top or bottom of the page to save the document.



## Routing

To route the document, head to the Route Detail Tab, make sure you are in sequence 1, and click the icon, this will automatically change the status to Issued and then distribute the Field Order. 

Field Order 0040 - Put your SUBJECT here (saved)

Doc No: 0040      REF: RFI 15

PROJECT: SFCONFIG      UCD DCI's Softwa TEST & CONFIS Project

SUBJECT: Field Order 0040 - Put your SUBJECT here

COMMITMENT: 0000010002      Test contract numbering issues

CONTRACTOR: T.B. Panick & Sons, Inc.

STATUS: Draft

CHANGE IN WORK: Unknown

SIGNED BY: Test PM

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DRAWING No:      REV: 00

SPEC: 00 00 00      PARA: 0.0

UNIV EST (VISIBLE TO GC): 1500.00

DIRECTIVE: Description of Field Order.

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Attachments      **Route Detail**

Seq	Item	Status	Iss	Rep	Notes	Date
1	Test PM (AE-T-PrjgMan) UC Davis - DCI (Project Manager)	Pending				Date: 10/11/2019 10:00 AM Viewed: minutes ago
99	Spofire UC Davis - DCI (Project Manager)	Pending				
100	Test DP (AE-T-Grunds) UC Davis - DCI (Project Manager)	CC'd				
100	Test Insp IOR (AE-T-IOR) UC Davis - DCI (Project Manager)	CC'd				
100	Test PC UC Davis - DCI (Project Manager)	CC'd				
100	Test PM (AE-T-PrjgMan) UC Davis - DCI (Project Manager)	CC'd				

**Placeholder for instructions on 'How to create a COR and a CO from a closed FO.  
- Coming Soon.**

That's it.....you've completed creating and routing a Field Order!