



AASHTOWare Project SiteManager™ Training Guide for Field Staff at the Tennessee Department of Transportation

AASHTOWare Project SiteManager™ 3.14a

January 2017



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Getting Started

In this chapter, receive instruction about the following:

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Understanding the General Workflow

The following diagram shows the general contract workflow in AASHTOWare Project SiteManager™ (hereinafter referred to as “SiteManager”).

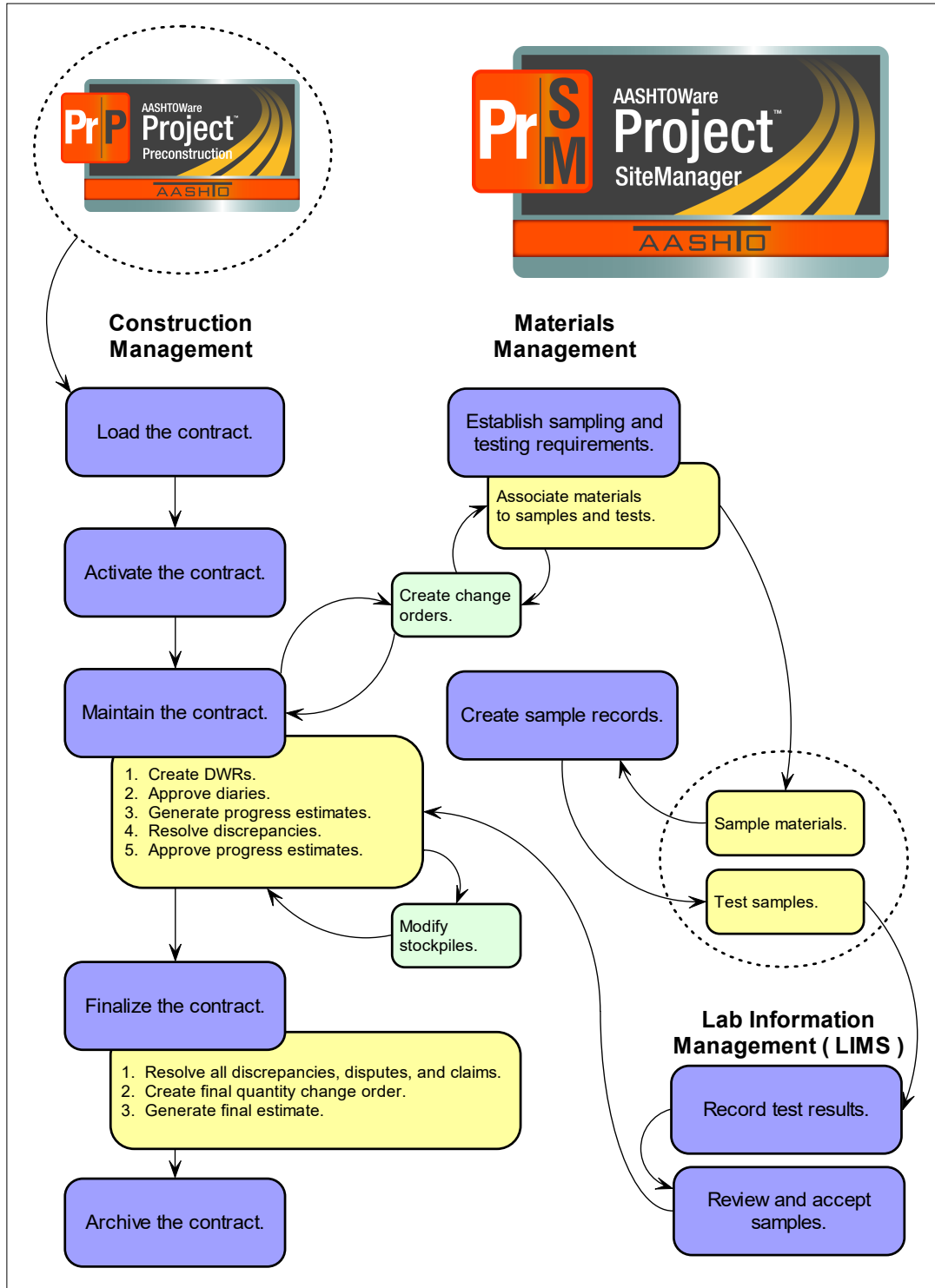


Figure 1. General Workflow

Using this Guide

This guide is divided into chapters. Each chapter may contain sections for objectives, topics, instructor-led exercises, a summary, and a review.

Objectives

Each chapter begins with the objectives both you and the instructor should try to achieve.

Topics

Each chapter contains topics corresponding to these objectives. Each topic contains a short description and figure of the SiteManager™ function being addressed.

Instructor-Led Exercises

Identify instructor-led exercises by the bulldozer icon and sequential numbering. Each instructor-led exercise is very explicit and details the specific steps to follow and data to use.



Exercise 2

Figure 2. The Bulldozer Icon and Sequential Numbering Used to Identify Instructor-Led Exercises

NOTE

FOLLOW THE EXERCISES CAREFULLY. STAY ON SCRIPT. THE EXERCISE DATA HAS BEEN CHOSEN TO SIMULATE REAL WORLD DATA.

Summary

Each section ends with a summary of the main points learned and all the SiteManager functionality covered in the chapter. Each summary is an excellent reference for the review exercise that follows. Remember to use the summary when you return to your office and begin using SiteManager on your own.

Review Exercise

Review exercises provide a means to practice the skills you acquired in the chapters. Read them carefully; the review exercises are more general than instructor-led exercises, but they still provide steps to follow and data to use. As you perform the review exercise, refer to the Summary for tips on SiteManager navigation.

Understanding SiteManager and LIMS

SiteManager is a comprehensive construction management software product that covers the complete construction, materials, and laboratory management process from contract award through contract finalization.

SiteManager software's Laboratory Information Management System component, referred to as LIMS, streamlines the current sampling and testing workflow. SiteManager integrates field-based data collection, administration of the contract records and contractor payments with material management in one enterprise-wide software package.

Accessing Support Resources

The following SiteManager documentation and support resources are available to TDOT staff.

Training Guides and Training Application

Both TDOT Operations and TDOT Materials and Tests have custom AASHTOWare Project SiteManager™ training guides to use with a custom training application for classroom or self-paced instruction.

Obtain electronic documentation and training material from the TDOT intranet. Please direct questions or requests for printed documentation to appropriate support personnel.

Generic References

Access the online help reference from SiteManager software's Help menu.

Note: Remember that the *User Reference Manual* and *Help* are not agency-specific and do not contain information about agency customizations.

Starting SiteManager

You may start SiteManager the same way you would any program on your computer, but for this exercise you will learn the most common.



Figure 3. Desktop Icon



Exercise 1

In this exercise, learn how to start SiteManager.

1. Double-click the **SiteManager Training** desktop icon. The SiteManager Logon window appears.

You've started SiteManager.

Logging On and Changing Your Password

In addition to a user ID, SiteManager also has password protection.

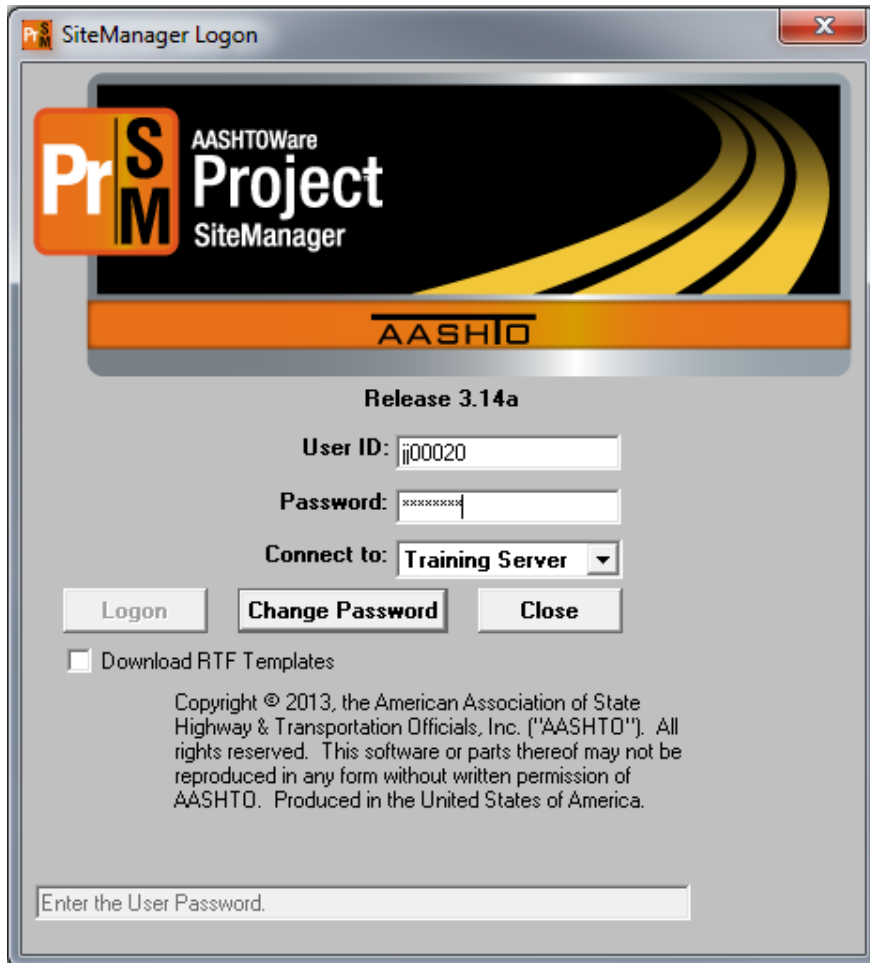


Figure 4. SiteManager Logon Window

Usage: TDOT does not use reports in standalone mode that require RTF templates; therefore, do not select the Download RTF Templates check box.

Understanding User IDs

When you make changes to the records in the system, the system records your user ID along with the change.

Understanding Passwords

When you log on to SiteManager for the first time, the default password will be PASSWORD (all uppercase characters).

SiteManager passwords are case-sensitive; they can be all capitals, all lowercase, or a combination, but you must type them the same way each time you log on to SiteManager. Passwords are eight characters long and may contain any combination of letters and numbers. (The training software does not employ this constraint.)

Remember these important tips regarding your SiteManager password:

- If you have attempted to log on twice and have failed, close the SiteManager Logon window and start again. This will allow you to try to log on again without disabling your password.
- If you attempt to log on three times and fail, SiteManager will disable your password.

Changing Passwords

To change your password, on the SiteManager Logon window, click the Change Password button and complete the requested fields.



Figure 5. Change Password Window

Understanding Security Groups

For users with access to more than one security group, select the appropriate security group after using the SiteManager Logon window.

A user ID assigned to a security group determines the functions and data to which that user has access and whether that access has update or inquiry privileges. Most users belong to only one security group, but on occasion, a user may need access to more than one group.

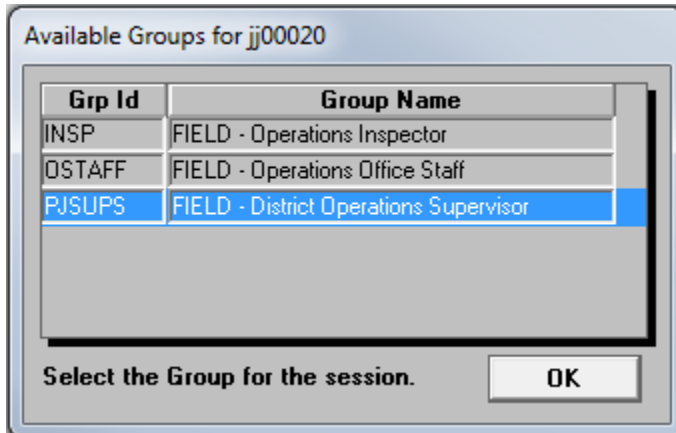


Figure 6. Available Groups For < > Window

Depending on your SiteManager security privileges, users may have:

- Update rights to all SiteManager windows and data
- Inquiry rights only and be able to access data and print reports, but not update information
- Update rights on some SiteManager windows, inquiry only on other windows, and/or no access to other windows
- Update rights on some SiteManager data, inquiry rights on other data, and/or no access to other data
- Access to SiteManager in only a network mode
- Access to SiteManager in both standalone and network mode

Categories

Contract ID: TRN349 PCN: 67004-3213-14

Category Number	Description	Work Class Type
0100	ROADWAY	Spaces
0300	BOX BRIDGE	Spaces
0500	BRIDGE	Spaces
1110	EROSION CTRL. ALTERNATE 'B'	Spaces

Catg Nbr: 0100 Fed St/Pr Proj Nbr: STP-84(9)

Desc: ROADWAY

Catg Wrk Cls Type: Spaces

Fed Wrk Catg Type: Spaces

Fed Wrk Cls Type: ROADWAY

Suppl Wrk Cls Type: Spaces

Beg Sta Nbr:

End Sta Nbr:

Bridge ID:

Brdg Type: Spaces

Brdg Span Nbr:

Brdg Length: .0000

Brdg Width: .0000

Beg Termini:

End Termini:

Length: .0000

Width: .0000

Engr Pct: .00

Rd Sect Nbr:

Hwy Nbr:

Hwy Type: Spaces

Unit Nbr: 000

Desc:

Figure 7. Example of a Window in Inquiry-Only Mode

When users have access to both the window and the data, the field appears with a white background. When users only have inquiry access, the data appear but the fields have a gray background.



Exercise 2

In this exercise, learn how to change a default password, select a security group and log on to SiteManager for the first time.

User ID	jj00020	Password	PASSWORD
Connection	Training Server		
Group Name	FIELD - District Operations Supervisor [PJSUPS]		

1. In the SiteManager Logon dialog box, click in the **User ID** field and type **jj00020**.
2. In the **Password** field, type **PASSWORD**.
3. Click the **Change Password** button. SiteManager displays the Change Password dialog box.
4. In the **Old Password** field, type **PASSWORD**.
5. In the **New Password** field, type **pass**.
6. In the **Confirm Password** field, type **pass**.
7. Click the **OK** button. The system displays the Available Groups for < user ID > window because this user belongs to more than one security group.
8. In the **Group Name** column, double-click **FIELD - District Operations Supervisor**. The system displays the Main Panel panel.

You've now changed the default password, selected a security group and logged on to SiteManager.

Protecting Passwords

Do not let anybody know your password. SiteManager maintains a record of everything you do in SiteManager. These records are the same as your signature (electronic signature).

Electronic Signature Law: Millennium Digital Commerce Act of 2000, digital technology is legally binding, 6-30-00, signed by Clinton. If a statute, regulation, or other rule of law requires documentation in original form, an electronic record satisfies the rule.

IMPORTANT TIPS REGARDING YOUR USER ID:

1. WHEN A USER ID IS FIRST ASSIGNED TO A USER, THE DEFAULT PASSWORD IS "PASSWORD" (ALL CAPS). THE USER MUST CHANGE THE PASSWORD BEFORE LOGGING ON TO SITEMANAGER.
2. SITEMANAGER USER IDS FOR TDOT CRITERIA:
 - SEVEN CHARACTERS IN LENGTH.
 - THE FIRST TWO CHARACTERS WILL BE JJ (IN LOWERCASE), FOLLOWED BY A RANDOMLY ASSIGNED 5-DIGIT NUMBER.

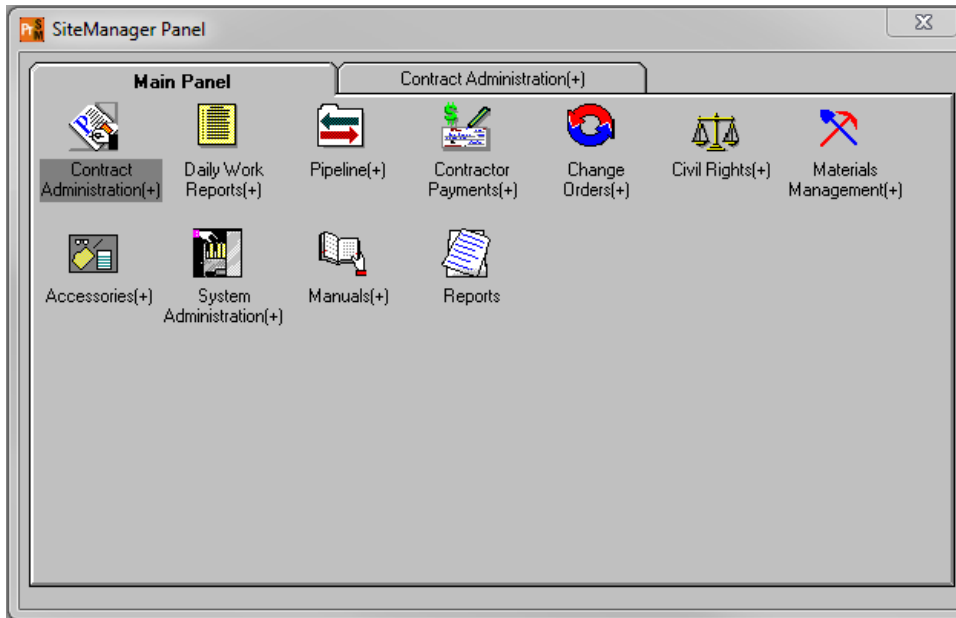
IMPORTANT TIPS REGARDING YOUR SITEMANAGER PASSWORD AND LOGON ATTEMPTS:

1. IT IS IMPORTANT THAT YOU DO NOT GIVE OUT YOUR PASSWORD TO ANYONE. SITEMANAGER MAINTAINS A RECORD OF EVERYTHING YOU DO IN SITEMANAGER. THESE RECORDS ARE THE SAME AS YOUR SIGNATURE.
2. IF YOU HAVE ATTEMPTED TO LOG ON TWICE AND HAVE FAILED, CLOSE THE SITEMANAGER LOGON WINDOW AND START AGAIN. THIS WILL ALLOW YOU TO TRY TO LOG ON AGAIN WITHOUT DISABLING YOUR PASSWORD.
3. IF YOU ATTEMPT TO LOG ON THREE TIMES AND FAIL, SITEMANAGER WILL DISABLE YOUR PASSWORD. CONTACT REGIONAL SUPPORT IF PASSWORD IS DISABLED.
4. SITEMANAGER PASSWORDS FOR TDOT CRITERIA:
 - FOUR TO EIGHT CHARACTERS IN LENGTH
 - CASE-SENSITIVE - SITEMANAGER CAN TELL THE DIFFERENCE BETWEEN CAPITAL AND LOWERCASE LETTERS. TYPE YOUR ID AND PASSWORD PRECISELY.
 - 90-DAY EXPIRATION
 - CANNOT BE THE WORD "PASSWORD"
 - CANNOT CONTAIN SYMBOLS.

EVERYTHING IS TRACKED BY ID! IN A COURT OF LAW, GREAT IMPORTANCE IS PLACED ON SHOWING AN UNBROKEN CHAIN OF CUSTODY.

Understanding the Main Functions of SiteManager

After starting SiteManager, the SiteManager Panel displays the Main Panel with the main functions of the system as icons. The central functionality of SiteManager is divided into areas represented by icons on the Main Panel.



NOTE
AVAILABLE ICONS ARE
SPECIFIC TO THE
SECURITY GROUP.

Figure 8. SiteManager Panel Window - Main Panel

Navigating with the SiteManager Panel

Use the SiteManager Panel window to navigate to the different areas of SiteManager. Start with the Main Panel that contains the highest level of the different functional groups of SiteManager. Each icon represents a functional group. Double-click an icon to open another panel containing the sub-groups or the actual windows for that function.

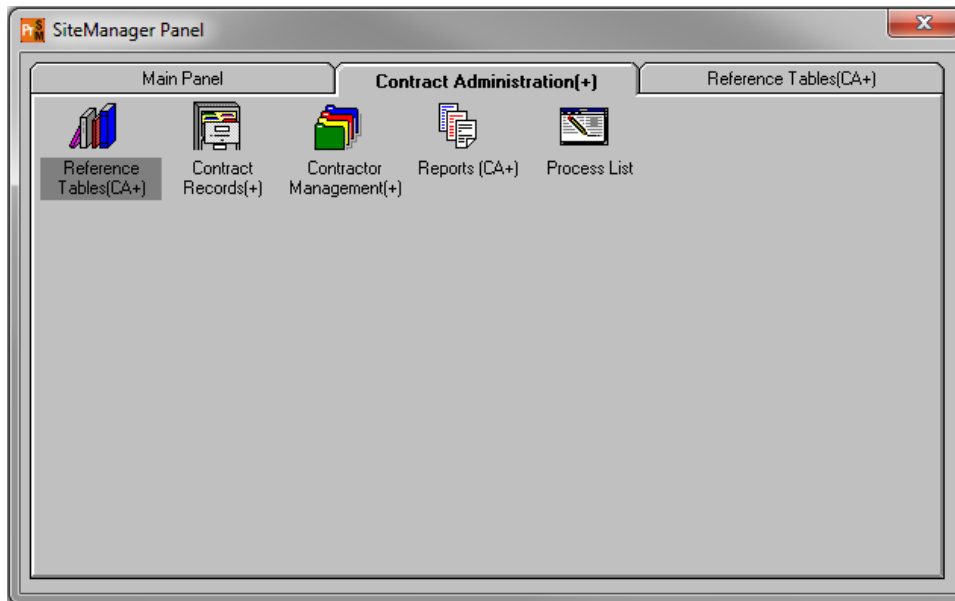


Figure 9. Navigating in SiteManager

NOTE

IF STUDENTS GET LOST WHILE NAVIGATING, SUGGEST STARTING FROM MAIN PANEL.

Note: The plus sign (+) next to an icon means that double-clicking the icon will open another panel, not a window.

The steps to access a SiteManager window or record vary depending on whether you have just entered the system or have been in another window and have already selected a record.

For instance, if you enter the application and navigate directly to the Contractor Payments component, the Estimate Summary window requires the selection of the desired contract and estimate. However, if you have been working in the Contract Records component, already have a contract selected, and then navigate to the Contractor Payments component, the Estimate Summary window displays the estimates for the contract previously selected in Contract Records.

The Summary section of each chapter provides steps to access components of SiteManager as if you just entered the application.

TDOT CONTRACT NUMBER NAMING CONVENTION

FORMAT: CN<Y><###>

IN PRODUCTION, EACH CONTRACT BEGINS WITH 'CN' AS REQUIRED FOR FINANCE SYSTEM. IN TRAINING, THE 'CN' IS REPLACED WITH 'TR'.

Y - LETTING YEAR, WHERE

2002=A

2013=M

2014=N

2015=P

NOTE: THE LETTERS 'I' AND 'O' WERE INITIALLY SKIPPED TO ELIMINATE ANY CONFUSION BETWEEN ALPHA AND NUMERIC CHARACTERS.

- SEQUENTIAL NUMBER THAT STARTS OVER EACH LETTING YEAR

EXAMPLE: TRN349 = CONTRACT 349 FROM 2014 LETTING.

TRAINING CONTRACTS REPRESENT "SNAPSHOTS" OF A REAL CONTRACT IN VARIOUS STAGES OF THE LIFECYCLE.



Exercise 3

In this exercise, browse through SiteManager panels and open a window.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**

1. On the **Main Panel** panel, double-click the **Contract Administration** icon. The system displays a second-level panel.
2. Double-click the **Contractor Management** icon. The system displays a third-level panel. View the icons available from the **Contractor Management** panel.
3. To go up two levels, click the **Main Panel** tab.
4. Double-click the **Daily Work Reports** icon. View the icons available.
5. To go up a level, click the **Main Panel** tab.
6. Double-click the **Contractor Payments** icon. View the icons available.
7. To go down a level to view the icons available from the **Estimate** panel, double-click the **Estimate** icon.

NOTE
EXPLAIN UP AND DOWN
CONCEPT, POSSIBLY AS
TIERS.

NOTE
IF ADDITIONAL PANELS
PERTAIN TO THE CLASS,
OPEN THOSE NOT
COVERED IN THIS
EXERCISE.

Open a window from the Contract Records panel.

8. To go up two levels, click the **Main Panel** tab.
9. Double-click the **Contract Administration** icon. View the icons available.
10. Double-click the **Contract Records** icon. View the icons available.
11. Double-click the **Contracts** icon. SiteManager displays the Select Contract window.
12. In the Select Contract window, double-click **TRN349**. SiteManager displays the Contracts window.

You've navigated SiteManager's panels and opened a window.

Understanding the SiteManager Toolbar

Many of the functions available from the menus are also conveniently available from the SiteManager toolbar.



Figure 10. The SiteManager Toolbar
(Available while the Contracts window is open)



Exercise 4

In this exercise, identify the buttons on the toolbar.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**

1. Place your cursor over a button on the toolbar. SiteManager displays the name of the button.
2. Move your cursor to another button.
3. Repeat Steps 1 and 2 until you have reviewed all the buttons on the toolbar.
4. Click the **SiteManager Panel** button. The system displays the SiteManager Panel.

Tip! If more than one window must be opened at once, click this button to return to the SiteManager Panel window.

5. On the SiteManager Panel window, click **Close**.

You've identified the toolbar buttons and opened the SiteManager Panel window.

Tip! If you right-click on the SiteManager toolbar, SiteManager displays a menu with options to adjust how SiteManager displays the toolbar and its buttons. Use the Show Text option to display both larger toolbar buttons and their names.

Note: Some icons change. For example, the Remarks button displays lines of text after adding a remark and the Attachments button displays a paper clip after attaching a file.

NOTE

THE TOOLBAR BUTTONS ALSO HAVE CORRESPONDING MENU OPTIONS.

DIFFERENT BUTTONS ARE AVAILABLE IN DIFFERENT WINDOWS.

ICONS ARE GRAYED OUT WHEN THEY ARE NOT AVAILABLE TO SELECT.

Reading the SiteManager Status Bar

The SiteManager Status Bar at the bottom of the SiteManager window indicates your status, connection, database region, logon group ID and user ID.



Figure 11. SiteManager Status Bar

NOTE

NOTICE HOW THE STATUS BAR WILL LOOK IN PRODUCTION COMPARED TO THE TRAINING ENVIRONMENT.

Understanding SiteManager Menus

Access SiteManager menus with the mouse or the keyboard. You can also access many SiteManager menu choices using keystroke shortcuts.

The following guidelines apply to SiteManager menus:

- Menu choices followed by an arrow (▶) lead to cascading submenus.
- Most of the lowest-level menu choices include keystroke shortcuts and display windows when selected.
- All menu names and most menu choices include keystroke accelerators denoted by underlined letters. To display the underlined letters, press the **ALT** key. To open a menu or a menu choice when you see a keystroke accelerator, type the corresponding letter.

NOTE

SERVICES | ATTACHMENTS IS AN EXAMPLE OF A CASCADING SUBMENU.

CLICK FILE MENU TO SHOW A FEW SHORTCUTS.

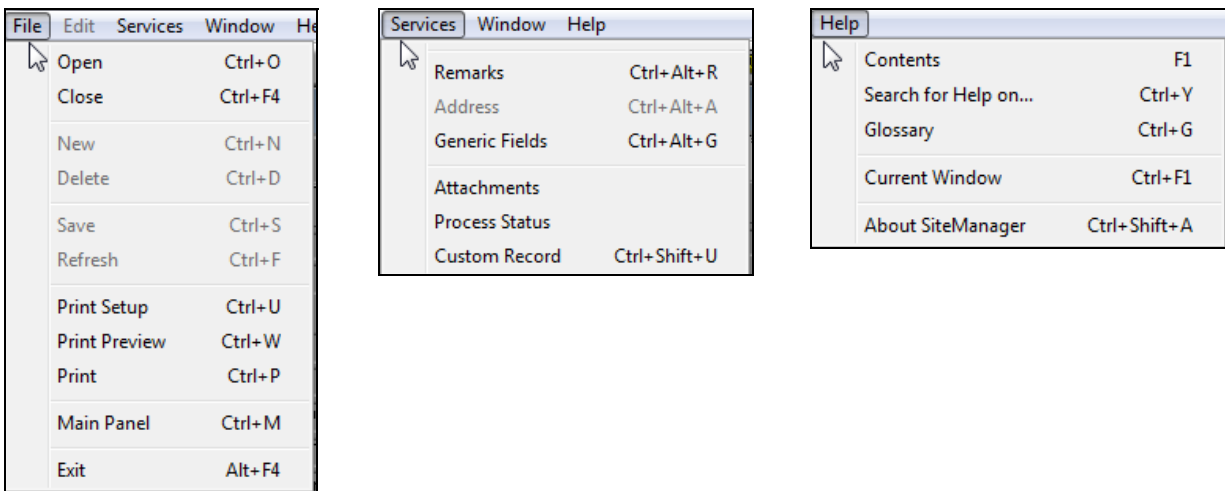


Figure 12. SiteManager Menus - File, Services and Help



Exercise 5

In this exercise, explore the File, Services and Help menus.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**

Explore the Services menu.

1. Click the **Services** menu.
2. Note the choices available from the **Services** menu.
3. To close the menu, click the **Services** menu again.

THE SERVICES MENU
CHOICES CHANGE BASED
ON THE CONTEXT OF THE
WINDOW.

Explore the Help menu.

4. Click the **Help** menu.
5. Note the choices available from the **Help** menu.
6. Click the **Current Window** choice. The system displays the Help entry for the current window in the SiteManager Online Help window.
7. If desired, scroll through the entry.
8. On the SiteManager Online Help window, click **Close**.

HELP IS FOR GENERIC
SOFTWARE. REFER TO THE
PROCEDURE DOCUMENTS
FOR FIELD DEFINITIONS.

Explore the File menu.

9. Click the **File** menu.
10. Note the choices available from the **File** menu.
11. Click the **Main Panel** choice.

Tip! If the SiteManager Panel window is accidentally closed, click the Main Panel choice to display it again.

12. To close the menu, click the **File** menu again.

You've viewed the choices available on the File, Services and Help menus.

Tip! Think of the Services menu as a catch-all menu for miscellaneous functions relevant to the active window.

Opening Multiple SiteManager Windows

In many instances, while working in a SiteManager window users may need to open another window without closing the current one. Use the SiteManager Panel to browse to and open another window. Having opened more than one window of SiteManager, users can then control how the windows display.

Controlling the Display of Multiple Windows

Having opened more than one SiteManager window, you may now use a variety of methods to control the display of the SiteManager windows and your movement between them.

Note: For more specific instruction, refer to the Review section at the end of this chapter.

Using Tile

To divide the screen into the number of SiteManager windows that you have active, use the Window menu's Tile feature. Typically, you will use Tile to display two SiteManager windows side-by-side vertically to compare the entries in each.

Note: Do not use Tile when more than two SiteManager windows are active since you will not be able to see enough of each SiteManager window to make it worthwhile. With three windows active, tiling will give each window only one third of the screen.

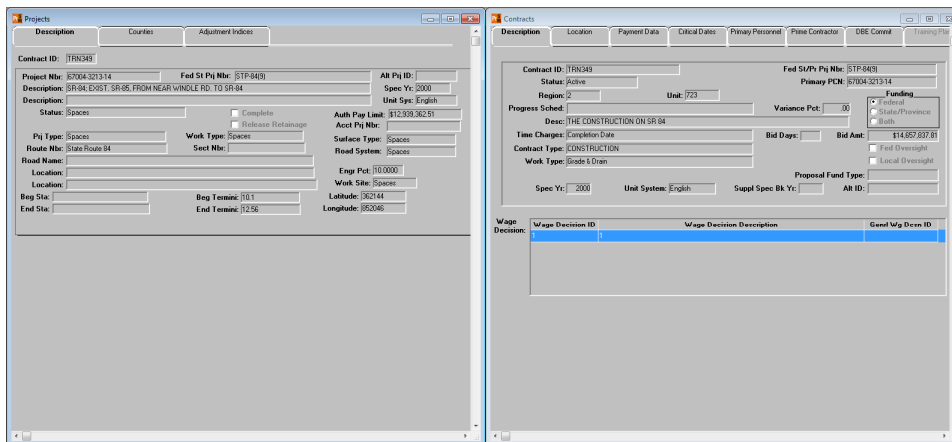


Figure 13. Two Windows Tiled



Exercise 6

In this exercise, learn to open a second window and use tile.

User ID	jj00020	Password	pass
Connection	Training Server		
Group Name	FIELD - District Operations Supervisor [PJSUPS]		

1. On the toolbar, click the **SiteManager Panel** button. SiteManager displays the SiteManager Panel.
2. On the **Contract Records** panel, double-click the **Projects** icon.
3. In the **Project Number** area, in the **PCN** column, scroll to and double-click **67004-3213-14**. SiteManager displays the Projects window.
4. On the **Window** menu, select the **Tile** choice. SiteManager displays both open windows side-by-side.

You've tiled open windows.

Using Cascade

To make each of your active SiteManager windows an equal size and arrange the windows in an overlapping offset manner, use the Window menu's Cascade feature. Typically, you will use Cascade to display more than two open SiteManager windows. When you need to navigate between more than two windows, click the accessible portion of the appropriate window to bring it forward and make it active.

Using Layer

To display the active SiteManager window in a full screen display, use the Window menu's Layer feature. Typically, you will use Layer to give each active window a full display or to return a single active window to full display after closing other windows.

Closing Versus Exiting

SiteManager follows the same principles of closing a window versus exiting the application as other applications on a Microsoft® Windows® operating system. When you are in a SiteManager window and you wish to end your work in it, but continue to work in SiteManager, you should close the window. As with other applications, you only exit when you complete your work and want to log off the application.

Closing

Close a window in the following ways:

- Click the Close button on the toolbar.
- Select the Close choice on the File menu.
- Click the Close button on the right side of the window's title bar.

Exiting

Exit an application in the following ways:

- In SiteManager, click the Exit SiteManager button on the toolbar. In SiteManager LIMS, click the Exit SiteManager LIMS button on the toolbar, then at the prompt, click the Yes button to confirm your decision.
- In SiteManager, select the Exit choice on the File menu. In SiteManager LIMS, select the Exit Application choice on the File menu, then at the prompt, click the Yes button to confirm your decision.
- In both SiteManager and SiteManager LIMS, click the Exit button on the right side of the application's title bar.



Exercise 7

In this exercise, learn to close a window and exit SiteManager.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**

1. On the toolbar, click the **Close** button. SiteManager closes the active window.
2. On the **File** menu, select the **Exit** choice.

You've closed a window and exited the application.

Summary

To start SiteManager:

1. On your desktop, double-click the SiteManager desktop icon.

To log on to SiteManager:

1. Start SiteManager.
2. On the SiteManager Logon window, in the **User ID** field, type your user ID.
3. Press the **Tab** key.
4. In the **Password** field, type your password.
5. Click **OK**.

To change your password:

1. Start SiteManager.
2. On the SiteManager Logon window, type your user ID and your current password.
3. Click Change Password.
4. In the **Old Password** field, type your current password.
5. Press the **Tab** key.
6. In the **New Password** field, type your new password.
7. Press the **Tab** key.
8. In the **Confirm Password** field, type your new password, again.
9. Click **OK**.

To change security groups:

1. Using a user ID that belongs to multiple security groups, log on to SiteManager.
2. In the Available Groups list box, select a security group.
3. Click the OK button.

To open a window:

1. On the SiteManager Panel, double-click the desired window's icon.

To navigate up or down a level in the SiteManager Panel:

1. Click the desired level's tab.

To open the SiteManager Panel:

1. On the toolbar, click the **SiteManager Panel** button.

or

1. Click the **File** menu.
2. Click the **Main Panel** choice.

To open more than one window:

1. Open a window of SiteManager.
2. Open the SiteManager Panel.
3. Open another window of SiteManager.

To tile windows:

1. Open the number of windows that you want to tile.
2. Click the **Window** menu.
3. Click the **Tile** choice.

To cascade windows:

1. Open the number of windows that you want to cascade.
2. Click the **Window** menu.
3. Click the **Cascade** choice.

To navigate between cascaded windows:

1. Click the visible portion of the window you want to view.

To layer windows:

1. Open the number of windows that you want to layer.
2. Click the **Window** menu.
3. Click the **Layer** choice.

To navigate between layered windows:

1. Click the **Window** menu.
2. From the list, click the name of the window you want to view.

To close a window:

1. On the toolbar, click the **Close** button.

or

1. Click the **File** menu.
2. Click the **Close** choice.

or

1. On the window's title bar, click the **Close** button.

To exit SiteManager:

1. On the toolbar, click the **Exit SiteManager** button.

or

1. Click the **File** menu.
2. Click the **Exit** choice.

or

1. On the application's title bar, click the **Exit** button.

To exit SiteManager LIMS:

1. On the toolbar, click the **Exit SiteManager LIMS** button.
2. At the prompt, click **Yes**.

or

1. Click the **File** menu.
2. Click the **Exit Application** choice.
3. At the prompt, click **Yes**.

or

1. On the application's title bar, click the **Exit** button.

Common Functionality

In this chapter, receive instruction about the following:

- Understanding New and Existing Records 2
- Searching, Filtering, and Sorting 7
- Reporting from SiteManager 17
- System Attachments 20
- Summary 26

Understanding New and Existing Records

Users with proper authority and update rights can do the following when first accessing a SiteManager window:

- Open an existing record
- Create a new record using the current keys
- Create a new record by choosing keys

Understanding Keys

Keys are the ‘key’ pieces of information or preconditions needed to identify a record accurately, whether new or existing. Keys may include information such as contract ID, project number and so on.

Opening Existing Records

Existing records are records that you or another user already created and saved.



Exercise 1

In this exercise, learn how to open an existing record.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD – Operations Office Staff [OSTAFF]**

1. Start and log onto SiteManager as user **jj00020** *while connected in server mode*. The system displays the Available Groups window.

Select the proper security group.

2. In the **Group Name** column, double-click **FIELD – Operations Office Staff**.

Open the Daily Work Reports window.

3. On the **Main Panel** panel, double-click the **Daily Work Reports** icon.
4. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
5. Is this inquiry or update access? _____
6. Which contract ID is displayed? _____

EXAMPLES INCLUDE:

- SAMPLE RECORDS CREATED BY FIELD – M&T INSPECTORS OR HQ – DOCK
- TEST RECORDS CREATED BY LAB TECHNICIANS
- DAILY WORK REPORTS CREATED BY FIELD – OPERATIONS INSPECTORS

Open an existing record.

7. On the toolbar, click the **Open** button.
8. In the **Contract** area, in the **Contract ID** column, scroll to and double-click **TRN349**.
9. In the **Inspector** area, in the **User ID** column, scroll to and double-click **jj00001**.
10. In the **Date** area, in the **DWR Date** column, scroll to and double-click **09/24/14**. The system displays a message with information that the DWR will be read-only.
11. In the message, click **OK**.
12. When you want to open an existing record, do you use Open, New, or Choose Keys? _____

You've opened an existing record.

Note: DWRs are read-only when authorized and for every user except the creator when un-authorized.

Creating New Records with Current Keys

When accessing some windows for the first time, a new blank record will be open by default. For other windows, users must click the New button to create a new record.

Note: When the system retains part of a key selected as part of a previous task (for example, contract ID) and does not require the user to select it again, this is called “hot navigation.”



Exercise 2

In this exercise, create a new record with the current keys (that is, for the same contract ID as the existing record).

User ID	jj00020	Password	pass
Connection	Training Server		
Group Name	FIELD – Operations Office Staff [OSTAFF]		
Prior Keys	jj00001 (inspector ID); 09/24/14 (DWR date); TRN349 (contract)		

1. On the toolbar, click the **New** button. The system is ready to create a record for the current contract.
2. What is the inspector’s name? _____
3. What is the DWR date? _____
4. What is the contract? _____

Note: SiteManager automatically associated the blank record to the contract you chose in a previous exercise.

5. When you want to create a new record for the existing contract, do you use Open, New, or Choose Keys?

You’ve created a new record with the current keys.

Creating New Records by Choosing Keys

To identify initial values for new or existing records, choose keys. In some instances, the system restricts access to windows until you choose keys.

The Choose Keys choice displays a list of key field(s) available to select. In many instances in SiteManager, users must choose keys before creating a new record. Any time users need to create a record for a contract other than the currently selected contract, choose keys.



Exercise 3

In this exercise, choose keys to specify initial values or to create a new record for a different contract than the current contract.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD – Operations Office Staff [OSTAFF]**
Prior Keys **jj00020 (inspector ID); 00/00/00 (DWR date);
TRN349 (contract)**

1. Click the **Services** menu.
2. Click the **Choose Keys** choice. SiteManager displays the Contract ID window.
3. In the **Contract ID** area, scroll to and select **TRN350**.
4. Click **OK**. The system is ready to create a record for the new contract.
5. When you want to create a new record for a different contract, do you use **Open**, **New**, or **Choose Keys**?

6. Click **Close**. The system displays a message prompting to save changes.
7. In the message, click **No**.
8. Click the **Main Panel** tab.

You've chosen keys to create a new record for a different contract.

NOTE

KEY FOR THIS EXERCISE IS THE CONTRACT.

OPEN → EXISTING RECORDS

NEW → NEW RECORD ON SAME CONTRACT (KEY)

CHOOSE KEYS → NEW RECORD ON A DIFFERENT CONTRACT (KEY)

NOTE

THE CHOOSE KEYS CHOICE IS NOT AVAILABLE UNLESS ON A NEW RECORD.

Searching, Filtering, and Sorting

The system provides many means to locate data. The most useful include the Search, Filter, Filter Search, and Sort functions available from the right-click menu and the Quick Find and Quick Sort functions available from Select windows throughout the system.

Understanding Search and Filter Search

Some fields require users to select from a list of valid choices. This type of field displays a search lens (or ‘magnifying glass’) when the mouse pointer is moved over the field. To display a subset of possible choices, type in the field, then right-click on the field and select the Filter Search choice. To see all possible choices, select the Search choice.

Understanding Sort and Filter

When on a list window, right-click on a row and select the Sort or Filter choice to refine the results. Each time you open a window, SiteManager automatically applies the default sort or filter. The current filter will stay in effect until cleared or you exit SiteManager. To remove the filter, click the Clear button.

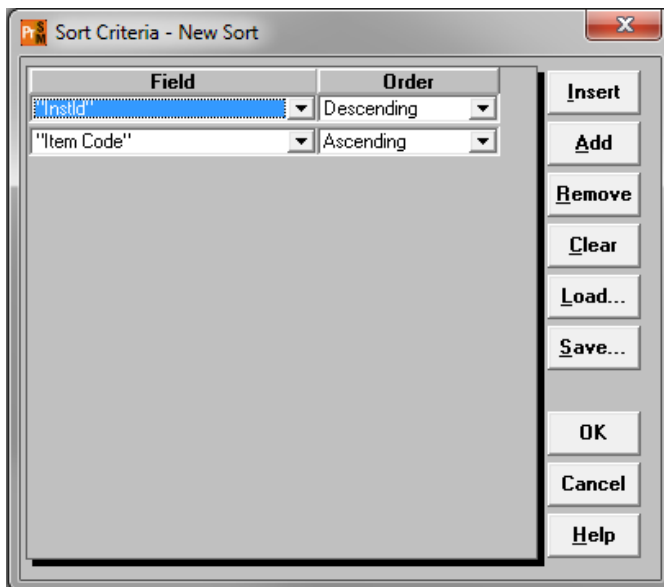


Figure 1. ‘Sort Criteria – New Sort’ Window

Understanding Criteria Window Conditions, Values and Joins

When using the **Equal (=)** condition, know the following:

- It requires the specified value to be exact.
- The system will return only matching whole words.
- Capitalization must match!

When using the **%** variable, know the following:

- The % character is a wildcard that equals “any value.”
- It works only with the Like condition.

When using the **Like** condition, know the following:

- It allows the specified value to be imprecise.
- The system assumes the use of the % character in Like conditions including all data that start with the entered value.
- Use **%value%** to return partial data matches.
- Capitalization must match!

When creating multiple conditions, know the following:

- The system executes AND joins before OR joins.
- Use AND for different fields and OR for the same field.

NOTE

UNSAVED FILTERS
REMAIN ACTIVE UNTIL
THE USER EXITS THE
SYSTEM.

FILTERS SAVED AS
DEFAULTS REMAIN ON
THE COMPUTER UNTIL
REMOVED BY THE
USER.

Sorting Records



Exercise 4

In this exercise, sort the work item records for a contract's DWR.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD – Operations Office Staff [OSTAFF]**
Prior Keys **Not applicable.**

1. On the **Main Panel**, double-click the **Daily Work Reports** icon. The system displays the **Daily Work Reports** panel.
2. Double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports window.
3. On the toolbar, click **Open**. The system prompts you to save changes.
4. In the message, click **No**.
5. In the **Contract ID** area, double-click **TRN349**.
6. In the **Inspector** area, double-click **jj00001, Bailey Morgan**.
7. In the **DWR Date** area, scroll to and double-click **09/24/14**. The system informs you that the record will be read-only.
8. In the message, click **OK**.
9. Click the **Work Items** tab.

Use the column headings to sort the list.

10. Click the **Description** column heading.
11. Click the **Item Code** column heading.

Use the sort available from the right-click menu.

12. Right-click on the first record.
13. On the menu, click **Sort**.
14. In the **Sort Criteria** window, click **Add**.
15. In the **Field** dropdown list, select the “**Instld**” choice.
16. In the **Order** dropdown list, select **Descending**.
17. Click **Add** again.
18. In the **Field** dropdown list, select the “**Item Code**” choice.
19. Click **OK**.

You've sorted the records using two different functions.

Finding Records

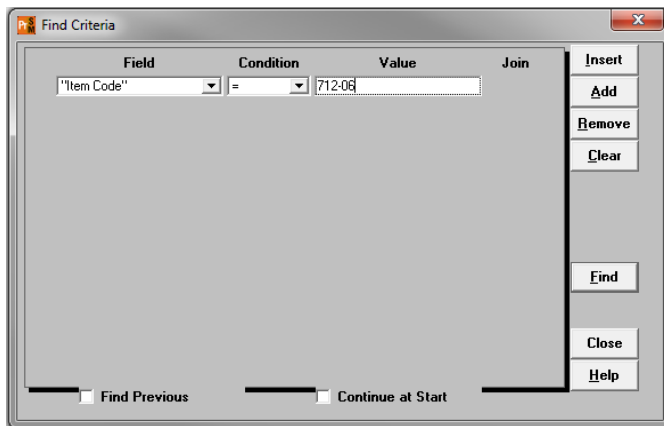


Figure 2. 'Find Criteria' Window



Exercise 5

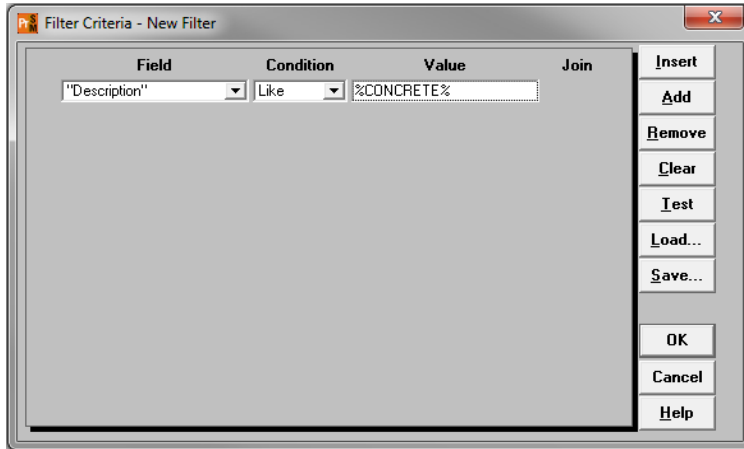
In this exercise, locate an item using the Find option.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD – Operations Office Staff [OSTAFF]**
Prior Keys **TRN349 (contract); jj00001 (inspector ID);
09/24/14 (DWR date)**

1. Right-click on the first record.
2. On the menu, click **Find**. The system displays the Find Criteria window.
3. Click **Add**.
4. In the **Field** dropdown list, select the “**Item Code**” choice.
5. In the **Condition** dropdown list, verify that the system displayed the default =.
6. In the **Value** field, type **712-06**.
7. Click **Find**. The system selects the first row that meets the criteria.

You've found the record that meets the specified conditions.

Filtering Records



WARNING! CLICK CLEAR ONLY TO REMOVE ALL ROWS ON A FILTER AND RETURN TO AN UNFILTERED LIST. CLICK REMOVE TO DELETE A SINGLE ROW.

Figure 3. 'Filter Criteria – New Filter' Window

Button	Description
Insert	Inserts blank row before the currently selected row.
Add	Inserts blank row after the last row.
Remove	Deletes selected row. Works on only one row at a time.
Clear	Deletes all rows to return to the complete unfiltered list.
Test	Displays a message with information about the number of rows this filter will return.
Load	Opens saved filter and allows for loading and deleting of saved (and default) filters.
Save	Opens Filter Name window to allow filter to be saved. The Default check box allows a filter to be automatically applied every time the window is accessed.

Figure 4. 'Filter Criteria – New Filter' Window – Buttons



Exercise 6

In this exercise, apply a filter to display only the records meeting your criteria.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD – Operations Office Staff [OSTAFF]**
Prior Keys **TRN349 (contract); jj00001 (inspector ID);
09/24/14 (DWR date)**

1. Right-click on the first record.
2. On the menu, click **Filter**. SiteManager displays the Filter Criteria window.
3. In the Filter Criteria – New Filter window, click **Add**.
4. In the **Field** dropdown list, click the “**Description**” choice.
5. In the **Condition** dropdown list, click **Like**.
6. In the **Value** field, type **%CONCRETE%**.
7. Click **OK**.
8. The system displays a message with information that this filter will return a number of rows.
9. In the message, click **OK**. The system displays the filtered results in the Work Items window.

% CHARACTERS ARE
VARIABLES.

You’ve filtered the results to display only the records that meet the specified criteria.

Clearing Filters



Exercise 7

In this exercise, clear the current filter.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD – Operations Office Staff [OSTAFF]**
Prior Keys **TRN349 (contract); jj00001 (inspector ID);
09/24/14 (DWR date)**

1. Right-click on the first record.
2. On the menu, click **Filter**. The system displays the Filter Criteria window.
3. In the Filter Criteria – New Filter window, click **Clear**. The system removes all rows from the filter.
4. Click **OK**. The system displays a message to inform that the specified filter will return a number of rows.
5. In the message, click **OK**. The system displays a message to inform you that the maximum number of rows has been exceeded and to prompt you to retrieve the results.
6. In the message, click **Yes**. The system displays the unfiltered results in the Work Items window.
7. **Close**. The system displays the SiteManager Panel window.
8. Click the **Main Panel** tab.

KNOWN ISSUE
IGNORE.
ALWAYS CLICK YES.

You've cleared the filter and returned an unfiltered list of records.

Using the Quick Sort

To locate a record quickly, sort the column in ascending order.

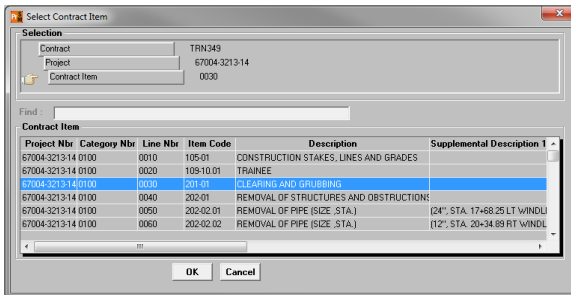


Figure 5. Select < > Window (with Quick Sort)



Exercise 8

In this exercise, apply a quick sort to locate a contract item.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD – Operations Office Staff [OSTAFF]**
Prior Keys **TRN349 (contract)**

1. On the **Main Panel** panel, double-click the **Contract Administration** icon. The system displays the Contract Administration panel.
2. Double-click the **Contract Records** icon. SiteManager displays the Contract Records panel.
3. Double-click the **Items** icon. SiteManager displays the Select Contract Item window.

Note: The previously selected contract is still active.

4. In the **Project** area, in the **PCN** column, double-click **67004-3213-14**.
5. In the **Contract Item** area, to sort by item code, click the **Item Code** column heading.
6. In the **Item Code** column, double-click **201-01** for category number **0100**. The system displays the Items window.

You've sorted the list of contract items to locate a specific item more easily.

Using the Quick Find

To jump to a record quickly, sort the column in ascending order and type the desired value in the Find field. SiteManager selects the first match.

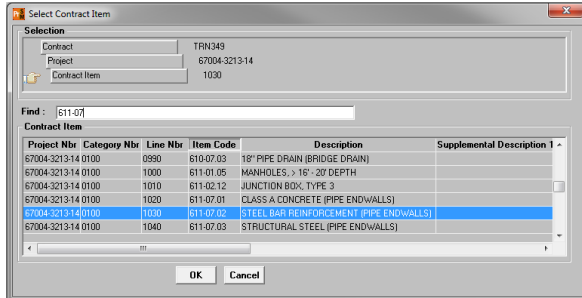


Figure 6. Select <> Window (with Quick Find)



Exercise 9

In this exercise, learn how to apply a quick find to locate contract items.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD – Operations Office Staff [OSTAFF]**
Prior Keys **TRN349 (contract)**

1. On the toolbar, click the **Open** button. SiteManager displays the Select Contract Item window.
2. To sort the column and activate the **Find** feature, click the **Item Code** column heading.
3. In the **Find** field, type **611-07**. The system selects the first item containing that string of characters.
4. Select the row for item **611-07.02**.

Important! For contracts with multiple funding categories, be sure to select the row with the correct category number and line number.

5. Click the **OK** button. SiteManager displays the Items window.
6. To close the Items window, on the toolbar, click the **Close** button.

You've used the quick find feature to quickly locate a specific contract item.

NOTE

TO MAKE THE FIND FEATURE AVAILABLE, SORT BY DESIRED COLUMN. NOTE THAT THE FIELD IS CASE-SENSITIVE.

Reporting from SiteManager

To initiate standard reports, use the associated icon from the correct report window.

LIN	Item Code	Description	Supplemental Description 1	Supplemental Description 2	Location	Unit	Unit Price	Auth Installed Qty	Installed Amount
Fed St Prj Nbr: STP-84(9)		PCN: 67004-3213-14							
Category Number: 0300									
2440	604-02.01	CLASS A CONCRETE (BOX BRIDGES)				C.Y.	\$400.00		
Qty Reported to Date: 211.00		Qty Authorized to Date: 0.00		Qty Installed to Date: 0.00					
03/24/14	Morgan, Bailey	Sta. 213+80						<input type="checkbox"/>	211.00 \$0.00
									211.00
Total for Project:									\$0.00
Total Amount for All Items:									\$0.00

Figure 7. Installed Work Report

Generating Standard System Reports

The system has several standard reports available from the following SiteManager panels:

Contract Administration

- Contract Status
- Item Quantity
- Item Work Report
- Subcontract Value
- Contractor Current Status
- Past History – Work Completion

Contractor Payments

- Installed Work
- Work Suspend/Resume Times

Change Orders

- Change Order Report
- Unapproved Change Order Aging Report
- Time Extension Granted
- Change Order/Reason Code Breakdown

Mix Design

- Aggregate Mix Design List
- Contracts for Mix Design
- Marshall Mix Design List
- Mix Design for Contract
- PCC Mix Design List
- Sample Using Mix Design
- SUPERPAVE Mix Design List

Approved Lists

- Calibrated Equipment Report
- Qualified Labs Report



Exercise 10

In this exercise, access a standard report and save a copy of the report.

User ID **jj00020** Password **pass**
Connection **Training Server**
Group Name **FIELD – Operations Office Staff [OSTAFF]**
Prior Keys **TRN349 (contract)**

1. Click the **Main Panel** tab. The system displays the Main Panel panel.
2. Double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

TIP!

SAVE A COPY OF A STANDARD REPORT THAT UPDATES IN REAL TIME. A SAVED REPORT MAY SERVE AS A REFERENCE OF THE DATA WHEN ADDRESSING QUESTIONS.

3. Double-click the **Reports** icon. The system displays the Reports panel.
4. Double-click the **Installed Work** icon. SiteManager displays the Report Criteria window.
5. In the list box, scroll to and double-click the **TRN349** choice.
6. Review the report.

CAUTION!

DO NOT CLICK THE GENERATE OFF-LINE FILE OR GENERATE OFF-LINE PRINT CHECK BOXES.

Save the report to your computer.

7. Click the **Save** button. The system displays the Save Report To window.
8. Browse to the C:\SMTRAINS directory.
9. Double-click the **SMFILES** folder.
10. In the File Name field, type INWK_TRN349_20141111.
11. Click the **Save** button. The system displays a message with information about the location of the exported file.
12. Click the **OK** button.
13. To close the Installed Work window, click the **Close** button.

View the report saved to your computer.

14. On the **Reports** panel, double-click the **View Saved Reports (PSR)** icon. The system displays the Select PSR File window.
15. Double-click the **INWK_TRN349_20141111.PSR** file. SiteManager displays the View Saved Reports (PSR) window.

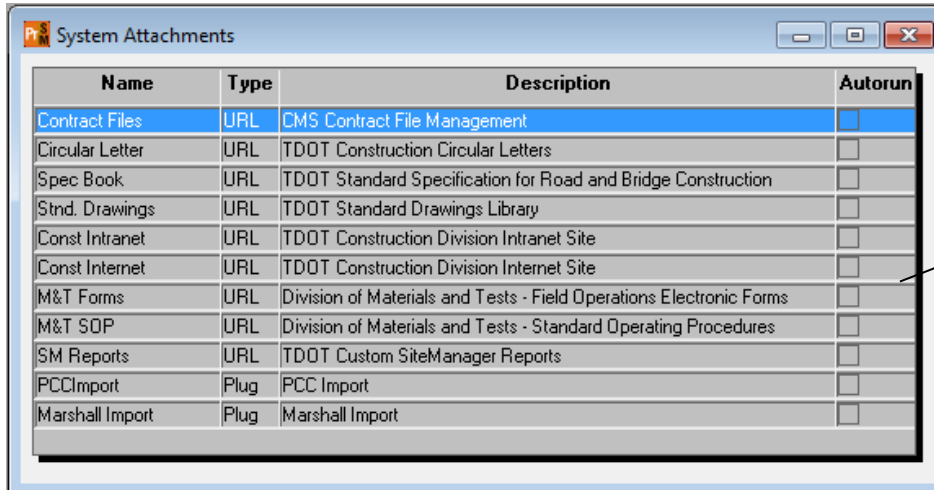
Prepare for the next exercise.

16. Click the **Close** button.
17. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've run a standard report, saved a copy, and accessed the saved report.

System Attachments

Use the System Attachments window to make web addresses (both internet and intranet), plug-ins and file attachments available from within SiteManager without attaching to specific records.



Name	Type	Description	Autorun
Contract Files	URL	CMS Contract File Management	<input type="checkbox"/>
Circular Letter	URL	TDOT Construction Circular Letters	<input type="checkbox"/>
Spec Book	URL	TDOT Standard Specification for Road and Bridge Construction	<input type="checkbox"/>
Stnd. Drawings	URL	TDOT Standard Drawings Library	<input type="checkbox"/>
Const Intranet	URL	TDOT Construction Division Intranet Site	<input type="checkbox"/>
Const Internet	URL	TDOT Construction Division Internet Site	<input type="checkbox"/>
M&T Forms	URL	Division of Materials and Tests - Field Operations Electronic Forms	<input type="checkbox"/>
M&T SOP	URL	Division of Materials and Tests - Standard Operating Procedures	<input type="checkbox"/>
SM Reports	URL	TDOT Custom SiteManager Reports	<input type="checkbox"/>
PCC Import	Plug	PCC Import	<input type="checkbox"/>
Marshall Import	Plug	Marshall Import	<input type="checkbox"/>

FOR INTERNET SITES, YOU WILL NEED TO CONNECT TO THE INTERNET TO ACCESS THEM.

Figure 8. System Attachments Window



Figure 9. CMS File Management System

URL LINKS ARE INCLUDED AS SYSTEM ATTACHMENTS.

THE CMS CONTRACT FILE MANAGEMENT ATTACHMENT WILL OPEN THE FILE MANAGEMENT SYSTEM.
THE URL THIS ATTACHMENT OPENS IS [\\JJ01SDCWA00031.NET.ADS.STATE.TN.US\CMS.](file://jj01sdcwa00031.net.ads.state.tn.us/cms/)



Exercise 11

In this exercise, view system attachments.

User ID	jj00020	Password	pass
Connection	Training Server		
Group Name	FIELD – Operations Office Staff [OSTAFF]		
Prior Keys	Not applicable.		

1. On the **Main Panel**, double-click the **Accessories** icon. The system displays the Accessories panel.
2. Double-click the **System Attachments** icon.
3. In the System Attachments window, in the **Description** column, double-click **CMS Contract File Management**.

The system attachments are not set up for the training environment.

4. **Close** the resulting browser window.
5. **Close**. The system closes the System Attachments window.
6. Click the **Main Panel** tab.
7. From the **File** menu, select **Exit**.

You've viewed a system attachment.

Generating Custom Reports

TDOT has created many custom reports to make use of the data maintained in SiteManager.

ACCESS THE CUSTOM REPORTS USING ANY OF THE FOLLOWING WAYS:

FROM THE INTRANET:

TRANSPORTAL > BUSINESS APPLICATIONS > BUSINESS OBJECTS ENTERPRISE

FROM SITEMANAGER:

MAIN PANEL > ACCESSORIES > SYSTEM ATTACHMENTS > TDOT CUSTOM SITEMANAGER REPORTS

FROM BROWSER:

[HTTP://BOE.TDOT.TN.GOV/INFOVIEWAPP/](http://BOE.TDOT.TN.GOV/INFOVIEWAPP/)



Exercise 12

In this exercise, *if the connectivity of the training room permits*, log into Business Objects Enterprise (BOE) and generate a custom report.

User ID < your jj number > Password < your NET password >
Prior Keys Not Applicable

1. Open Internet Explorer.
2. Open **transPORTAL** from <http://intranet.tdot.tn.gov/#>.

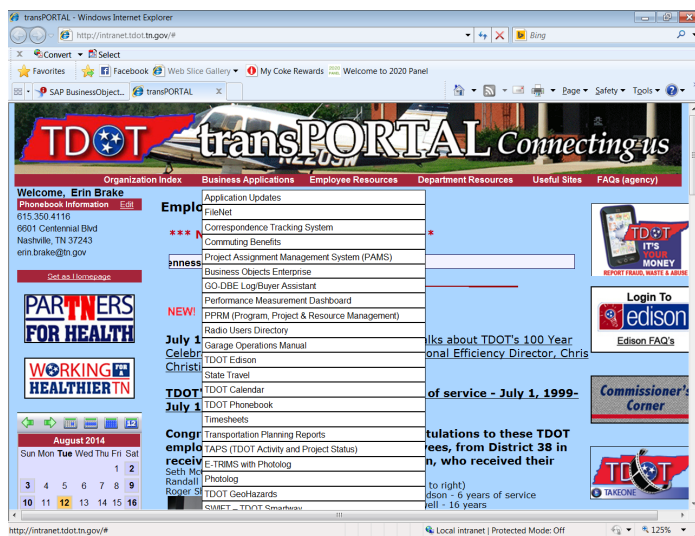


Figure 10. transPORTAL Intranet Site – Home Page

- From the **Business Applications** menu, select **Business Objects Enterprise**.

Note: This is also known as production BOE.

- Log on with **< your jj number (user ID) and password >** while connected to TDOT's network. If you provided credentials previously, the site may automatically connect. The site displays the Home page.

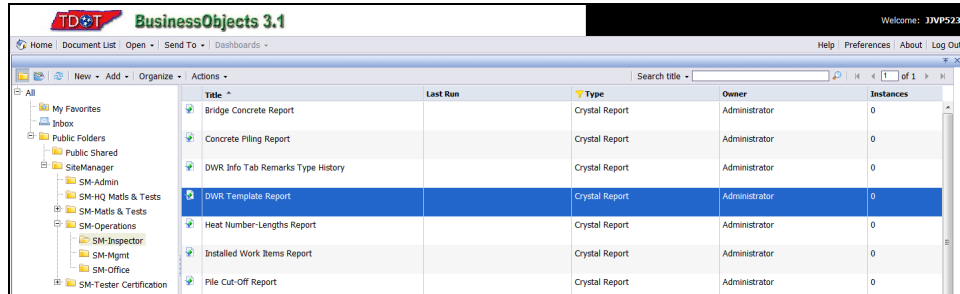


Figure 11. BusinessObjects Intranet Page (Production)

- Click the **Document List** button.

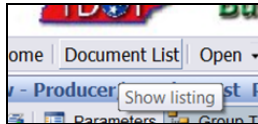


Figure 12. Document List Button (detail)

- In the left pane, click **Public Folders**. The system displays the subfolders in the right pane.
- Double-click the **SiteManager** folder.
- Double-click the **SM Operations** folder.
- Double-click the **SM-Inspector** folder.
- Double-click **DWR Template Report**. The system may display a message to inform that the document is being processed.
- When the prompt page displays, start at the top to make selections from all the required prompts and any optional prompts depending upon what you need to see in the report.

TIP!

WHEN MODIFYING PROMPTS, TO REFRESH THE REPORT, CLICK THE REFRESH REPORT BUTTON (WITH ROTATING ARROWS).

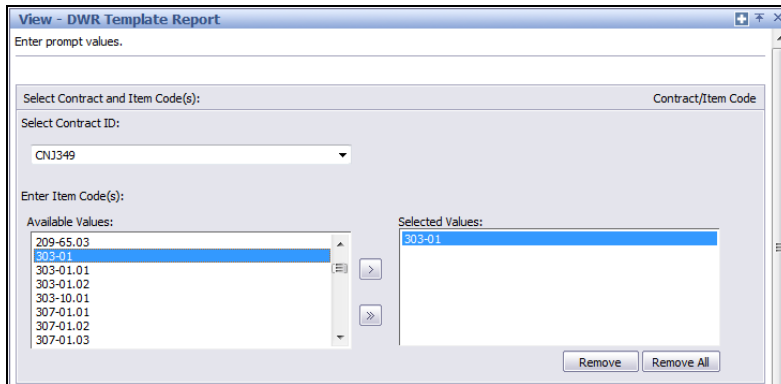


Figure 13. DWR Template Report - Prompts Page (Part 1 of 2)

- **Select Contract ID:**
Select the desired contract.
- **Enter Item Code(s):**
Select the desired items.

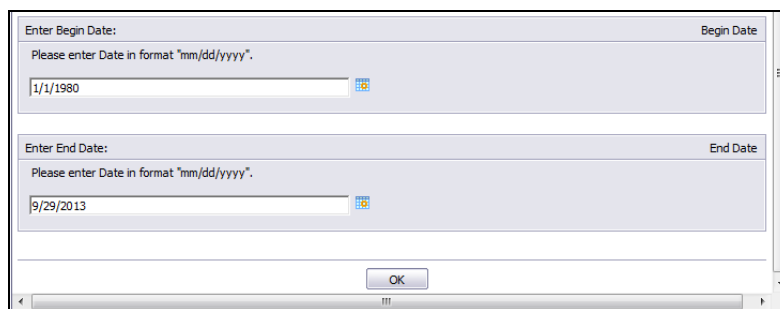


Figure 14. DWR Template Report - Prompts Page (Part 2 of 2)

- **Enter Begin Date:**
Defaults to 1/1/1980.
- **Enter End Date:**
Required.


12. Click **OK**. The system generates the report.

Export the report.

Tip! If you do not export the report, use the **Page** buttons



on the toolbar to view it in BOE, but this can be much slower.

13. In the upper left corner, click the **Export** button . The system displays the Export window.

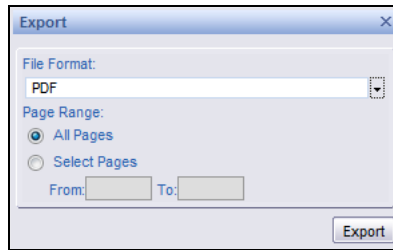


Figure 15. BusinessObjects - Export Window

14. In the File Format dropdown list, select the desired format (usually PDF).
15. Click **Export**. The system prompts to open or save the exported file.

Print Date: 11/03/2015
JJVP523

**STATE OF TENNESSEE
DEPARTMENT OF TRANSPORTATION
DWR Template Report**

Report Beginning Date: 12/27/2010 Report Ending Date: 09/29/2013

Contract: CNU349 Project Number: 67004-3213-14 Category Number: 0100

Line Item: 0630	Item Code: 303-01	Units Type: TON	Item Desc: MINERAL AGGREGATE, TYPE A BASE, GRADING D	Bid Qty: 123,731.000	Qty Reported To Date: 116,326.950	Qty Authorized To Date: 116,326.950	Qty Paid To Date: 116,391.290	Current Contract Qty: 123,731.000	Line Item Adj. To Date: 0.000	Qty Unauthorized To Date: 0.000	Qty Unpaid To Date: 0.000
-----------------	-------------------	-----------------	------------------------------------------------------	----------------------	-----------------------------------	-------------------------------------	-------------------------------	-----------------------------------	-------------------------------	---------------------------------	---------------------------

DWR Date	Loc. Seq. #	Location	From Sta	To Sta	Placed Qty	Remark	Auth	Est #	Inspector
03/02/2011	1	rt sta. 267 entrance road	+0.00	0.00	165.270		Y	0002	Hill, Kelly Robert
SM39 *									
Header									
Report Number	Ticket Bundle	Total Ticketed	Total Anti-Strip						
	Number (if applicable)	Tons/Tonn ss (Pay)	gallons/ft ss (if)						
	1	165.270							
03/16/2011	1	Maint Clone Lt Sta 24+00	+0.00	0.00	154.490		Y	0002	Hill, Kelly Robert
SM39 *									
Header									
Report Number	Ticket Bundle	Total Ticketed	Total Anti-Strip						
	Number (if applicable)	Tons/Tonn ss (Pay)	gallons/ft ss (if)						
	2	154.490							
03/22/2011	1	Maint Clone Sta 20+00 Ramp	+0.00	0.00	21.260		Y	0002	Hill, Kelly Robert
SM39 *									
Header									
Report Number	Ticket Bundle	Total Ticketed	Total Anti-Strip						
	Number (if applicable)	Tons/Tonn ss (Pay)	gallons/ft ss (if)						
	3	21.260							
03/25/2011	1	Rt Sta 17+00 Ramp B	+0.00	0.00	23.270		Y	0002	Hill, Kelly Robert
SM39 *									
Header									
Report Number	Ticket Bundle	Total Ticketed	Total Anti-Strip						
	Number (if applicable)	Tons/Tonn ss (Pay)	gallons/ft ss (if)						

1

Figure 16. Custom Report – First Page

TIP! WHEN USING DROPDOWN LISTS IN BOE THAT CONTAIN MANY CHOICES (FOR EXAMPLE, CONTRACT ID), VERY QUICKLY TYPE PART OR ALL OF THE DESIRED CHOICE IN THE DROPDOWN LIST TO JUMP TO OR SELECT THE DESIRED CHOICE. THEN, PRESS TAB ON THE KEYBOARD.

Summary

To open an existing record:

1. On the toolbar, click the **Open** button.
2. Select the appropriate keys.
3. Click the **OK** button.

To create a new record with current keys:

1. With an existing record open, on the toolbar, click the **New** button.

To create a new record with new keys:

1. With an existing record open, on the toolbar, click the **New** button.
2. On the **Services** menu, select the **Choose Keys** choice.

To perform a quick sort:

1. Click the column heading.

To sort with specified criteria:

1. Right-click on the first record.
2. On the menu, click **Sort**. The system displays the Sort Criteria window.
3. Click **Add**.
4. In the **Field** dropdown list, select the desired choice.
5. In the **Order** dropdown list, select the desired choice.

Note: Repeat the previous three steps as needed.

6. Click **OK**.

To find with specified criteria:

1. Right-click on the first record.
2. On the menu, click **Find**. The system displays the Find Criteria window.
3. Click **Add**.
4. In the **Field** dropdown list, select the desired choice.
5. In the **Condition** dropdown list, select the desired choice.
6. In the **Value** field, type the desired text.
7. Click **Find**. The system selects the first row that meets the criteria.

To perform a quick find:

1. On the column you wish to use to find a value, perform a quick sort.
2. In the **Find** field, begin typing the value you wish to find.

To search:

1. Right-click in a field.
2. On the menu, click the **Search** choice.
3. Select your choice from the list.

To filter search:

1. Type a desired value in a field.
2. Right-click in the field.
3. On the menu, click the **Filter Search** choice.
4. Select your choice from the list.

To filter:

1. Right-click on a row.
2. On the menu, click the **Filter** choice.
3. In the Filter Criteria window, click the **Add** button.
4. Select your criterion from the **Field**, **Condition**, and **Value** fields.
5. Click the **OK** button.
6. In the message, click the **OK** button.

To clear filters:

1. Right-click on a row.
2. On the menu, click the **Filter** choice.
3. Click the **Clear** button.
4. Click the **OK** button.
5. In the message, click the **OK** button.

To remove a default filter:

1. Right-click on a row.
2. On the menu, click the **Filter** choice.
3. Click the **Load** button.
4. Select the default filter.
5. Click the **Delete** button.

To print a displayed report:

1. In the **Copies** field, type the desired number of copies to print.
2. From the **File** menu, select **Print**.

To export a standard report to view outside of SiteManager:

1. Display the desired report.

Note: The system cannot export saved reports.

2. From the **Services** menu, click **Export**. The system displays the Export File To window.
3. In the **File Name** field, type the desired file name.
4. In the **Save as type** dropdown list, select the desired type of file.
5. **Save**.

To save a standard report to view later with SiteManager:

1. **Save**.
2. Change the drive and directory as desired.
3. In the **File Name** field, type the name for the file.

Note: The file has a .PSR extension.

4. **Save**. The system displays a message with information about the location of the exported file.
5. Click the **OK** button.

To open a saved standard report:

1. On the **Reports** panel, double-click the **View Saved Reports (PSR)** icon. The system displays the Select PSR File window.
2. Change the drive and directory as needed to select the desired .PSR file.
3. Click the **OK** button.

To generate a custom report from BOE:

1. Open the Internet Explorer browser.
2. Open **transPORTAL** from <http://intranet.tdot.tn.gov/#>.
3. From the Business Applications menu, select Business Objects Enterprise.

4. Log on with < **your jj number (user ID) and password** > while connected to TDOT's network. If you provided credentials previously, the site may automatically connect. The site displays the Home page.
5. Click the **Document List** button.
6. In the left pane, click **Public Folders**. The system displays the subfolders in the right pane.
7. Double-click the **SiteManager** folder.
8. Double-click the < **name of the desired report** >. The system may display a message to inform that the document is being processed.
9. When the prompt page displays, start at the top to make selections from all the required prompts and any optional prompts depending upon what you need to see in the report.

Note: The prompt label should indicate whether the prompt is required or optional.

- In the **Available Values** pane, click to select the desired value, then click the **single arrow (>)** button to move selections to the **Selected Values** pane.
 - Click the **double arrows (>>)** button to move all values from the **Available Values** pane to the **Selected Values** pane.
 - In the **Selected Values** pane, click to select the desired value, then click the **Remove** button to move selections to the **Available Values** pane.
 - Click the **Remove All** button to move all selections from the **Selected Values** pane to the **Available Values** pane.
 - In a text or date field, type the desired value.
 - In a dropdown list, select the desired value.
10. Click **OK**. The system generates the report.

Administering Contracts for Field Documentation

In this chapter, you will receive instruction about the following:

- Understanding New Contracts 2
- Viewing Contracts 4
- Viewing Contract Milestones 15
- Viewing Contract Projects 17
- Viewing Contract Items 19
- Viewing Contract Funding 21
- Viewing Subcontracts 23
- Summary 26
- Review Exercise 29

Understanding New Contracts

New contracts are loaded electronically from the AASHTOWare Project Preconstruction module and given a Pending status by default.

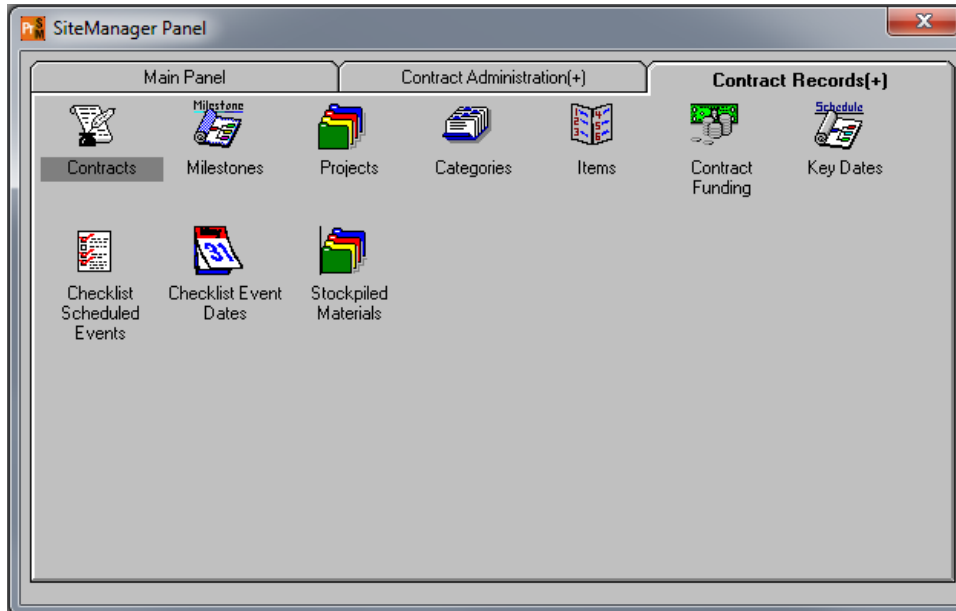


Figure 1. SiteManager Panel Window - Contract Records Panel

TO BEGIN TRACKING THE PROGRESS OF CONTRACT WORK IN SITEMANAGER, THE HEADQUARTERS FINANCE OFFICE WILL CHANGE THE CONTRACT'S STATUS TO ACTIVE.



Exercise 1

In this exercise, navigate to the Contracts window.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**

SHIFT-TAB IF USER ID IS NOT SELECTED.

1. Start and log onto SiteManager as user **jj00001** *while connected in server mode.*
2. On the **Main Panel** panel, double-click the **Contract Administration** icon.
3. On the **Contract Administration** panel, double-click the **Contract Records** icon.
4. On the **Contract Records** panel, double-click the **Contracts** icon. The system displays the Select Contract window.
5. In the **Contract ID** area, in the **Contract ID** column, scroll to and double-click **TRN349**. The system displays the Contracts window.

You've accessed the Contracts window.

Viewing Contracts

The Description panel of the Contract window displays the basic description data. This includes the contract's status, project number(s), administrative offices, and other descriptive information that determines how the system processes data for this contract.

Contract Time Charges

In SiteManager, the three types of time charges for contracts follow:

- **Completion Date** - Most contracts at TDOT will be set up as Completion Date contracts. This includes bridge, grade and drain, maintenance, and some resurfacing contracts. Time cannot be suspended on Completion Date contracts.
- **Calendar Day** – Used for TDOT's resurfacing contracts with a set number of bid days (completion date contracts with a working window). Time is started when the Notice to Proceed date is entered. Time cannot be suspended on calendar day contracts.
- **Working Days (Available Days)** - TDOT does not use now.

CLICK THE REMARKS BUTTON FOR ADDITIONAL CONTRACT DESCRIPTION INFORMATION.

ALL CONTRACTS WILL SHOW AS FEDERAL. THIS IS NOT A TRUE REPRESENTATION OF THE FUNDING. TO VIEW ACTUAL FUNDING GO TO THE FUNDING WINDOW.

HQ FINANCE WILL ACTIVATE IF FED OVERSIGHT CONTRACT. LOCAL OVERSIGHT WILL NOT BE USED.

SPEC YR FIELD DOES NOT REFERENCE A SPEC BOOK. THIS SHOWS THE ITEMS ARE FROM THE 2000 ITEM MASTER. (2001 ITEM MASTER IS METRIC).

Wage Decision ID	Wage Decision Description	Genl Wg Dcsn ID
F20070701	2007 Minimum Wage Scales for Federal-Aid Highway Construction	Federal

Figure 2. Contracts Window - Description Panel

MOST OF THE FIELDS ON THE CONTRACT WINDOW ARE LOADED FROM AASHTOWARE PROJECT PRECONSTRUCTION AND WILL NOT BE MODIFIED IN SITEMANAGER EXCEPT BY THE HEADQUARTERS CONSTRUCTION AND FINANCE OFFICES.

TDOT WILL PRIMARILY USE THE COMPLETION DATE CONTRACT TIME CHARGE TYPE.



Exercise 2

In this exercise, review the basic information for a new active contract.

User ID	jj00001	Password	pass
Connection	Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	TRN349		

1. On the **Description** panel, view the information available.
2. To which region and unit is this contract assigned? _____
3. How is time calculated on this contract? _____
4. What is the dollar value of this contract? _____

You've reviewed the region and unit assignment, time calculation and dollar value of this contract.

Viewing the Contract Location

The Location panel displays the contract location. Each contract must have one county selected as the primary county.

Contract County	Primary County
OVERTON	<input checked="" type="checkbox"/>

Figure 3. Contracts Window - Location Panel



Exercise 3

In this exercise, view the location for a contract.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN349**

1. Click the **Location** tab. The system displays the Location panel.
2. What is the primary county of contract **TRN349**? _____

You've viewed the contract's location.

Viewing Contract Payment Data

Use the Payment Data panel to automatically calculate common construction computations.

Contracts

Description Location **Payment Data** Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: TRN349 Current Contract Amt: \$14,657,837.81
 Generate Est1 Day: Contract Limit Amt: \$0.00 Liquidated Dam Rate Amt: \$12,939,362.51
 Generate Est2 Day: Contract Limit Pct: .00 Auto Liquidated Dam
 Price Adjmnt Ind

RETAINAGE

Securities Allowed Retain Stkipiled Ind Unlimited Escrow Max Escrow Amt: \$0.00

Retainage Changes:

Work Compl Basis	Effect Date	Pct	Pct Base	Max Pct	Max Amt	Lump Amt	Trgr Pct	Trgr Base
WORK IN PLACE	05/23/14	.00	CURRENT AMT	.00	\$0.00	\$0.00	.00	BID AMT

TDOT DOES NOT USE AUTO LIQ. DMG OR ANY OTHER FUNCTION OF THIS WINDOW.

Figure 4. Contracts Window - Payment Data Panel

THE FUNCTIONS OF THIS WINDOW WILL NOT BE USED.



Exercise 4

In this exercise, view the payment data for a contract.

User ID **jj00001** Password **pass**
 Connection **Server**
 Group Name **FIELD - Operations Inspector [INSP]**
 Prior Keys **TRN349**

1. Click the **Payment Data** tab. The system displays the Payment Data panel.

You've viewed the contract's payment data.

Viewing Critical Dates

The Critical Dates panel displays critical dates in the life of the contract. The critical date types were defined during system development and cannot be added or deleted. These dates are considered critical because SiteManager includes them in the standard contract reports. When a new contract is added from the AASHTOWare Project Preconstruction module, SiteManager includes the Critical Date types defined in the Default Critical Date reference table. A few of the dates, such as letting date, come over from the pre-construction system.

When an actual date is entered, the system can send notices to an individual recipient.

In SiteManager, the Notice to Proceed date is important because:

- It must be entered before any estimates may be generated.
- It starts charging time against the contract for fixed completion date contracts.

Tip: The Notice to Proceed date can only be entered when or after the contract status is changed to active. Although the Notice to Proceed date is not required for contract activation, it must be entered before any estimates may be generated.

Critical Date Description	Actual Date	Required to Activate	Required to Finalize
Execution Date	05/16/14	Y	N
Award Date	04/16/14	N	N
Open to Traffic Date	00/00/00	N	N
Contractor Default Date	00/00/00	N	N
Assigned to FieldManager Date	00/00/00	N	N
Notice to Proceed Date	05/17/14	N	N
Checked Out to Field Date	10/30/14	N	N
Price Adjustments Base Date	04/01/14	Y	N
Contractor Bankruptcy Date	00/00/00	N	N
Commissioner Approved Completion Date	00/00/00	N	N
Contractor Final Release Date	00/00/00	N	N
Original Completion Date	04/30/16	N	N
Contract Items Complete Date	00/00/00	N	Y

Critical Date Description: Execution Date
Actual Occurrence Date: 05/16/14 Required to Activate Required to Finalize
Distribution List: _____ **Recipient ID:** _____
Message Text: _____

Figure 5. Contracts Window - Critical Dates Panel

THE HEADQUARTERS FINANCE OFFICE UPDATES THE CRITICAL DATES PANEL.

THE HEADQUARTERS FINANCE OFFICE UPDATES THE NOTICE TO PROCEED DATE AFTER RECEIVING THE STARTING NOTICE REPORT FROM THE OFFICE STAFF.

SiteManager Critical Date	TDOT Term (if applicable)
Accepted Date	Final Inspection Date
Adjusted Completion Date	The original completion date altered by a Change Order (Supplemental) plus time adjustment for item overruns/underruns.
Assigned to FM Date	N/A
Award Date	Award Date
Checked Out to Field Date	System populated when the contract is pipelined out to standalone. Changed back to zero when checked back in.
Commissioner Approved Completion Date	The original completion date altered by a Change Order (Supplemental).
Contract Archived Date	N/A
Contract Items Complete Date	N/A
Contractor Bankruptcy Date	N/A
Contractor Default Date	N/A
Contractor Final Release Date	Claim Expiration Date (Advertisement Due Date)
Effective Date	Date the contractor is required to begin work for Completion Date contracts.
Execution Date	Accepted Date
Letting Date	Letting Date
Notice to Proceed Date	Effective Date or Work Begin Date (whichever is earlier). Time charges start on this date. For SP 108B Resurfacing, this is the begin date or at least as early as the number of days required before the original completion date.
Open to Traffic Date	N/A
Original Completion Date	The completion date established by the contract.
Price Adjustments Base Date	Auto-populated with first day of letting's month (even if no price adjustment exists)
Physical Work Complete Date	N/A
Signed Date	Signed Date
Substantial Work Complete Date	Date to Stop Charging Time (for Completion Date contracts)
Work Begin Date	Date Work Actually Began (Starting Notice)

NOTE DATES IN BOLD TEXT.

Table 1. TDOT Equivalents to Default Critical Dates



Exercise 5

In this exercise, view the actual date of a contract critical date for a contract.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN349**

1. Click the **Critical Dates** tab. The system displays the Critical Dates panel.
2. In the **Critical Date Description** column, scroll to and select **Notice to Proceed Date**. The system displays the data in the lower pane.
3. What is the **Notice to Proceed Date**? _____
4. What is the **Original Completion Date**? _____

DWRS CAN BE
CREATED
WITHOUT WORK
ITEMS PRIOR TO
THE NOTICE TO
PROCEED DATE.

You've viewed the actual dates of a couple critical dates.

Viewing Contract Primary Personnel

The Primary Personnel panel displays contract's primary state personnel. Every contract must have a project manager and a project engineer. When a user is designated as the project manager and/or project engineer on the contract, SiteManager adds that user to contract authority automatically. If primary personnel are later replaced, SiteManager starts authority for the new personnel and ends authority for the previous personnel.

WHEN PRIMARY PERSONNEL
ARE ADDED OR REMOVED ON
THIS PANEL, THE SYSTEM
ADDS OR REMOVES THEM ON
THE CONTRACT AUTHORITY
PANEL AUTOMATICALLY.

The terms project manager and project engineer are SiteManager terms and have no significance other than the fact that they are the first two to receive contract authority.

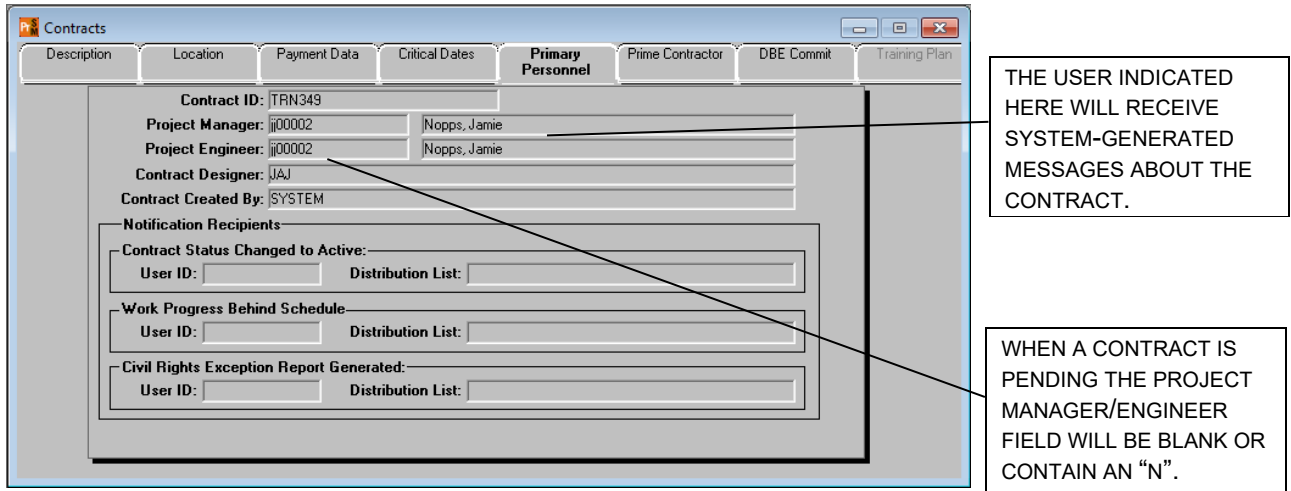


Figure 6. Contracts Window - Primary Personnel Panel

THE HEADQUARTERS CONSTRUCTION OFFICE WILL ENTER THE ASSIGNED DISTRICT SUPERVISOR IN BOTH THE PROJECT MANAGER AND PROJECT ENGINEER FIELD.



Exercise 6

In this exercise, view the project manager and project engineer assignments for a contract.

User ID **jj00001** Password **pass**
 Connection **Server**
 Group Name **FIELD - Operations Inspector [INSP]**
 Prior Keys **TRN349**

1. Click the **Primary Personnel** tab. The system displays the Primary Personnel panel.
2. Who is the Project Supervisor for contract **TRN349**?

You've viewed the project manager and project engineer assignments.

Viewing the Prime Contractor and Associates

The Prime Contractor panel displays the prime contractor, the prime contacts, and the prime associates. At a minimum, the system requires a prime contractor, surety company, and insurance company to be designated.

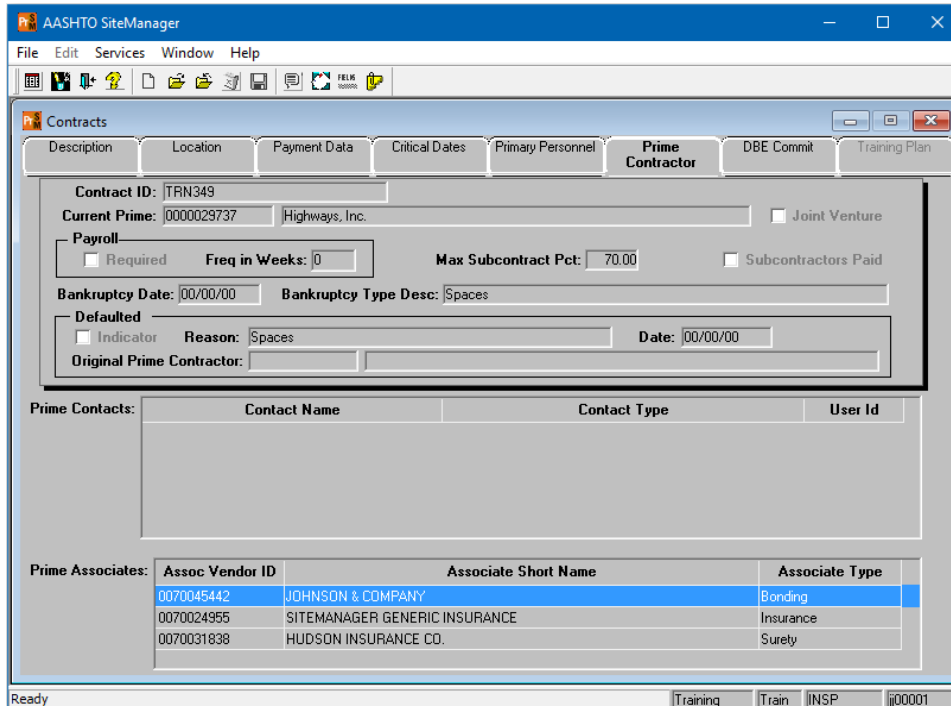


Figure 7. Contracts Window - Prime Contractor Panel

To view the contractor's address, click the Address button on the toolbar.

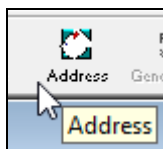


Figure 8. Contracts Window - Prime Contractor Panel – Address Button (detail)

SINCE TDOT DOES NOT RECORD AN INSURANCE COMPANY FOR THE PRIME CONTRACT, THE PLACEHOLDER VALUE, SITEMANAGER GENERIC INSURANCE, IS SUBSTITUTED FOR A REAL VALUE. TDOT WILL RECORD ACTUAL ASSOCIATES FOR BONDING AND SURETY.



Exercise 7

In this exercise, view the prime contractor and its surety and insurance companies for a contract.

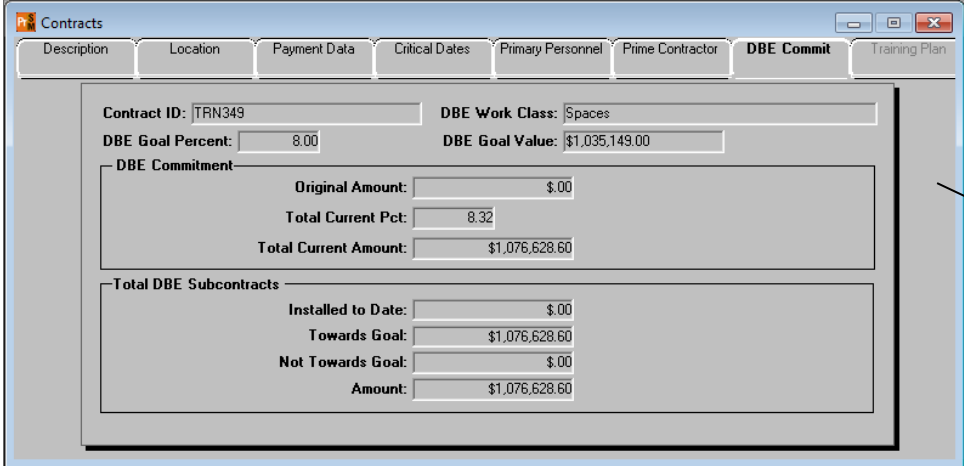
User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN349**

1. Click the **Prime Contractor** tab. The system displays the Prime Contractor panel.
2. Who is the prime contractor? _____
3. Who is the bonding company? _____
4. Who is the surety company? _____

You've viewed the prime contractor and its surety and insurance companies for a contract.

Viewing the DBE Commitment Goal

The DBE Commit panel displays the DBE commitments for a contract. If the prime contractor is a DBE, the user can also enter the DBE work class on this panel. The system calculates the DBE commitment amounts displayed on this panel using values entered on the Subcontracts window.



Contract Information	
Contract ID:	TRN349
DBE Work Class:	Spaces
DBE Goal Percent:	8.00
DBE Goal Value:	\$1,035,149.00

DBE Commitment	
Original Amount:	\$0.00
Total Current Pct:	8.32
Total Current Amount:	\$1,076,628.60

Total DBE Subcontracts	
Installed to Date:	\$0.00
Towards Goal:	\$1,076,628.60
Not Towards Goal:	\$0.00
Amount:	\$1,076,628.60

Figure 9. Contracts Window - DBE Commitment Panel



Exercise 8

In this exercise, view the DBE goal and commitment.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN349**

1. Click the **DBE Commit** tab. The system displays the DBE Commit panel.
2. What is the current percentage of the DBE commitment total?

3. **Close**. The system closes the Contract window and displays the SiteManager Panel window.

You've viewed the DBE goal and commitment.

Understanding the Training Plan Panel

The Training Plan panel has been grayed out because it is obsolete functionality deactivated by AASHTO.

Viewing Contract Milestones

FIELD – Operations Office Staff uses the Milestones window to modify and delete contract milestones. FIELD – Operations Office Staff also enters the dates the milestone work was started and completed.

TDOT IS USING THIS WINDOW AS A RECORD KEEPING OF DAYS CHARGED FOR MILESTONES. LIQUIDATED DAMAGES ARE TO BE ASSESSED UNDER THE APPROPRIATE PAY ITEM.

Milestone Time Charges

In SiteManager, the three types of milestone time charges for contracts include:

- **Calendar Day and/or Completion Date Milestone** – These types of milestones require the “work start” date and “actual completion” date be entered. There will be no charge on the Diary window Charge panel for these types of milestones. (Litter Cycles)
- **Working Days (Available Days)** – These types of milestones require the “work start” date and “actual completion” date be entered. It will also require days to be charged on the Diary window’s Charge panel for these types of milestones. (Mowing Cycles)

Mlstr Nbr	Description	Time Used(%)	Cur Mlstr Cmpl Date
03	Mowing Cycle 1	0.000	00/00/00
04	Mowing Cycle 2	0.000	00/00/00
05	Mowing Cycle 3	0.000	00/00/00
06	Litter Cycle 1	0.000	00/00/00

Milestone Nbr: 03 Description: Mowing Cycle 1

Time Charges: Working Days (Available Days) Bid Days: 20 Charged: 0 Adjusted: .0

Rate Time Period: Days Bid Hours: Remaining: 20 Credit Days: 0

Work Start: 06/01/13 00:00

Original Milestone Compl: 00/00/00 00:00

Current Milestone Compl: 00/00/00 00:00

Actual Completion: 00/00/00 00:00

Autogen Disincent Ind Preconstruction Ind

Autogen Incentive Ind Milestone Compl Ind

Incentive Rate Amt: \$.00

Disincentive Rate Amt: \$.00

Incentive Cap Amt: \$.00

Figure 10. Milestones Window

HQ FINANCE OFFICE WILL CREATE MILESTONES. OFFICE STAFF WILL START MILESTONES BY ENTERING THE MILESTONE WORK START DATE AND COMPLETION DATE. MILESTONES ARE USED FOR SUCH THINGS AS PHASED CONSTRUCTION, MOWING AND LITTER CYCLE.

TDOT WILL NOT AUTO GENERATE DISINCENTIVES OR INCENTIVES. THESE ARE APPLIED WITH PAY ITEMS. THE MILESTONE WINDOW IS USED AS SUPPORTING DOCUMENTATION FOR THESE PAY ITEMS.



Exercise 9

In this exercise, view a milestone for a contract.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN349**

1. On the **Contract Records** panel, double-click the **Milestones** icon.
The system displays the Milestones window.

***Note:** Milestones are typically used on mowing contracts only. Including a mowing milestone on this contract is an example for training purposes.*

2. How many milestones are currently listed for this contract? _____
3. Select milestone **03**.
4. What is the description of milestone 03? _____
5. What is the Work Start Date for milestone 03? _____
6. How many bid days is Mowing Cycle 1? _____
7. **Close**.

You've viewed milestones.

Viewing Contract Projects

The Projects window displays data related to the contract projects. There must be at least one project defined for each contract. New projects can be added while the contract is in pending or active status. To add a project to an active contract, an authorized user can create the project on the Description panel. Items must be added via change order.

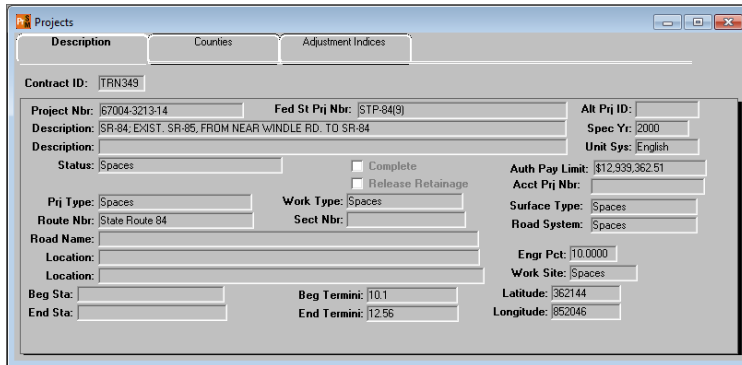


Figure 11. Projects Window - Description Panel



Exercise 10

In this exercise, review a project description for a contract.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN349**

1. On the **Contract Records** panel, double-click the **Projects** icon. The system displays the Select Contract Project window.
2. How many projects are on this contract? _____
3. In the **Project Nbr** area, in the **PCN** column, scroll to and double-click project **67004-3213-14**. The system displays the Projects window.
4. Review the **Description** panel.
5. What is the project description? _____
6. What is the route number? _____

You've viewed a project description.

Viewing Project Counties

The Counties panel displays project counties. For every county included in the project, the user is shown the percentage of the project work to be done in the county. The percentages for all counties must add up to 100%.

Project County	Proj Len %
OVERTON	100.00

Figure 12. Projects Window - Counties Panel



Exercise 11

In this exercise, review the project counties for a contract.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN349**

1. Click the **Counties** tab. The system displays the Counties panel.
2. In which county is this project located? _____
3. **Close.** The system closes the Projects window and displays the SiteManager Panel window.

You've viewed the project's county.

Viewing Contract Items

The Items panel displays items on the selected contract and project.

Contract ID: TRN349 Project Nbr: 67004-3213-14

Region Nbr: 67004-3213-14 Line Item Nbr: 0930

Item Code: 607-10.30 Units Type: Linear Feet Spec Year: 2000

Description: 54" PIPE CULVERT

Major Item: Specialty: Status Type: Active

Unit Price: \$143.00000 Bid Qty: 240.000 Bid Amt: \$34,320.00

Proposal Line Nbr: 0930 Related Item:

Critical: Pay Plan Qty: Suppl Desc Req'd: Material Discrepancy Adj:

Supplemental Descriptions:

CO Nbr: Pend CO Qty: 0 Pend CO Amt: 0 Net CO Qty: 0

THE CATEGORY FIELD LABEL DOES NOT DISPLAY PROPERLY IN INQUIRY MODE. SINCE THIS IS CONSIDERED A MINOR ISSUE, IT WILL PROBABLY NEVER BE FIXED.

Figure 13. Items Window

ITEMS KNOWN AS "ADD-ON" ITEMS ARE ADDED TO THE CONTRACT BEFORE IT IS ASSIGNED TO THE REGION. LINE ITEM NUMBERS, 9000 THRU 9499, DENOTE ADD-ON ITEMS. THESE ADD-ON ITEMS ARE THE ADJUSTMENT ITEMS APPROPRIATE FOR THE ITEMS OF THAT CONTRACT. ONCE THE CONTRACT IS ACTIVATED, ALL ADDITIONAL ITEMS ARE ADDED USING THE CHANGE ORDER FUNCTION. LINE ITEM NUMBERS, 9500 THRU 9999, DENOTE CHANGE ORDER ITEMS.

ADD-ON ITEMS WILL NEVER HAVE A BID QUANTITY IN THE CONTRACT ITEM WINDOW, BECAUSE THEY ARE NOT BID ON BY THE CONTRACTOR.

THE MAJOR ITEM INDICATOR WILL BE CHECKED FOR THOSE ITEMS DETERMINED TO BE MAJOR ITEMS DURING THE CONTRACT ACTIVATION PROCESS.



Exercise 12

In this exercise, review an item for a contract.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN349**

1. On the **Contract Records** panel, double-click the **Items** icon. The system displays the Select Contract Item window.
2. In the **Project** area, in the **PCN** column, scroll to double-click **67004-3213-14**.

Review an item.

THIS IS AN ADD-
ON ITEM.

3. In the **Contract Item** area, to sort by item code, click the **Item Code** column heading.
4. In the **Item Code** column, scroll to and double-click **109-01.01** for line number **9028** and category **0100**. The system displays the item record for **PAY ADJUSTMENT FOR FUEL**.
5. What is the unit price? _____
6. What is the bid quantity? _____

Review another item.

7. Click **Open**.
8. In the **Contract Item** area, to sort by item code, click the **Item Code** column heading.
9. In the **Item Code** column, scroll to and double-click **607-10.30** for line number **0930** and category **0100**. The system displays the item record for **54" PIPE CULVERT**.
10. What is the unit price? _____
11. What is the bid quantity? _____
12. **Close**. The system closes the Items window and displays the SiteManager Panel window.

You've reviewed a contract item.

Viewing Contract Funding

Use the Contract Funding window to view funding for the whole contract and for the contract's projects, categories, and line items. The Contract Funding window lists the current funding specifications in the upper pane and data for the selected funding record in the lower pane. If the user adds funding that does not match the funding selection on the Contract window's Description panel (that is, Federal, State/Province, or Both), SiteManager automatically updates the Contract window's Description panel.

Active contracts must be fully funded. For any part of the contract funded by multiple sources, the combined funding must equal 100%. If more than one priority level is assigned, the combined funding for each priority level must equal 100%. In addition, each funding source can be assigned a cap amount. When the highest priority funding source reaches its cap amount, the funding source with the next highest priority continues the funding. If the lowest priority level fund has a cap amount, the cap amount will be ignored until a lower level fund is added.

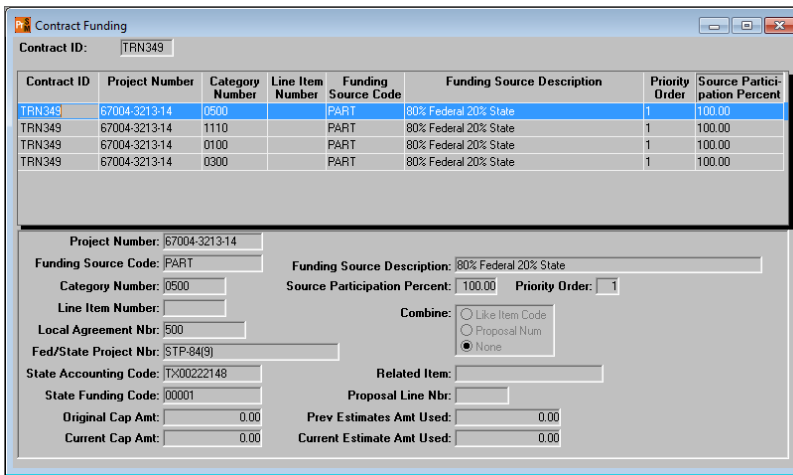
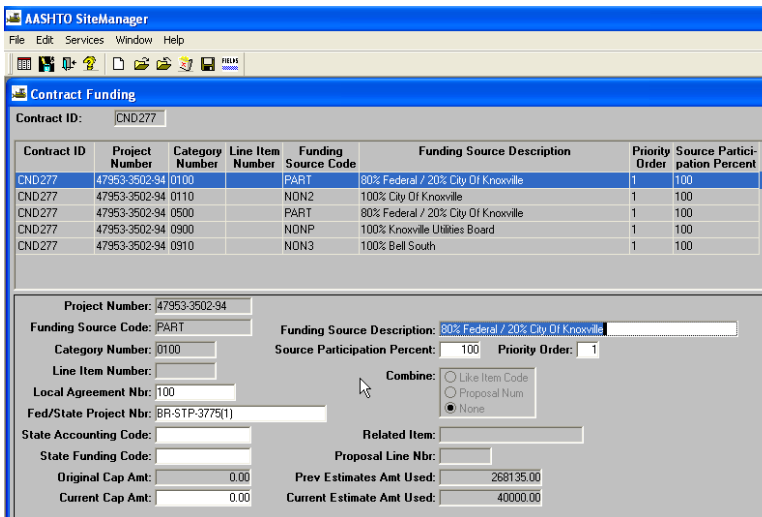


Figure 14. Contract Funding Window



THIS SHOWS A MORE COMPLEXLY FUNDED CONTRACT THAN THE ONE IN TRAINING.

Figure 15. Contract Funding Window (Example of More Complex Funding)

THE CONTRACT FUNDING WINDOW IS LOADED FROM THE AASHTOWARE PROJECT PRECONSTRUCTION MODULE.
THE CATEGORY NUMBER IDENTIFIES THE FUNDING SOURCE AND MUST BE GIVEN ATTENTION WHEN RECORDING WORK IN A DWR.



Exercise 13

In this exercise, view the Contract Funding window for a contract.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN349**

1. On the **Contract Records** panel, double-click the **Contract Funding** icon.
2. View the funding for the contract.
3. Examine Figure 15 for an example of a more complexly funded contract.
4. **Close.** The system closes the Contract Funding window and displays the SiteManager Panel window.

You've viewed the Contract Funding window.

Viewing Subcontracts

Use the Subcontracts window to view approved subcontractor information including DBE commitment amounts, parent subcontracts and lower level subcontracts.

	Amounts	Pct of Total Sub'd	Pct of Total Contract
This SubContract:	89,154.80	7.27	.61
This Original Commitment :	.00	0	.00
This Current Commitment:	89,154.80	8.28	.61

Total Original Commitment:	.00		.00
Total Current Commitment:	1,076,628.60		7.35
Total Allowable Max (non-spcly):	9,506,596.22		64.86
Total Towards Max (non-spcly):	1,076,628.60		7.35
Total Spclty Subcontracted:	150,000.00		1.02
Total Subcontracted:	1,226,628.60		8.37

Figure 16. Subcontracts Window - Description Panel

IF A SUBCONTRACTOR IS NOT ASSOCIATED WITH CONTRACT ITEMS AND APPROVED, THE INSPECTOR WILL NOT BE ABLE TO GIVE THE SUBCONTRACTOR CREDIT FOR INSTALLING WORK ITEMS ON THE DAILY WORK REPORT.

SITEMANAGER DEFINES "COMMITMENT" AS DBE COMMITMENT. SUBCONTRACTS THAT ARE NOT DBE ARE NOT INCLUDED IN THE COMMITMENT DATA.

HQ CONSTRUCTION WILL LOAD ALL SUBCONTRACTS INTO SITEMANAGER AND ENTER THE APPROVAL DATE. THE FIELD OFFICE WILL ADD THE EQUIPMENT AND PERSONNEL TO THE SUBCONTRACTOR'S DWR MASTER LIST FOR THE CONTRACT.

NESTED SUBCONTRACTS HAPPEN WHEN A SUBCONTRACTOR SUBCONTRACTS PART OF THE WORK TO ANOTHER SUBCONTRACTOR. NESTED SUBCONTRACTORS ARE REFERRED TO AS 2ND, 3RD, AND SO ON TIER SUBCONTRACTS.



Exercise 14

In this exercise, view a subcontract description for a contract.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN349**

1. Click the **Contract Administration** tab. The system displays the Contract Administration panel.
2. Double-click the **Contractor Management** icon. The system displays the Contractor Management panel.
3. Double-click the **Subcontracts** icon. The system displays the Select Contract ID window.
4. How many subcontracts are there for this contract? _____
5. How many subcontractors are DBE's for this contract? _____
6. In the **Subcontract** area, in the **Subcontractor** column, scroll to and double-click **TENNESSEE TEXTURE, LLC**, subcontract **0000003**.
7. What is the approval date for this subcontract? _____
8. Is this a "nested" subcontract? _____

You've viewed a subcontract.

Viewing Subcontract Items

Use the Subcontracts window's Items panel to view subcontract items. The subcontract amount is the sum of all the item amounts and the user cannot modify it.

IF A SUBCONTRACTOR IS NOT ASSOCIATED WITH CONTRACT ITEMS AND APPROVED, THE INSPECTOR WILL NOT BE ABLE TO GIVE THE SUBCONTRACTOR CREDIT FOR INSTALLING WORK ITEMS ON THE DAILY WORK REPORT.

Project Number	Line Item	Item Code	Units Type	Specialty	Short Description
67004-3213-14	2630	604-04.01	Square Yard	N	APPLIED TEXTURE FINISH (NEW STRUCTURES)

	Quantity	Unit	Price \$	Amount \$
Contract Bid:	13111.000	Square Yard	6.80000	89,154.80
Current Contract:	13111.000	Square Yard	6.80000	89,154.80
Parent Subcontract:	.000		.00000	.00
This Subcontract:	13,111.000	Square Yard	6.80000	89,154.80

Subcontract Amount: 89,154.80

Figure 17. Subcontracts Window - Items Panel



Exercise 15

In this exercise, view a subcontract item for a contract.

User ID **jj00001** Password **pass**
 Connection **Server**
 Group Name **FIELD - Operations Inspector [INSP]**
 Prior Keys **TRN349**

1. Click the **Items** tab. The system displays the Items panel.
2. How many items are on this subcontract? _____
3. What is the total quantity and dollar amount for item **604-04.01, APPLIED TEXTURE FINISH (NEW STRUCTURES)** for project number **67004-3213-14** and line item **2630**? _____
4. **Close**. The system closes the Subcontracts window and displays the SiteManager Panel window.

You've viewed a subcontract item.

Summary

To access the Contract Records panel:

1. On the **Main Panel** panel, double-click **Contract Administration** icon.
2. Double-click the **Contract Records** icon.

To open a contract in the Contracts window:

1. Navigate to the **Contract Records** panel,
2. Double-click the **Contracts** icon. The system displays the Contracts window.
3. On the Contracts window's toolbar, click **Open**. The system displays the Select Contract window.
4. In the **Contract ID** column, scroll to and double-click the desired contract ID or perform a Find. The system closes the Select Contract window and displays the desired contract.

To view a contract's description:

1. On the Contracts window. click the **Description** tab.

To view a contract location:

1. On the Contracts window. click the **Location** tab.

To view a contract's payment data:

1. On the Contracts window. click the **Payment Data** tab.

To view the actual date of a contract critical date:

1. On the Contracts window. click the **Critical Dates** tab.
2. In the **Critical Date Description** area, scroll to and select the desired date. The system displays the desired data in the lower pane.

To view primary personnel for a contract:

1. On the Contracts window. click the **Primary Personnel** tab.

To view a prime contractor:

1. On the Contracts window. click the **Prime Contractor** tab.

To view the DBE goal for a contract:

1. On the Contracts window, click the **DBE Commitments** tab.

To view a milestone for a contract:

1. On the **Contract Records** panel, double-click the **Milestones** icon. The system displays the Select Contract window.
2. In the **Contract ID** list box, scroll to and double-click the desired contract.

To view a project on a contract:

1. On the **Contract Records** panel, double-click the **Projects** icon. The Projects panel opens.
2. To select both a contract and a project, click the **Open** button. The system displays the Select Contract ID window.
3. In the **Contract ID** area, scroll to and double-click the desired contract.
4. In the **Project** area, scroll to and click the desired project.
5. Click **OK**. The system displays the Projects window.

To view a project county:

6. On the Projects window, click the **Counties** tab.

To view an item on a contract:

1. On the **Contract Records** panel, double-click the **Items** icon. The system displays the Items window.
2. Click **Open**.
3. In the **Contract ID** area, scroll to and double-click the desired contract.
4. In the **Project** area, scroll to and click the desired project.
5. In the **Item** area, scroll to and click the desired item.
6. Click **OK**. The system displays the Items window.

To view contract funding:

1. On the **Contract Records** panel, double-click the **Contract Funding** icon.
2. In the **Contract ID** area, double-click the desired contract.
3. Click **OK**. The system displays the window.

To view a subcontract:

1. On the **Contractor Management** panel, double-click the **Subcontracts** icon. The system displays the Subcontracts window.
2. Click **Open**. The system displays the Select Contract window.
3. In the **Contract ID** area, scroll to and double-click the desired contract.
4. In the **Subcontract** area, scroll to and click the desired subcontract.
5. Click **OK**. The system displays the Subcontract window.

To view an item on a subcontract:

1. On the Subcontract window, click the **Items** tab.

Review Exercise

In this exercise, review a contract.

User ID	jj00001	Password	pass
Connection	Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	TRN349		

1. Navigate to the Contracts window.
2. Open contract **TRN350**.
3. To which region and unit is this contract assigned? _____
4. What is the work type for this contract?

5. What is the execution date of the contract? _____
6. What is the bonding company?

7. Navigate to the Milestones window.
8. Has milestone **01** on contract **TRN350** been started? _____
9. Navigate to the Projects window.
10. How many projects are on this contract? _____
11. Navigate to the Items window.
12. Open contract **TRN350**, project **67004-3213-14**, category **0500**, line item number **2700**, item code **620-05.01 CONC PARAPET SINGLE SLOPE (STD-1-1SS)**.
13. What is the bid quantity? _____
14. Is it on a change order? _____
15. Navigate to the Contract Funding window.
16. How many categories are there on project **67004-3213-14**? _____
17. Navigate to the **Contractor Management** panel.
18. Navigate to the Subcontracts window and open subcontract **00000002** on contract **TRN350**.
19. Who is the subcontractor? _____

20. Is this subcontractor a DBE? _____
21. Is this subcontractor approved to install line item **2630**, item code **604-04.01**? _____
22. **Exit SiteManager.**

Creating Daily Work Reports for Field and Office Documentation (Part 1)

In this chapter, you will receive instruction about the following:

▪ Understanding Daily Work Reports	2
▪ Entering Basic Daily Work Report Information	5
▪ Entering Contractor Activity	7
▪ Modifying Personnel Type Master List	10
▪ Entering Contractor Equipment Activity	11
▪ Entering Daily Staff Activity	14
▪ Selecting and Recording Work Items	16
▪ Selecting and Recording to a DWR Template	20
▪ Additional Examples of DWR Templates	23
▪ Previewing a DWR	24
▪ Summary	29
▪ Review Exercise	35

Understanding Daily Work Reports

The user creates daily records of construction activity in Daily Work Reports (DWRs). SiteManager lets the user create DWRs on the standalone workstation in the field. Before the inspector can create the first DWR for a contract in standalone mode, the basic contract data and LIMS reference data must be downloaded from the SiteManager server's database to the user's standalone workstation. Typically, for each contract, each user submits one DWR per day. Only the user who creates the DWR may modify it.

SITEMANAGER WILL NOT ALLOW TWO DWRS TO BE CREATED BY THE SAME USER FOR THE SAME CONTRACT ON THE SAME DAY.

The Daily Work Report Select panel lets the user open a DWR. The panel lists all the DWRs stored on the workstation for the selected contract and the selected user ID. The user can only access the DWRs stored in the local database. The user can open any DWR in the database, but the user cannot modify a report the user did not create. The DWR opens as read-only if the system finds one of the following:

- DWR has been transferred to the server or standalone database
- DWR has been authorized
- DWR was authored by another user

The screenshot shows the 'Daily Work Reports' application window with the 'DWR Info' panel active. The interface includes several tabs: 'DWR Info', 'Contractors', 'Contractor Equip.', 'Daily Staff', 'Work Items', and 'Force Accounts'. The 'DWR Info' tab contains the following fields and controls:

- Contract ID:** (empty)
- Inspector:** Bell, Troy
- DWR Date:** 10/07/16
- Locked:** No
- Authorized:** No
- Authorized Date:** 00/00/00
- Temperature:** High: 0, Low: 0
- Weather Conditions:** A.M.: (dropdown), P.M.: (dropdown)
- No Work Items Installed:**
- No Contractors On Site:**
- No Daily Staff On Site:**
- Work Suspended:**
- Suspended Time:** 00:00
- Resumed Time:** 00:00
- Remarks:** (text area)
- Spell Check:** (button)

Figure 1. Daily Work Reports Window - DWR Info Panel (Before Choosing Keys)

THE LEAD INSPECTOR WILL COMPLETE A DWR FOR EVERY DAY DURING THE LIFE OF A PROJECT INCLUDING WEEKENDS AND HOLIDAYS. OTHER INSPECTORS WILL CREATE DWRS FOR ANY DAY THEY ARE ON-SITE OR REPORTING WORK. INSPECTORS CREATE DWRS IN STANDALONE MODE. OFFICE STAFF CREATES DWRS IN SERVER MODE TO DOCUMENT TRAFFIC CONTROL, TICKETED ITEMS, AND SO ON.

Note: Inspectors should make sure the network cable is unplugged from the laptop when creating a DWR in standalone mode. This is a precaution to avoid accidentally creating the DWR on the server.

The Daily Work Reports window has the following panels:

DWR Info

Use the DWR Info panel to create a new DWR and collect information about the day for which the report was created.

Contractors

Use the Contractors panel to enter daily data about the Prime and Subcontractor(s), Supervisor(s), and variable labor (by personnel type). TDOT will not use the Supervisor section of the window.

Contractors Equip

Use the Contractor Equip panel to document the daily presence and use of equipment on the job site for a selected Contractor.

Daily Staff

Use the Daily Staff panel to enter daily information on state employees and consultants. Each entry shows how many hours the staff member worked.

Work Items

Use the Work Items panel to view and add daily usage data for installed Work Items.

Force Accounts

TDOT will not use this feature.

CONTRACTORS PANEL INCLUDES THE CONTRACTOR'S SUPERVISORS/FOREMAN BY NAME, WHICH WILL NOT BE USED BY TDOT.

PERSONNEL TYPE IS NOT AN EMPLOYEE NAME, BUT RATHER A JOB TITLE - UNSKILLED LABORER, TRUCK DRIVER OR CLASS A OPERATOR. TDOT WILL RECORD SUPERINTENDENT / FOREMAN AS PERSONNEL TYPES.



Exercise 1

In this exercise, log on in Standalone mode as an Inspector and navigate to the Daily Work Reports window.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector [INSPST]**

1. Start and log onto SiteManager as user **jj00004** *while connected in standalone mode.*
2. On the **Main Panel**, double-click the **Daily Work Reports** icon.
3. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.

BE SURE TO
CHANGE TO
STANDALONE.

You've logged on and accessed the Daily Work Reports window.

Choosing Keys

When the user first enters the Daily Work Report window to create a new DWR, the user must first select Choose Keys from the Services menu. By selecting Choose Keys, the user is given a list of contracts for which to create DWRs. If a user enters the Daily Work Report window to open an existing record, he or she must click the Open button and select the existing DWR. To create a new DWR for the same contract as the existing DWR, the user must click the New button. To create a new DWR on a different contract, the user must click the New button and then select Choose Keys from the Services menu to choose a contract.

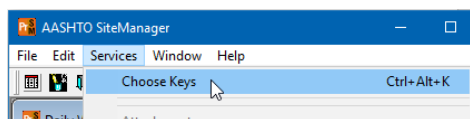


Figure 2. Daily Work Reports Window – Services Menu – Choose Keys (Detail)

Entering Basic Daily Work Report Information

The DWR Info panel lets the user create a new DWR and collect information about the day for which the DWR was created. For example, the user enters the weather conditions and high and low temperatures for the day here. The name of the author of this report is displayed in the Inspector field. The date covered by this report is displayed in the DWR Date field. The Locked and Authorized fields indicate the state of the DWR. A locked DWR has been transferred via pipeline to a standalone database and has not been transferred back to the server. An authorized DWR has been approved for payment. If either the Locked or Authorized field displays **Yes**, the user cannot modify the DWR.

This panel has three check boxes — No Work Items Installed, No Contractors On Site, and No Daily Staff On Site — that indicate there is no data for the subject. These boxes are selected by default. When the user enters data for the subject on another panel, the corresponding check box is cleared automatically.

General remarks are also recorded on this panel. To record a remark, the user must first select a remark type. If a remark has already been entered for the selected type, as indicated by a check mark next to the type, the remark appears in the Remarks field. A remark does not have a size limit, and can be pasted to and from a word processor.

LOCKED = PIPED

DWRS PAID ON AN ESTIMATE CANNOT BE CHANGED, ALTHOUGH LOCKED INDICATOR WILL BE N.

AUTHORIZED = APPROVED IN DIARY

EMPHASIZE THAT THE SYSTEM CLEARS THESE CHECK BOXES AS USERS ENTER DATA ON THE PANELS.

CONTRACTOR EQUIPMENT & PERSONNEL TYPES WILL NOT BE DOCUMENTED IN THE WORK PERFORMED REMARKS BUT SHOULD BE INCLUDED ON THE CONTRACTOR AND CONTRACTOR EQUIPMENT PANELS.

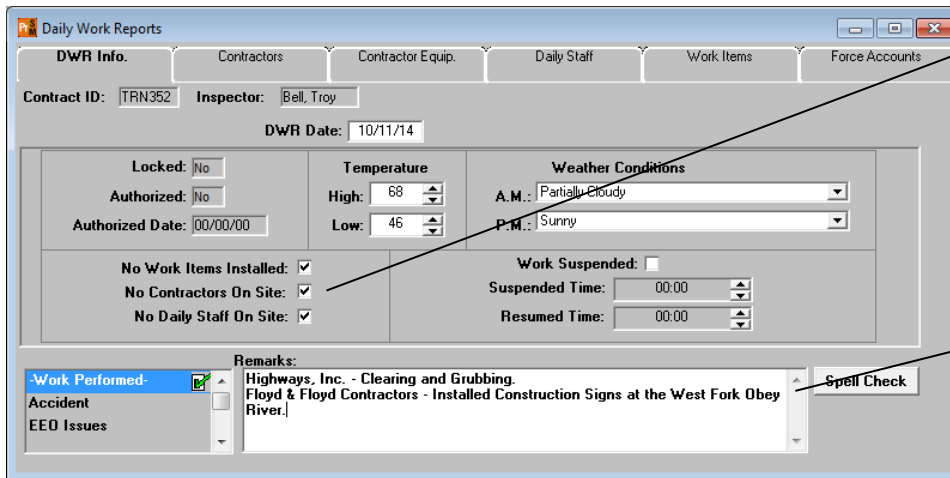


Figure 3. Daily Work Reports Window - DWR Info Panel

FIELD USERS ARE REQUIRED TO COMPLETE THE DWR DATE, TEMPERATURE, WEATHER CONDITIONS, AND APPROPRIATE REMARKS ('WORK PERFORMED' AT A MINIMUM) ON THE PROJECT FOR THE DATE OF THE DWR.

FOR THE 'WORK PERFORMED' REMARKS TYPE, THE FIELD USER SHOULD ENTER THE CONTRACTOR'S NAME, DETAILS REGARDING THE ITEM WORK PROGRESS, AND THE LOCATION WHERE THE WORK IS PERFORMED.



Exercise 2

In this exercise, create a new DWR and complete the DWR Info panel.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector [INSPST]**

1. While on the **DWR Info** panel, from the **Services** menu, select **Choose Keys**.
2. In the **Contract ID** column, scroll to and double-click **TRN352**.
The system displays the Daily Work Reports window.

Record the date.

3. In the **DWR Date** field, type **101114**.

Record the temperatures.

4. In the **High Temperature** field, type **68** degrees.
5. In the **Low Temperature** field, type **46** degrees.

THE LOW
TEMPERATURE
MUST BE
RECORDED AS
LESS THAN OR
EQUAL TO THE
HIGH
TEMPERATURE.

Record the conditions.

6. In the **A.M.** dropdown list, select **Partially Cloudy**.
7. In the **P.M.** dropdown list, select **Sunny**.

Add a remark about the work performed.

8. In the **Remarks Type** list box, scroll to and click **-Work Performed-**.
9. In the **Remarks** text box, type **Highways, Inc. - Clearing and Grubbing**.
10. On the keyboard press **Enter**.
11. On the new line, type **Floyd & Floyd Contractors - Installed Construction Signs at the West Fork Obey River**.

Add a remark about a visitor to the job site.

12. In the **Remarks Type** list box, scroll to and click **Visitor**.
13. In the **Remarks** text box, type **Regional Director arrived on project at 10:00 AM and advised installation of additional series signs at station 25+50 intersection of Walnut Grove Rd**.
14. **Save**.

You've created a new DWR and completed the DWR Info panel.

Entering Contractor Activity

The user enters daily data about the contractor and variable labor (by personnel type) on the Contractors panel and enters equipment usage on the Contractors Equipment panel. The user can select the contractor from a dropdown list of contractors and subcontractors authorized to work on the contract. The Prime Contractor is always at the top of the dropdown list. The user must select a contractor before recording installed work items.

After selecting a contractor, the user can select personnel types associated with the selected contractor from the dropdown lists in the Personnel Type area.

Contractor	Nbr of Supervisors	Nbr of Workers	Contractor Hrs Worked
0000029737 Highways, Inc. ** PRIME **			1 .000
0000116604 Floyd & Floyd Contractors		5	.000

Supervisor/Foreman Name	Hours Worked

Personnel Type	Nbr of Persons	Hours Worked	Total Hours
Foreman	1	0.000	.000
Truck Driver	1	0.000	.000
Unskilled Laborer	3	0.000	.000

ONLY SUBCONTRACTORS ASSOCIATED WITH THE CONTRACT AND APPROVED FOR SPECIFIC WORK ITEMS ARE ACCESSIBLE FROM THE CONTRACTOR DROPDOWN LIST.

THIS IS A THREE-FOCUS WINDOW.

TDOT DOES NOT USE THE SUPERVISOR/ FOREMAN NAME SECTION ON THE CONTRACTOR'S PANEL.

Figure 4. Daily Work Reports Window - Contractors Panel

Prime Contractor and Subcontractors

The Contractor dropdown list will contain the Prime Contractor and any qualified subcontractors. The Prime Contractor will be the first contractor in the dropdown list.

Subcontractors are qualified for specific work items in the Subcontract window of the Contract Administration component of SiteManager. The subcontractor is not available to select on a DWR prior to that subcontractor's approval date for the contract.

IF THE SUBCONTRACTOR DOES NOT HAVE AN APPROVAL DATE, IT WILL NOT DISPLAY.

ALL CONTRACTORS (PRIME CONTRACTORS AND SUBCONTRACTORS) ON SITE SHOULD BE INDICATED ON THE DAILY WORK REPORTS WINDOW'S CONTRACTORS PANEL. IF THE SUBCONTRACTOR IS ON SITE, THE USER MUST INDICATE THE SUBCONTRACTOR IN THE CONTRACTOR AREA OF THE CONTRACTORS PANEL. IF THE SUBCONTRACTOR IS NOT ON THE DROPDOWN LIST FOR THIS CONTRACT, CONTACT THE FIELD OFFICE SO IT MAY BE ADDED.



Exercise 3

In this exercise, add a Prime Contractor and a subcontractor to a DWR.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector [INSPST]**
Prior Keys **TRN352 (contract); 10/11/14 (DWR)**

Record the prime contractor on site today.

1. Click the **Contractors** tab. The system displays the Contractors panel.
2. Click in the **Contractor** pane, then click the **New** button. The system inserts a blank row.
3. In the **Contractor** dropdown list, click **Highways, Inc. ** PRIME ****
4. **Save.**

DO NOT EDIT
AUTO-
POPULATED
VALUES IN THE
NBR OF
SUPERVISORS
OR NBR OF
WORKERS
FIELDS.

Record the subcontractor on site today.

5. Click **New** again. The system inserts a blank row.
6. In the **Contractor** dropdown list, select **Floyd & Floyd Contractors.**
7. **Save.**

You've completed the Contractors panel.

Contractor Supervisor

DO NOT USE THE SUPERVISOR/FOREMAN SECTION OF THE WINDOW. INSTEAD ALL SUPERVISOR/FOREMAN INFORMATION WILL BE RECORDED FOR EACH CONTRACTOR IN THE PERSONNEL TYPE SECTION OF THE CONTRACTOR PANEL.

Contractor Personnel

The Personnel Type dropdown list contains personnel types added to the Contract Master List.

THE USER WILL RECORD ALL PERSONNEL TYPES ON SITE FOR EACH CONTRACTOR INDICATED ON THE CONTRACTOR LIST. THE HOURS WORKED FIELD IS NOT A REQUIRED FIELD AND SHOULD REMAIN BLANK. IF ANY ADDITIONAL DETAILS ARE REQUIRED, THE USER WILL ENTER THE INFORMATION IN THE REMARKS FIELD.

IF THE REQUIRED PERSONNEL TYPE IS NOT ON THE DROPDOWN LIST, CONTACT THE FIELD OFFICE SO IT MAY BE ADDED TO THE DWR MASTER LIST.



Exercise 4

In this exercise, add a personnel type to the contractor on site.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector [INSPST]**
Keys **TRN352 (contract); 10/11/14 (DWR)**

Add a personnel type for the subcontractor on site today.

1. In the **Contractors** pane, select the **Floyd & Floyd Contractors** contractor.
2. Click in the **Personnel Type** pane, then click the **New** button.
The system inserts a blank row.
3. In the **Personnel Type** dropdown list, select **Foreman**.
4. In the **Nbr of Persons** field, type **1**.

Add another personnel type for the subcontractor on site today.

5. Click the **New** button. The system inserts a blank row.
6. In the **Personnel Type** dropdown list, select **Truck Driver**.
7. In the **Nbr of Persons** field, type **1**.

Add another personnel type for the subcontractor on site today.

8. Click the **New** button. The system inserts a blank row.
9. In the **Personnel Type** dropdown list, select **Unskilled Laborer**.
10. In the **Nbr of Persons** field, type **3**.
11. **Save**.

Add personnel for the prime contractor on site today.

12. In the **Contractors** pane, select the contractor **Highways, Inc.**
13. Click the **Personnel Type** pane.
14. Click the **New** button. The system inserts a blank row.
15. In the **Personnel Type** dropdown list, select **Foreman**.
16. In the **Nbr of Persons** field, type **1**.
17. **Save**.

You would typically add more personnel at this point, but we will continue through the DWR for training purposes.

Modifying Personnel Type Master List

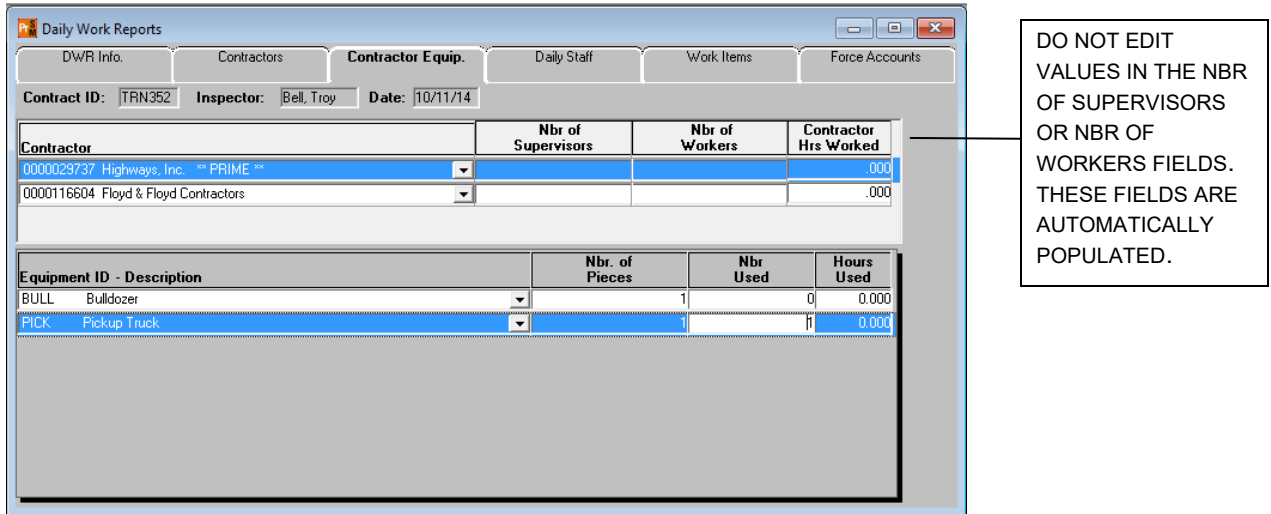
Maintain the Personnel Type Master List for each contractor. The HQ Construction Office maintains the Vendor Master Lists, while the Field Office maintains the Contract Master List.

As subcontracts are added to the contract, the subcontractor's personnel and equipment must be added to the Contract Master List to allow reporting of these in the DWR. *This process is included in the Activating Contracts for Office Documentation chapter of the SiteManager for Office Documentation course.*

Entering Contractor Equipment Activity

On the Contractor Equip panel, document the presence and use of equipment on the job site for the selected contractor. Enter the number of pieces of each equipment type on the site on this date and the number of pieces used. Users must select the contractor before entering equipment information for the contractor.

After selecting a contractor, select equipment IDs from the dropdown list in the Equipment ID - Description pane.



Contractor	Nbr of Supervisors	Nbr of Workers	Contractor Hrs Worked
0000029737 Highways, Inc. ** PRIME **			.000
0000116604 Floyd & Floyd Contractors			.000

Equipment ID - Description	Nbr. of Pieces	Nbr Used	Hours Used
BULL Bulldozer	1	0	0.000
PICK Pickup Truck	1	1	0.000

Figure 5. Daily Work Reports Window - Contractor Equip Panel

RECORD THE TYPE OF EQUIPMENT, NUMBER OF PIECES, AND NUMBER OF PIECES USED. TDOT WILL NOT USE THE 'HOURS USED' FIELD.

IF AN EQUIPMENT SELECTION IS NOT AVAILABLE, CONTACT THE FIELD OFFICE SO IT MAY BE ADDED TO THE DWR MASTER LIST.



Exercise 5

In this exercise, add equipment to the contractor on site for a DWR.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector [INSPST]**
Keys **TRN352 (contract); 10/11/14 (DWR)**

1. On the **Daily Work Reports** window, click the **Contractor Equip** tab. The system displays the Contractor Equip panel.

Add equipment for the subcontractor.

2. In the **Contractor** pane, select **Floyd & Floyd Contractors**.
3. Click in the **Equipment ID - Description** pane, then click the **New** button. The system inserts a blank row.
4. In the **Equipment ID - Description** dropdown list, select **Pickup Truck**.
5. In the **Nbr. of Pieces** field, type **2**.
6. In the **Nbr Used** field, type **2**.

MAY NEED TO
CLICK IN THE
NBR OF PIECES
FIELD FIRST TO
ACTIVATE DROP-
DOWN LIST.

Add another piece of equipment for the subcontractor.

7. Click the **New** button. The system inserts a blank row.
8. In the **Equipment ID - Description** dropdown list, select **Bobcat**.
9. In the **Nbr. of Pieces** field, type **1**.
10. In the **Nbr Used** field, type **1**.
11. **Save**.

Add equipment for the prime contractor.

12. In the **Contractor** pane, select **Highways, Inc.**
13. Click in the **Equipment ID - Description** pane.

Record a piece of equipment that was unused.

14. On the toolbar, click the **New** button. The system inserts a blank row.

15. In the **Equipment ID - Description** dropdown list, select **Bulldozer**.
16. In the **Nbr. of Pieces** field, type **1**.
17. In the **Nbr Used** field, type **0**.

Record a piece of equipment that was used.

18. On the toolbar, click the **New** button. The system inserts a blank row.
19. In the **Equipment ID - Description** dropdown list, select **Pickup Truck**.
20. In the **Nbr. of Pieces** field, type **1**.
21. In the **Nbr Used** field, type **1**.
22. **Save**.

You've completed the Contractor Equip panel.

Modifying the Equipment Master List

Maintain an Equipment Master List for each contractor. HQ Construction Office maintains the Vendor Master List, while the Field Office maintains the Contract Master List.

As subcontracts are added to the contract, the subcontractor's personnel and equipment must be added to the master list to allow reporting of these in the DWR. *This process is included in the Activating Contracts for Office Documentation chapter of the SiteManager for Office Documentation course.*

Entering Daily Staff Activity

The Daily Staff panel lets the user enter daily information on state employees and consultants. Each entry shows how many hours the staff member worked. The user selects staff members from the dropdown list in the Staff Member field. The user may also enter remarks for each line of daily staff recorded.

Staff Member	S/C	Work Code	Reg. Hours	OT Hours	Vehicle ID	Starting Mileage	Ending Mileage
Alber, Jane	S		7.500	.000			
Little, Janice	S		7.500	.000			

Figure 6. Daily Work Reports Window - Daily Staff Panel

STAFF HOURS CUSTOM REPORT WILL SHOW TDOT STAFF AND HOURS SO YOU CAN TRANSFER THE DATA TO THE TIME CARD. INFORMATION REGARDING CONSULTANTS CAN BE VIEWED BY RUNNING THE CONSULTANT HOURS CUSTOM REPORT.

PER POLICY, THESE FIVE FIELDS REMAIN BLANK.

THE DISTRICT SUPERVISOR WILL DETERMINE WHICH USER WILL RECORD THE NAME OF THE TDOT STAFF MEMBERS ON SITE, AS WELL AS THE TOTAL NUMBER OF HOURS EACH STAFF MEMBER WAS AT THE PROJECT SITE. THE TOTAL NUMBER OF REGULAR AND OVERTIME HOURS WILL BE ENTERED IN THE REG. HOURS COLUMN. ALL OTHER FIELDS SHOULD BE LEFT BLANK.

USERS NOT DESIGNATED BY THE PROJECT SUPERVISOR SHOULD NOT COMPLETE THIS PANEL.



Exercise 6

In this exercise, add daily staff to a DWR.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector [INSPST]**
Keys **TRN352 (contract); 10/11/14 (DWR)**

1. On the Daily Work Reports window, click the **Daily Staff** tab. The system displays the Daily Staff panel.

Record a staff member on site today.

2. Click the **New** button. The system inserts a blank row.
3. In the **Staff Member** dropdown list, select **Alber, Jane**.
4. In the **Reg. Hours** field, type **7.5**.

Record another staff member on site today.

5. Click the **New** button. The system inserts a blank row.
6. In the **Staff Member** dropdown list, select **Litte, Janice**.
7. In the **Reg. Hours** field, type **7.5**.
8. **Save**.

You've completed the Daily Staff panel.

Selecting and Recording Work Items

View and add daily usage data for installed work items on the Work Items panel. Before entering work item data, the contractor responsible for the work item must be entered on the Contractors panel. When the user first clicks the Work Items tab, the Select Work Item list is displayed. The *Record Work Item* and *Selects Work Item* buttons let the user toggle between two different versions of the Work Items panel. To enter usage data, the user first selects the work item and then selects the *Record Work Item* button (or the Record Work Item option on the Edit menu). This displays the Record Work Items panel on which the user can view and add daily usage data.

MUST RECORD
CONTRACTOR
FIRST.



Figure 7. Record Work Item and Selects Work Item Buttons - Detail

The user can toggle between two different versions of the Work Items panel. When the user first clicks the Work Items tab, or when the Selects Work Item button is clicked, the Select Work Items panel lists Work Items for the selected contract. The work items are listed in ascending order by project number then item code. The user can find, filter, and sort the list. If an item has installed quantities for the selected DWR, the Installed (Instld) check box is selected (ON).

Instld	Project Number	Line Item Number	Proposal Line Number	Category Number	Category Description	Item Code	Description
<input type="checkbox"/>	67004-3213-14-0010		0010	0100	ROADWAY	105-01	CONSTRUCTION STAKES, LINES AND
<input type="checkbox"/>	67004-3213-14-0020		0020	0100	ROADWAY	109-10.01	TRAINEE
<input checked="" type="checkbox"/>	67004-3213-14-0030		0030	0100	ROADWAY	201-01	CLEARING AND GRUBBING
<input type="checkbox"/>	67004-3213-14-0040		0040	0100	ROADWAY	202-01	REMOVAL OF STRUCTURES AND C
<input type="checkbox"/>	67004-3213-14-0050		0050	0100	ROADWAY	202-02.01	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0060		0060	0100	ROADWAY	202-02.02	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0070		0070	0100	ROADWAY	202-02.03	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0080		0080	0100	ROADWAY	202-02.04	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0090		0090	0100	ROADWAY	202-02.05	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0100		0100	0100	ROADWAY	202-02.06	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0110		0110	0100	ROADWAY	202-02.07	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0120		0120	0100	ROADWAY	202-02.08	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0130		0130	0100	ROADWAY	202-02.09	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0140		0140	0100	ROADWAY	202-02.10	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0150		0150	0100	ROADWAY	202-02.11	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0160		0160	0100	ROADWAY	202-02.12	REMOVAL OF PIPE (SIZE ,STA.)
<input type="checkbox"/>	67004-3213-14-0170		0170	0100	ROADWAY	202-03.01	REMOVAL OF ASPHALT PAVEMENT

Figure 8. Daily Work Reports Window - Work Items Panel (Selecting)

Clicking the Record Work Item button displays the Work Items window with usage information on the selected item for the DWR. View existing data for the work item or add new usage data on the Work Items panel.

TDOT DOES NOT USE THE AS BUILT QTY FIELD.

Figure 9. Daily Work Reports Window - Work Items Panel (Recording)

The Work Items panel displays the following Item information:

- **Qty Reported to Date** – Total quantity reported on DWRs. However, while working in standalone this quantity may appear to be doubled (known issue). The correct quantity appears on the server.
- **Qty Authorized to Date** – Total quantity reported on DWRs that were authorized in diaries.
- **Units Type** - The unit of measure for the pay item.
- **Qty Installed to Date** – Total quantity reported on DWRs that were authorized in diaries and included in approved and pending estimates.
- **Qty Paid to Date** – Total quantity reported on DWRs that were authorized in diaries and included in an estimate of any status. This value will always be the same as the Qty Installed to Date for TDOT when all estimates are approved.
- **Current Contract Qty** - Current contract quantity of the contract line item including any change orders. Current quantity is calculated by the sum of bid quantity and the net change order quantity.

On the Work Items (Selecting) panel, it is important to choose the correct item especially when a contract has multiple projects and/or categories which can contain duplicate items. The following table defines categories per items.

Item Types	Participating Categories	Non-Participating Categories
Roadway Items	0100	0110 - 0190
Box Bridge Items	0300	0310 - 0390
Bridge Items	0500	0510 – 0590
Maintenance Items	0700	0710 – 0790
Utility Items	0900	0910 – 0990
Alternate Bid Items	≥ 1000	

Table 1. TDOT Categories

In addition to separating items by type of work, categories are used to control funding.

- Participating Categories are used the majority of the time and are paid by normal funding sources.
- Non-Participating Categories are typically used when a local entity agrees to pay for all or a portion of the cost of an item. Normally, but not always, non-participating costs are associated with Utility Categories.

Find descriptions of funding sources on the Contract Funding window (see Main Panel > Contract Administration > Contract Records > Contract Funding). If there are any questions regarding funding, please contact the Headquarters Finance Office.

On the Work Items panel (in Recording view), the following three fields are required for each Loc Seq Nbr (Location Sequence Number).

- **Placed Qty** – If not editable, the item requires a DWR template. See the following section for details.
- **Contractor** – Select the prime contractor or any subcontractor approved to perform work on the bid item. If more than one contractor performs work on the same bid item, select the contractor performing the majority of the work. Record work performed on non-bid items (Add-On Items and Change Order Items) against the prime contractor regardless of who is performing the work. Identify these items by a Bid Qty of zero and a line item number that ranges from 9000-9499 (Add-On Items) and 9500-9999 (Change Order Items).
- **Location** – In addition to the required Location field, use the Station fields when appropriate.



Exercise 7

In this exercise, record the details of a work item for the Prime Contractor for a DWR.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector [INSPST]**
Keys **TRN352 (contract); 10/11/14 (DWR)**

1. Click the **Work Items** tab. The system displays the Work Items panel.
2. Scroll to and select the following:

Project Nbr **67004-3213-14**, Line Item Number **0030**,
Category Number **0100**, Item Code **201-01**,
Description **CLEARING AND GRUBBING**.
3. Click the **Record Work Item** button. The system displays the info on the Work Items panel.

Enter the information about the work item.

4. Click the **New** button.
5. In the **Placed Qty** field, type **0.20**
6. In the **Contractor** dropdown list, select **Highways, Inc.**
7. In the **Location** field, type **Grey Road**.
8. **Save**.

Prepare to record the next item.

9. To return to the contract item list, click the **Selects Work Item** button.

You've recorded a work item.

Selecting and Recording to a DWR Template

DWR Templates are used to record contract activity data that cannot be entered on standard SiteManager panels. DWR templates can also calculate values for work items and those values can be returned to populate the Placed Qty field of the Daily Work Report. If an item has an associated template for the contract that returns a value, then the Placed Qty field can only be populated by that return value and recording data to DWR templates. The list of DWR templates available for the item may be accessed with the DWR template button.

Any DWR templates associated to the selected item are available from the DWR Template window for viewing or entering data. The DWR Template window is accessed with the DWR Template button. If the item requires the use of a template, the DWR Template window automatically displays when the work item location and contractor data is saved.

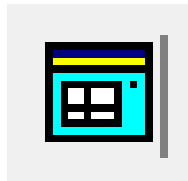
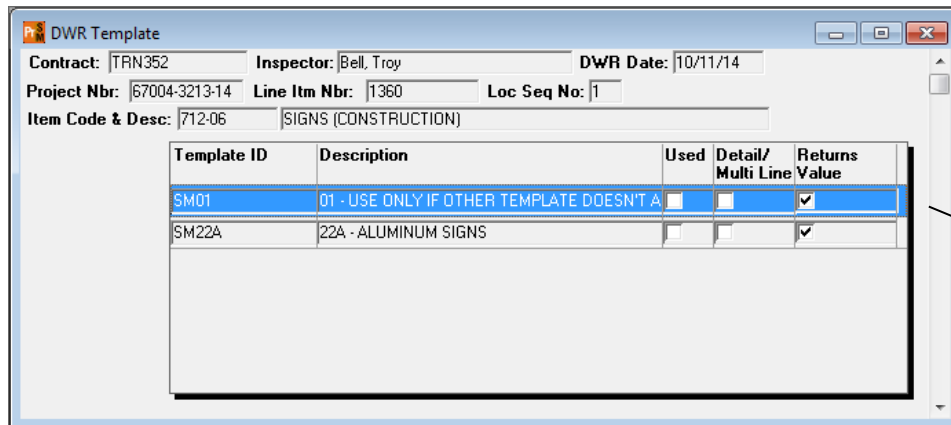


Figure 10. DWR Template Button

The DWR Templates window displays a list of the DWR Templates available for use with this work item. The user chooses which DWR template associated to the selected item to view or record data to. Once the DWR template has been chosen the user can enter data into the template.



TEMPLATE SM01 IS A GENERIC TEMPLATE AND SHOULD ONLY BE USED WHEN IT IS NOT POSSIBLE TO RECORD DATA ON THE TEMPLATE DESIGNED FOR THE ITEM OF WORK BEING PERFORMED.

Figure 11. DWR Template Window

Figure 12. DWR Template (SM22A) - Detail



Exercise 8

In this exercise, use a DWR template to record a placed quantity to a DWR.

User ID **jj00004** Password **pass**
 Connection **Standalone**
 Group Name **FIELD - Operations Inspector [INSPST]**
 Keys **TRN352 (contract); 10/11/14 (DWR)**

Locate the work item.

1. Scroll to and select the following:

Project Nbr **67004-3213-14**, Line Item Number **1360**,
 Category Number **0100**, Item Code **712-06**,
 Description **SIGNS (CONSTRUCTION)**.

Record information about the work item.

2. Click the **Record Work Item** button. The system displays the info on the **Work Items** panel.
3. Click the **New** button.
4. Why is the **Placed Qty** field gray and un-editable for this item?

5. In the **Contractor** dropdown list, select **Floyd & Floyd Contractors**.
6. In the **Location** field, type **S.R. 85 at the West Fork Obey River**.
7. **Save**. The system displays the DWR Template window.
8. What is the title of the window that displayed when the save button was clicked? _____

Complete the DWR template.

9. In the **Description** column, double-click **22A - Aluminum Signs**.
10. In the **Sign Schedule** field, type **12B**.
11. In the **Legend** field, type **General Robert R Neyland Bridge**.
12. In the **Size** field, type **24" x 60"**.
13. In the **Area of Each Sign** field, type **10.00**.
14. In the **# of Signs** field, type **4**.
15. What is displayed in the **Pay Quantity** field? _____
16. In the **Location 1** field, type **S.R. 85 SB @ L.M. 17.85**.
17. In the **Location 2** field, type **S.R. 85 NB @ L.M. 18.10**.
18. **Save**.
19. **Close**. The system displays the Daily Work Reports window.
20. **Save**.

NOTE

IN THE SIGN SCHEDULE FIELD, USE THE SIGN SCHEDULE NUMBER FROM THE PLANS IF AVAILABLE. IF THERE IS NO SIGN SCHEDULE IN THE PLANS, THE MUTCD SIGN LABEL MAY BE USED.

You've completed a DWR template associated to a work item.

Additional Examples of DWR Templates

TDOT has developed several DWR templates like the forms currently used for calculating and recording item quantities.

Examples follow:

Pile Penetration (ft)	Penetration (in) to	Below P.C.O. (ft)	Below P.C.O. (in)	Refusal?	Hammer Type	Hammer Weight, W (lbs)	Hammer Stroke, H (ft)	Area of
Ex: 10	6	11	0					
0	0	24	0	<input type="radio"/> Yes <input checked="" type="radio"/> No	P+H/Pre-Drilled P+H			
24	0	25	0	<input type="radio"/> Yes <input checked="" type="radio"/> No	Single Action	3800.000	7.500	

Figure 13. DWR Template (SM05) - Detail

WHEN THE CONTRACT TYPE IS MAINTENANCE, TEMPLATE MMS02 IS REQUIRED WHICH INDICATES THE COUNTY AND SYSTEM THAT THIS WORK WAS PERFORMED. THIS MUST BE DONE FOR EACH LOCATION SEQUENCE ENTRY.

Figure 14. DWR Template (MMS02) - Detail

Previewing a DWR

Use the built-in Preview DWR functionality to view a DWR in a printable format.



Figure 15. Preview DWR Button

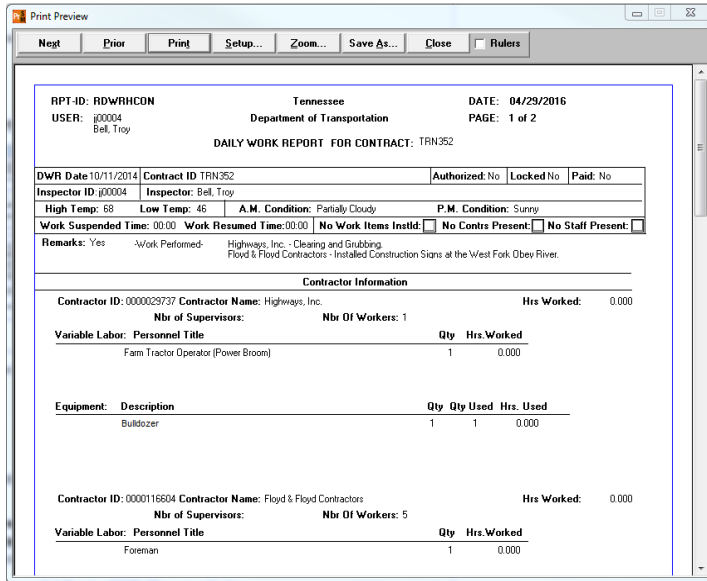


Figure 16. Print Preview Window (after clicking Preview DWR button)



Exercise 9

In this exercise, preview a DWR.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector [INSPST]**
Keys **TRN352 (contract); 10/11/14 (DWR)**

1. On the **Services** menu, click **Preview DWR**. The system displays the Print Preview window for the DWR.
2. To preview the DWR in a printable format, click the **Next** and **Prior** buttons and use the scroll bar to move from page to page.
3. **Close**. The system displays the Daily Work Reports window.

You've previewed a DWR.



Exercise 10

In this exercise, record the details of a work item for the prime contractor for a DWR.

User ID	jj00004	Password	pass
Connection	Standalone		
Group Name	FIELD - Operations Inspector [INSPST]		
Keys	TRN352 (contract); 10/11/14 (DWR)		
Scenario	Open a DWR that was created earlier in the day, but was not finished.		

Open an existing DWR.

1. On the **Daily Work Reports** window, click the **DWR Info** tab. The system displays the DWR Info panel and makes the Open button available.
2. Click the **Open** button. The system displays the Contract ID window.
3. In the **Inspector** area, in the **Inspector Name** column, double-click **Bell, Troy**.
4. In the **Date** area, in the **DWR Date** column, double-click **10/09/14**. The system displays the Daily Work Reports window.
5. Review the details on the **DWR Info** panel.

Add a remark.

6. In the **Remarks Type** list box, scroll to and click **Visitor**.
7. In the **Remarks** text box, type **TDOT's Chief Engineer visited job site**.
8. **Save**.

Review some more of the information on this DWR.

9. Click the **Contractors** tab.
10. Was the prime contractor on-site?

11. Click the **Contractor Equip.** tab.
12. How many pieces of equipment are listed on this DWR?

13. Click the **Daily Staff** tab.
14. How many agency staff members were on site? _____
15. **Exit SiteManager.**

You've opened an existing DWR and added remarks.



Exercise 11

In this exercise, record the quantity for a ticketed item and select the Producer/Supplier who supplied the aggregate.

User ID	jj00002	Password	pass
Connection	Server		
Group Name	FIELD - Operations Office Staff [OSTAFF]		
Keys	Not applicable		
Scenario	Office staff will create a DWR to record quantity for ticketed item.		

NOTE

SWITCH TO SERVER FOR THIS EXERCISE.

1. Start and log onto SiteManager as user **jj00002** *while connected in server mode.*
2. On the **Main Panel**, double-click the **Daily Work Reports** icon.
3. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
4. While on the **DWR Info.** panel, click the **Services** menu.
5. Click the **Choose Keys** choice.
6. In the **Contract ID** column, scroll to and double-click **TRN352**.
7. In the **DWR Date** field, type **101214**.

Add a remark about the work performed.

8. In the **Remarks Type** list box, scroll to and select **-Work Performed-**.
9. In the **Remarks** text box, type **Office Staff Documentation for Ticketed Items**.
10. **Save.**

Record the contractor on site today.

11. Click the **Contractors** tab. The system displays the Contractors panel.
12. Click in the **Contractor** pane, then click the **New** button. The system inserts a blank row.
13. In the **Contractor** dropdown list, click **Highways, Inc. ** PRIME ****
14. **Save.**

Record work items.

15. Click the **Work Items** tab. The system displays the Work Items panel.
16. Scroll to and select the following:

Project Nbr **67004-3213-14**, Line Item Number **0630**,
Category Number **0100**, Item Code **303-01**,
Description **MINERAL AGGREGATE, TYPE A BASE, GRADING D.**
17. Click the **Record Work Item** button. SiteManager displays the info on the Work Items panel.

Enter the information about that work item.

18. Click the **New** button.
19. In the **Contractor** dropdown list, select **Highways, Inc.**
20. In the **Location** field, type **266+50 to 268+50.**
21. **Save.** The system displays the DWR Template window.

Complete the DWR template.

22. In the **Description** column, double-click **39 - TICKETED ITEMS**. The system displays the DWR template.

Figure 17. DWR Template – SM39 Window

23. In the **Report Number** field, type **1**.
24. In the **Ticket Bundle# (if applicable)** field, type **1**.
25. In the **Total Ticketed Tons (Pay Qty)** field, type **1200.0**.
26. In the **Material Code** dropdown list, select **303.01.001 Base (Mineral Aggregate, Type A)**. The template displays the description only.
27. In the **Producer Supplier** dropdown list, select **Dunlap Stone – Dunlap Aggregate**.
28. **Save**.
29. **Close**. The system displays the Daily Work Reports window.
30. **Save**.
31. **Exit SiteManager**.

You've created a DWR on the server.

Summary

To access the Daily Work Report window:

1. On the **SiteManager** main panel, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.

To enter basic DWR information:

1. On the **SiteManager** main panel, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
3. Open an existing unauthorized, unlocked DWR created by you or create a new DWR.
4. In the **High Temperature** field, click the spin button to advance to or type the correct temperature.
5. In the **Low Temperature** field, click the spin button to advance to or type the correct temperature.
6. In the **A.M.** field, type the prevailing weather conditions for the A.M. hours of the work period.
7. In the **P.M.** field, type the prevailing weather condition for the P.M. hours of the work period.
8. To enter a remark, in the **Remark Type** list box, scroll to and click the desired remark type. Then type the remark in the **Remarks** field.
9. **Save.**

To enter Contractor activity:

1. On the **SiteManager** main panel, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
3. Open an existing unauthorized, unlocked DWR created by you or create a new DWR.
4. Enter or modify basic DWR Info.
5. **Save**.
6. Click the **Contractors** tab.
7. Modify the Contractor data appropriately.
8. **Save**.

To add a personnel type to a Daily Work Report:

1. On the **SiteManager** main panel, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
3. Open an existing unauthorized, unlocked DWR created by you or create a new DWR.
4. Enter or modify basic DWR Info.
5. **Save**.
6. Click the **Contractors** tab.
7. If there is more than one Contractor listed, click the **Contractor** who employs the worker.
8. Click the **Personnel Type** field and click the **New** button. An empty row is added to the list.
9. In the **Personnel Type** dropdown list, select the desired personnel type.
10. In the **Nbr of Persons** field, type the number of workers of this Personnel Type who worked on this date.
11. **Save**.

To add equipment to a Daily Work Report:

1. On the **SiteManager** main panel, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
3. Open an existing unauthorized, unlocked DWR created by you or create a new DWR.
4. Enter or modify basic DWR Info.
5. **Save.**
6. Click the **Contractors** tab.
7. Add the contractor who supplied the equipment.
8. **Save.**
9. Click the **Contractor Equipment** tab.
10. If there is more than one Contractor listed, click the Contractor who supplied the equipment.
11. Click the **Equipment ID** field and click the **New** button. An empty row is added to the list.
12. In the **Equipment ID** dropdown list, select the desired equipment ID.
13. In the **Nbr of Pieces** field, type the number of pieces of this equipment present on this date.
14. In the **Nbr Used** field, type the number of pieces of this equipment used on this date.
15. **Save.**

To add Daily Staff to a Daily Work Report.

1. On the **SiteManager** main panel, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
3. Open an existing unauthorized, unlocked DWR created by you or create a new DWR.
4. Click the **Daily Staff** tab.
5. Click the **New** button on the toolbar.
6. In the **Staff Member** dropdown box, click the name of the staff member you want to add.
7. In the **Reg. Hours** field, type the number of hours the staff member worked.
8. **Save.**

To select and record a work item:

1. On the **SiteManager** main panel, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
3. Open an existing unauthorized, unlocked DWR created by you or create a new DWR.
4. Enter or modify basic DWR Info.
5. **Save.**
6. Click the **Contractors** tab.
7. Add the contractor who installed the work item(s).
8. **Save.**
9. Click the **Work Items** tab.
10. In the **Work Item** list box, scroll to and click the work item whose installation needs to be recorded.
11. Click the **Record Work Item** button.
12. Click the **Location Installed** field and click the **New** button. An empty row is inserted on the Record Work Item List.

13. In the **Placed Qty** field, type the quantity of the item installed at this location.
14. In the **Plan Page Nbr** field, type the page number of a reference to the installed item.
15. In the **Contractor** dropdown list, select the name of the Contractor responsible for the installed item.
16. In the **Location** field, type the location where the item was installed.
17. In the **From Station** field, type the Station ID that identifies where the installation of this Work Item starts.
18. In the **From Station Offset** field, type the offset from the Station ID that identifies where the installation of this Work Item starts.
19. In the **From Station Distance** field, type the offset distance from the Station ID that identifies where the installation of this Work Item starts.
20. In the **To Station** field, type the Station ID that identifies where the installation of this Work Item ends.
21. In the **To Station Offset** field, type the offset from the Station ID that identifies where the installation of this Work Item ends.
22. In the **To Station Distance** field, type the offset distance from the Station ID that identifies where the installation of this Work Item ends.
23. **Save.**
24. Repeat steps 12-31 for additional locations where the work item was installed on this workday.
25. When complete, click the **Select Work Item** button to select additional items for recording or return to the current DWR.

To record work item data to DWR templates:

1. To invoke the DWR Template window click on the **DWR Template** button or select **Edit/View Work Item Template Data** from the **Services** menu.
2. The DWR Template ID window displays the templates available for use with the selected work item. Choose a DWR template to record data to and click the **Record Template Data** button or choose **Record Template Data** from the **Services** menu. The DWR template is displayed.
3. Enter the appropriate data into the fields of the DWR template.
4. When the data is fully entered into the template, **Save**.
5. To return to the Work Item panel, **Close**. The **Placed Qty** field is now populated with the value from the DWR template and the **Templ Used** box is checked.

KEY TO RECORDING
DWR DATA IS
ACCURACY. THE
PLACED QUANTITY
RECORDED IN A
DWR IS THE
QUANTITY THAT
WILL BE PAID ON AN
ESTIMATE,
BARRING ANY TEST
REPORT OR OTHER
ADJUSTMENTS.

“GARBAGE IN =
GARBAGE OUT”

CAUTION!

YOU MUST CLICK
SAVE TO UPDATE
THE QUANTITY
REPORTED TO DATE
FIELD.

Review Exercise

In this exercise, create another DWR for the current contract.

User ID **jj00004** Password **pass**
 Connection **Standalone**
 Group Name **FIELD - Operations Inspector [INSPST]**
 Keys **Not Applicable**

NOTE
 SWITCH TO
 STANDALONE FOR THIS
 EXERCISE.

1. Start and log on to SiteManager as **jj00004** *while connected to the standalone.*
2. Create a DWR for **October 16, 2014** for contract **TRN352** using the following information:

Weather conditions:

High	70 degrees
Low	49 degrees
AM	Partially Cloudy
PM	Partially Cloudy

Remarks:

Work Performed	Highways, Inc. installed 18" RCP at station 16+75 RT Centerline.
-----------------------	-------------------------------------------------------------------------

Contractor:

Highways, Inc.

Personnel:

Foreman	1
Class "B" Operators	2
Class "D" Operators	1
Truck Driver (3/4 axles)	2

Equipment (on site and used):

Backhoe	1
Pickup Truck	3
Bulldozer	1
Bobcat	1
Haul Truck	2

Daily Staff:

Baum, Paul	7.5 hours
Harris, Ellen	7.5 hours

Items:

**Item Code 611-07.01, CLASS A CONCRETE (PIPE ENDWALLS)
(Project 67004-3213-14, Line Item Nbr 1020, Category Number 0100):**

Plan Page Nbr	4A
Contractor	Highways, Inc.
Location	Station 16+75 RT Centerline
Template	SM15
As shown on plans	Yes
Station (if no Code)	10 + 50
Pay Quantity	9.6 cubic yards

**Item Code 607-03.30, 18" PIPE CULVERT
(Project 67004-3213-14, Line Item Nbr 0870, Category Number 0100):**

Placed Quantity	50
Contractor	Highways, Inc.
Location	Station 16+75 RT Centerline

3. Exit SiteManager.

Creating Daily Work Reports for Field and Office Documentation (Part 2)

In this chapter, you will receive instruction about the following:

- Copying a Daily Work Report 2
- Modifying a Copied Daily Work Report 4
- Creating and Using Attachments 14
- Summary 19
- Review Exercise 21

Copying a Daily Work Report

After creating the first Daily Work Report (DWR) for a new contract, it is easier to copy an existing DWR rather than creating a new one from scratch. A copied DWR copies the following data to a new DWR.

- Contractor
- Personnel (Including number of persons)
- Equipment (Including number of pieces and number used)
- Daily Staff (Including hours)

A copied DWR will not include the following data from the original DWR:

- Basic DWR Info
- Installed Work Items and Templates

To copy a DWR, simply change the date on any existing DWR. This prompts the user to confirm the desire to copy the contractor data to the new DWR date. Use the calendar to indicate the new DWR date, or type the new date over the existing date in the DWR Date field.

Tip! The user copying a DWR must have created the DWR.

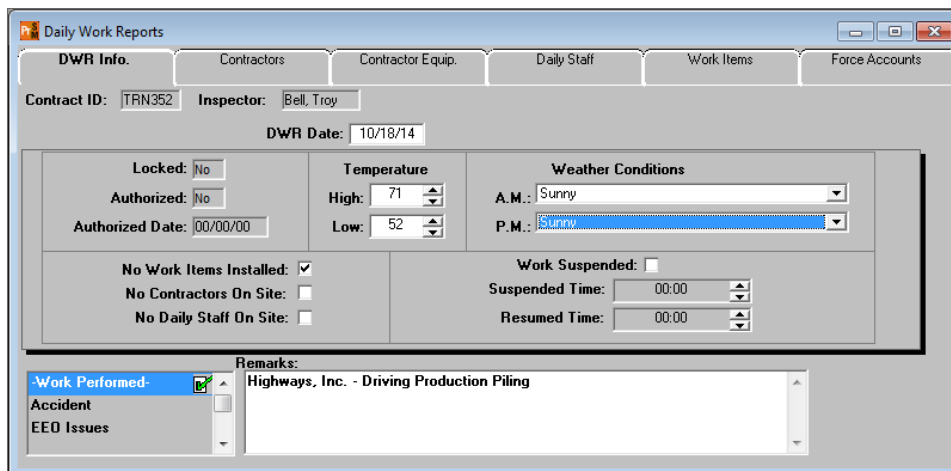


Figure 1. Daily Work Reports Window - DWR Info Panel

THE FOLLOWING MUST BE ENTERED ON THE DWR INFO PANEL ON A COPIED DWR:

DATE, TEMPERATURE, WEATHER CONDITIONS, WORK PERFORMED REMARKS INCLUDING CONTRACTOR NAME, APPROPRIATE REMARKS



Exercise 1

In this exercise, copy an existing DWR to create a new DWR on a contract.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector (INSPST)**

1. Start and log onto SiteManager as user **jj00004** *while connected in standalone mode.*

First, open the DWR to copy.

2. On the **Main Panel** panel, double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports panel.
3. Double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports window.
4. Click the **Open** button. The system displays the Contract ID window.
5. In the **Contract ID** area, in the **Contract ID** column, double-click **TRN352**.
6. In the **Inspector** area, double-click **jj00004**.
7. In the **Date** area, in the **DWR Date** column, scroll to and double-click **10/17/14**. The system displays the Daily Work Reports window.

USERS MAY
ALSO USE
THE
CALENDAR TO
PICK A DATE.

Copy the contractor information from the open DWR to a new DWR for a specified date.

8. In the **DWR Date** field, type **101814**.
9. On the keyboard, press the **Tab** key. The system displays a message prompting you to confirm your desire to copy the contractor information.
10. In the message, click the **Yes** button.
11. **Save**.

You've copied a DWR.

STRESS THIS!

TO BE PROMPTED TO COPY CONTRACTOR INFO, AFTER TYPING OR CHOOSING THE NEW DATE, TAB OUT OF THE DWR DATE FIELD, SAVE OR CLICK INTO ANOTHER FIELD.

Modifying a Copied Daily Work Report

After copying a DWR, add the basic DWR information about weather and remarks. Then, modify the contractors, and personnel types, equipment, and daily staff on the new DWR to reflect the activities of the day.

Contractors Panel

Modify the contractors (prime and sub), personnel types and the number of workers on the Contractors panel.

NBR OF WORKERS FIELD IS AUTO POPULATED – DO NOT ENTER DATA.

Figure 2. Daily Work Reports Window - Contractors Panel



Exercise 2

In this exercise, modify the weather conditions, remarks, contractors, supervisors, and personnel types for a copied DWR.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector (INSPST)**
Prior Keys **TRN352** (contract); **jj00004** (user ID); **10/18/14** (DWR date)

Enter the temperatures and conditions for today.

1. In the **High Temperature** field, type **71**.
2. In the **Low Temperature** field, type **52**.
3. In the **A.M.** dropdown list, select **Sunny**.
4. In the **P.M.** dropdown list, select **Sunny**.

USERS ARE
MODIFYING THE
NUMBER OF
LABORERS ON
THE DWR.

Enter a remark about the work performed.

5. In the **Remarks Type** list box, select **-Work Performed-**.
6. In the **Work Performed** text box, type **Highways, Inc. - Driving Production Piling**.
7. **Save**.

Record the personnel on site.

8. Click the **Contractors** tab. The system displays the Contractors panel.
9. In the **Contractor** pane, in the **Contractor** column, select **Highways, Inc.**
10. In the **Personnel Type** pane, select **Class "B" Operators**.
11. In the **Nbr of Persons** field, type **1** (overwriting the 2).
12. **Save**.

Record a subcontractor.

13. Click the **Contractor** area.
14. Click the **New** button. The system inserts a blank row.
15. In the **Contractor** dropdown list, select **Floyd & Floyd Contractors**.
16. **Save**.

Add a personnel type for that subcontractor.

17. Click the **Personnel Type** area.
18. Click the **New** button. The system inserts a blank row.
19. In the **Personnel Type** dropdown list, select **Class “D” Operator**.
20. In the **Nbr of Persons** field, type **1**.

Add a second personnel type for that subcontractor.

21. Click the **New** button. The system inserts a blank row.
22. In the **Personnel Type** dropdown list, select **Foreman**.
23. In the **Nbr of Persons** field, type **1**.

Add a third personnel type for that subcontractor.

24. Click the **New** button. The system inserts a blank row.
25. In the **Personnel Type** dropdown list, select **Unskilled Laborer**.
26. In the **Nbr of Persons** field, type **4**.

Add a fourth personnel type for that subcontractor.

27. Click the **New** button. The system inserts a blank row.
28. In the **Personnel Type** dropdown list, select **Truck Driver**.
29. In the **Nbr of Persons** field, type **1**.
30. **Save**.

You've modified the contractors, supervisors, and personnel types for a copied DWR.

Contractor Equip Panel

Modify contractor's equipment, number of pieces and the number of pieces used on the Contractor Equip panel.

Contractor	Nbr of Supervisors	Nbr of Workers	Contractor Hrs Worked
0000029737 Highways, Inc. ** PRIME **		6	.000
0000116604 Floyd & Floyd Contractors		7	.000

Equipment ID - Description	Nbr. of Pieces	Nbr Used	Hours Used
BCKH Backhoe	1	0	0.000
BOBC Bobcat	1	0	0.000
HAUL Haul Truck	2	0	0.000
PICK Pickup Truck	3	0	0.000

Figure 3. Daily Work Reports Window - Contractor Equip Panel



Exercise 3

In this exercise, modify a contractor's equipment list for a copied DWR.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector (INSPST)**
Prior Keys **TRN352** (contract); **jj00004** (user ID); **10/18/14** (DWR date)

1. Click the **Contractor Equip** tab. The system displays the Contractor Equip panel.
2. In the **Contractor** pane, in the **Contractor** column, select **Floyd & Floyd Contractors**.
3. Click in the **Equipment ID-Description** area.

Add an equipment type for that subcontractor.

4. Click the **New** button. The system inserts a blank row.
5. In the **Equipment ID-Description** dropdown list, select **Pickup Truck**.

6. In the **Nbr of Pieces** field, type **2**.
7. In the **Nbr Used** field, type **2**.
8. **Save**.

Delete an equipment type for the Prime Contractor.

9. In the **Contractor** pane, in the **Contractor** column, select **Highways, Inc.**
10. In the **Equipment ID - Description** pane, in the **Equipment ID - Description** column, select **Bulldozer**.
11. Click the **Delete** button. The system displays a message prompting you to confirm the decision to delete.
12. In the message, click **Yes**.
13. **Save**.

You've modified a contractor's equipment list for a copied DWR.

Daily Staff Panel

Modify the daily staff and the hours on site on the Daily Staff panel.

Staff Member	S/C	Work Code	Reg. Hours	OT Hours	Vehicle ID	Starting Mileage	Ending Mileage
Harris, Ellen	S		9.000	000			

Figure 4. Daily Work Reports Window - Daily Staff Panel



Exercise 4

In this exercise, modify the daily staff for a copied DWR.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector (INSPST)**
Prior Keys **TRN352** (contract); **jj00004** (user ID); **10/18/14** (DWR date)

1. On the **Daily Work Reports** window, click the **Daily Staff** tab. The system displays the Daily Staff panel.

Delete a staff member's name who was not on site today.

2. In the **Staff Member** column, select **Baum, Paul**.
3. On the toolbar, click the **Delete** button. The system displays a message prompting you to confirm the decision to delete.
4. In the message, click **Yes**.

Now, modify the hours for the daily staff.

5. In the **Staff Member** column, select **Harris, Ellen**.
6. In the **Reg Hours** field, type **9** (overwriting 7.5).
7. **Save**.

You've modified the daily staff for a copied DWR.

Work Items Panel

Work item details do not copy from one DWR to another, so users must record them on the Work Items panel for the new DWR.

Daily Work Reports

DWR Info: Contract ID: TRN352 Inspector: Bell, Troy Date: 10/18/14

Contractors: Contractor Equip.: Daily Staff: **Work Items**: Force Accounts:

Contract ID: TRN352 Inspector: Bell, Troy Date: 10/18/14

Project Nbr: 67004-3213-14 Line Itm Nbr: 9500 Prpsl Line Nbr: 9500 Item Code: 606-09.03 Category Nbr: 0100

Item Desc: PRECAST CONCRETE PILES (SIZE 1) Unit Price: \$30.00000

Supp Desc 1: Supp Desc 2:

Qty Reported to Date: 29.000 Qty Authorized to Date: 0.000 Units Type: L.F.

Qty Installed to Date: .000 Bid Qty: 0.000 Pay To Plan Qty:

Status: Active Qty Paid to Date: .000 Current Contract Qty: 500.000

Loc Seq Nbr	Location Installed	Placed Qty.	Plan Page Number	Templ Used
1	Bent 2 10+90 Column A, Footing D	29.000	9	<input checked="" type="checkbox"/>

Placed Qty: 29.000 Plan Page Nbr: 9 Contractor: Highways, Inc. ** PRIME **

As Built Qty: .000 Loc Seq Nbr: 1 Location: Bent 2 10+90 Column A, Footing D

Station Offset Distance Station Offset Distance

From: + .000 To: .000

Measured Indicator: Y N

Material Inspection Detail

Material Component	Cont Est Matr Qty	Satisf Repr Matr Qty	Reprt Matr Qty	Matr Unit
T2 Piling	500.000	0.000	0.000	Various

DO NOT USE THE 'AS BUILT QTY' FIELD.

Figure 5. Daily Work Reports Window - Work Items Panel (Template Used)

DWR Template - SM07

Contract: TRN352 Inspector: Bell, Troy DWR Date: 10/18/14

Project Nbr: 67004-3213-14 Line Itm Nbr: 9500 Loc Seq No: 1

Item Code & Desc: 606-09.03 PRECAST CONCRETE PILES (SIZE 1)

STRUCTURE INFORMATION

Structure Type: Bridge Bridge Number: 1

Substructure Type: Bent Bent Number: 2 Footing:

Location: Bridge 1 - Bent 2 Station/Position: 10+90 Column A, Footing D

PILE INFORMATION

Total Pay Quantity: 29.0 Length Set: 35.000 Required Bearing: 90.000

Pile Number	Initial Length (ft)	Added Length (ft)	Pile Stripped for Siesmic? (-2')	Cut-Off (ft)	In Place Length	Pay Quantity	Refusal?		Pile Last
1	35.0	.0	<input checked="" type="radio"/> Yes <input type="radio"/> No	4.0	29.0	29.0	<input checked="" type="radio"/> Yes <input type="radio"/> No	1	2

Figure 6. DWR Template Window (SM07)

Figure 7. Daily Work Reports Window - Work Items Panel (No Template Used)



Exercise 5

In this exercise, record work item details for a copied DWR.

User ID **jj00004** Password **pass**
 Connection **Standalone**
 Group Name **FIELD - Operations Inspector (INSPST)**
 Prior Keys **TRN352 (contract); jj00004 (user ID); 10/18/14 (DWR date)**
 Scenario **Use a detailed multi-line template to record pile driving data and determine the placed quantity of an item.**

Record a work item.

1. Click the **Work Items** tab. The system displays the Work Items panel.
2. Scroll to and select the following:

Project Number **67004-3213-14**, Line Item Number **9500**,
 Category Number **0100**, Item Code **606-09.03**,
 Description **PRECAST CONCRETE PILES (SIZE 1)**.

3. On the toolbar, click the **Record Work Item** button.
4. Click **New**. The system displays fields to capture location and contractor information.

Record the details about the work item.

5. In the **Plan Page Nbr** field, type **9**.
6. In the **Contractor** dropdown list, select **Highways, Inc.**
7. In the **Location** field, type **Bent 2 10+90 Column A, Footing D**.
8. **Save**. The system displays the DWR Template window.

Choose a template.

9. In the **Description** column, select **07 CONCRETE PRODUCTION PILING (ENGLISH)**. The system displays the DWR Template window.
10. On the toolbar, click the **Record Template Data** button. The system displays the DWR Template – SM07 window.

Enter the structure data.

11. In the **Structure Type** dropdown list, select **Bridge**.
12. In the **Bridge Number** field, type **1**.
13. In the **Substructure Type** dropdown list, select **Bent**.
14. In the **Bent Number** field, type **2**.
15. Press **Tab**.
16. Note that the **Location** field is automatically populated.
17. In the **Station/Position** field, type **10+90 Column A, Footing D**.
18. In the **Length Set** field, type **35.0**.
19. In the **Required Bearing** field, type **90.0**.
20. **Save**.

REMAINING PORTION OF TEMPLATE EXERCISE IS IN DETAIL SECTION OF THE TEMPLATE. REMIND STUDENTS TO BE CAREFUL OF PLACE HOLDER ZEROS.

Enter the pile information.

21. In the **Pile Number** field, type **1**.
22. In the **Initial Length (ft)** field, type **35.0**.
23. In the **Pile Stripped for Seismic? (-2')** field, click **Yes**.

24. In the **Cut-Off (ft)** field, type **4.0**.
25. In the **Refusal?** field, click **Yes**.
26. **Save**.
27. What is the total pay quantity? _____
28. **Close**.

Review the results.

29. Note the **Placed Qty** field has been populated.
30. What was the total placed quantity? _____
31. **Save**.

Record another work item.

32. Click the **Selects Work Item** button. The system displays the Work Items panel.
33. Scroll to and select the following:

Project Number **67004-3213-14**, Line Item Number **1110**,
Category Number **0100**, Item Code **705-02.02**,
Description **Single Guardrail (Type 2)**
34. On the toolbar, click the **Record Work Item** button.
35. Click **New**. The system displays fields to capture location and contractor information.

Record the details about the work item.

36. In the **Placed Qty** field, type **1250**.
37. In the **Contractor** dropdown list, select **Highways, Inc**.
38. In the **Location** field, type **Left Centerline 15+00 to 27+50**.
39. **Save**.

You've recorded work item details on a copied DWR.

Creating and Using Attachments

The Attachment functionality of SiteManager allows URL links, Plug-In applications, and OLE attachments to be attached to certain SiteManager records.

Attachments are activated by clicking the attachment button, then double-clicking the attachment.

Creating an OLE Attachment

The Microsoft Windows Object Linking and Embedding standard (OLE) allows Windows programs like SiteManager to attach documents pertaining to the contract.

When you use the OLE functionality to create a new attachment, you are actually embedding the data and the connection to the application's functionality in the SiteManager database. Even though the OLE object is assigned a name, *the data does not actually exist as an external file on your network or workstation hard drive*. It only exists as a named object in the SiteManager database. Anyone with access to the record can access the embedded data *if the application that created the data is installed on their workstation*.

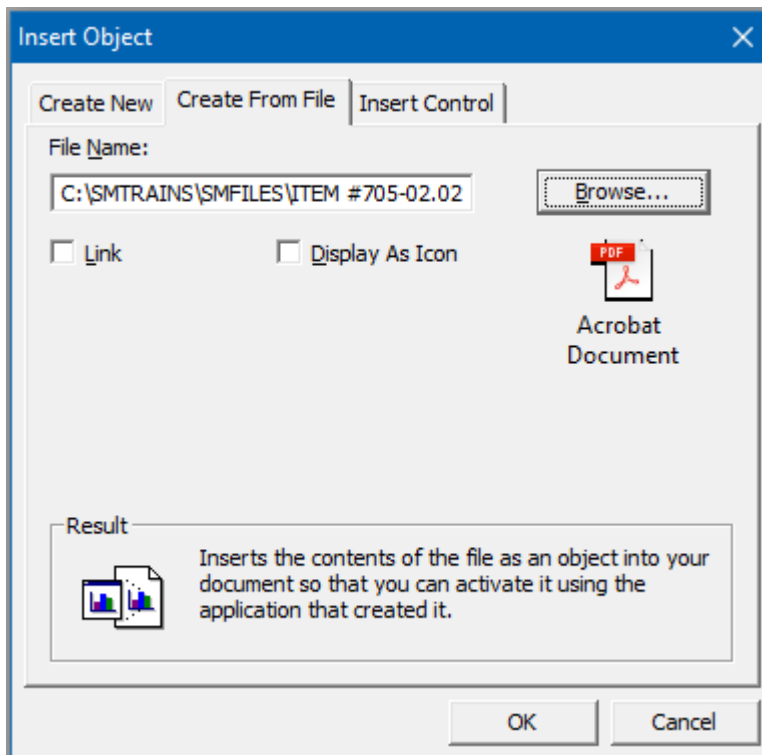


Figure 8. Insert Object Dialog Invoked by the New OLE button

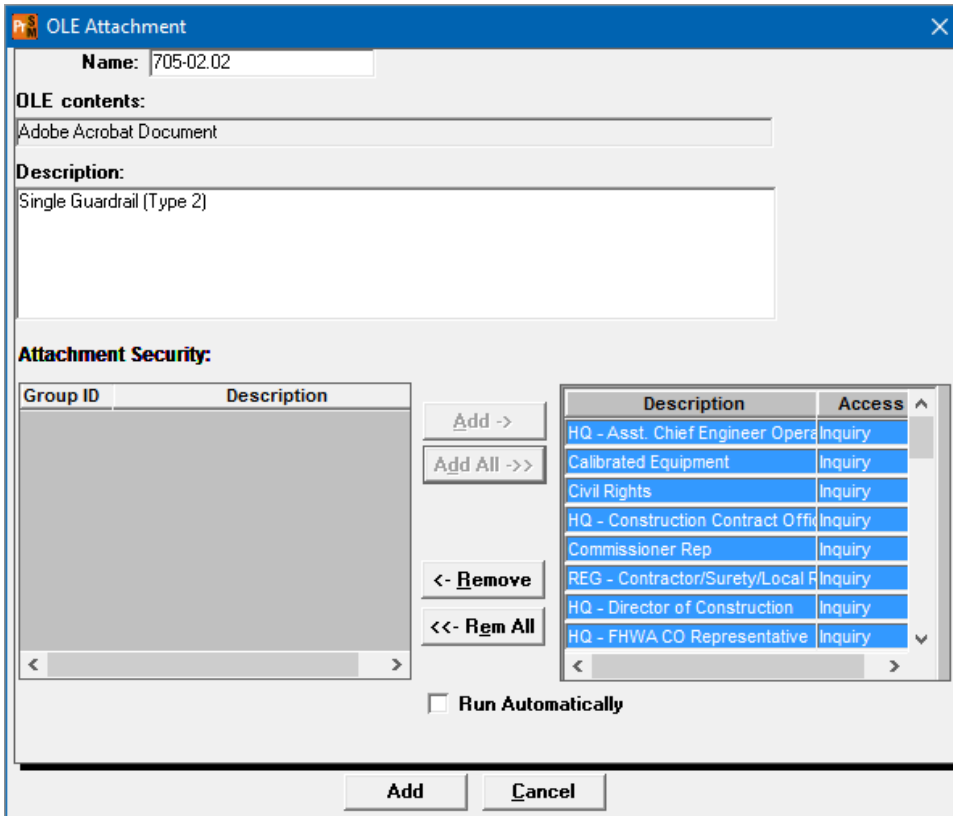


Figure 9. OLE Attachment Window

Name	Type	Description	Autorun
705-02.02	OLE	Single Guardrail (Type 2)	<input type="checkbox"/>

Figure 10. Daily Work Reports Window – Work Items Panel - Attachments Window

FIELD OFFICE STAFF AND INSPECTORS WILL USE THE OLE ATTACHMENT FUNCTION IN THE DWR WINDOW TO ATTACH AN EXCEL, WORD OR PDF DOCUMENT TO A RECORDED WORK ITEM. AN EXAMPLE WOULD BE WHEN WORK HAS BEGUN ON AN ITEM BEFORE THE CHANGE ORDER ADDING THAT ITEM HAS BEEN APPROVED IN THE SYSTEM. IN THIS CASE, WORK WILL BE TRACKED USING THE SITEMANAGER LOOSE LEAF FORMS STORED IN FILE MANAGEMENT (ACCESSIBLE VIA A URL LINK IN THE SYSTEM ATTACHMENTS WINDOW). ONCE THE CHANGE ORDER ITEM HAS BEEN ADDED TO THE CONTRACT, A “CATCH-UP” QUANTITY SHOULD BE PLACED ON THE ITEM AND ALL SUPPORTING SITEMANAGER LOOSE LEAF FORMS SHOULD BE ATTACHED TO THE QUANTITY.

THE OLE ATTACHMENT FUNCTION SHOULD NOT BE USED TO ATTACH .JPG, .BMP OR OTHER PICTURE FILE TYPES. THESE SHOULD BE SAVED IN THE FILE MANAGEMENT SYSTEM.

WHEN SELECTING SECURITY GROUPS FOR ATTACHMENTS, IT IS RECOMMENDED TO CHOOSE “ADD ALL” TO ADD ALL SECURITY GROUPS TO THE ATTACHMENT.

ENTERING A REMARK SUCH AS “VIEW ATTACHMENT” WILL INDICATE TO USERS WHEN VIEWING REPORTS THAT AN ATTACHMENT EXISTS.



Exercise 6

In this exercise, create an attachment on a DWR work item.

User ID **jj00004** Password **pass**
Connection **Standalone**
Group Name **FIELD - Operations Inspector (INSPST)**
Prior Keys **TRN352 (contract); jj00004 (user ID); 10/18/14 (DWR date)**

1. On the toolbar, click the **Attachments** button. The system displays six more attachment-related buttons on the toolbar.
2. On the toolbar, click the **New OLE** button. The system displays the Insert Object window.
3. Click the **Create From File** tab. The system displays the Create From File panel.

Locate the file to attach.

4. Click the **Browse** button. The system displays the Browse window.
5. Select the file to be attached: **C:\SMTRAINS\SMFILES\ITEM #705-02.02 10182014.pdf**
6. **Open**. The system displays the path to the selected file in the File Name field.
7. Click the **OK** button. The system displays the OLE Attachment window.

Describe the attachment.

8. In the **Name** field, type **705-02.02**.
9. In the **Description** field, type **Single Guardrail (Type 2)**.

Provide access to the attachment.

10. In the **Attachment Security** area, click the **Add All** button. The system moves all the selected security groups from the left pane to the right pane.
11. Click the **Add** button. The system closes the OLE Attachment window.

THE DESCRIPTION
FIELD IS IMPORTANT
FOR IDENTIFYING
THE CONTENTS OF
THE ATTACHMENTS.

IMPORTANT!
THE NAME AND
DESCRIPTION
ENTRIES SHOULD
MATCH THE ITEM.

12. On the toolbar, click the **Attachments** button. The system closes the Attachments window and adds a paper clip to the Attachments button to indicate the presence of an attachment.

13. **Save.**

Insert a reminder to the users to view the attachment.

14. Click the **Remarks** button.

15. In the **Remarks** field, type **View Attachment**.

16. To close the Remarks window, click the **Remarks** button again. The system adds lines to the Remarks button to indicate the presence of remarks.

17. **Save.**

View the attachment.

18. On the toolbar, click the **Attachments** button. The system displays the Attachments window.

19. In the **Description** column, select **Single Guardrail (Type 2)**.

20. On the toolbar, click the **Run Attachment** button. The system opens the file with the program associated to the PDF file type.

21. In the **PDF**, click the **Close** button to close the attached document and program.

22. On the toolbar, click the **Attachments** button. The system closes the Attachments window.

23. **Save.**

Prepare for the next exercise.

24. Click the **DWR Info** tab. The system displays the DWR Info panel.

You've attached and viewed an attachment.

THE PDF FILE MAY BE MINIMIZED AT THE BOTTOM OF YOUR COMPUTER, ON THE TASK BAR. CLICK IT TO RESTORE.

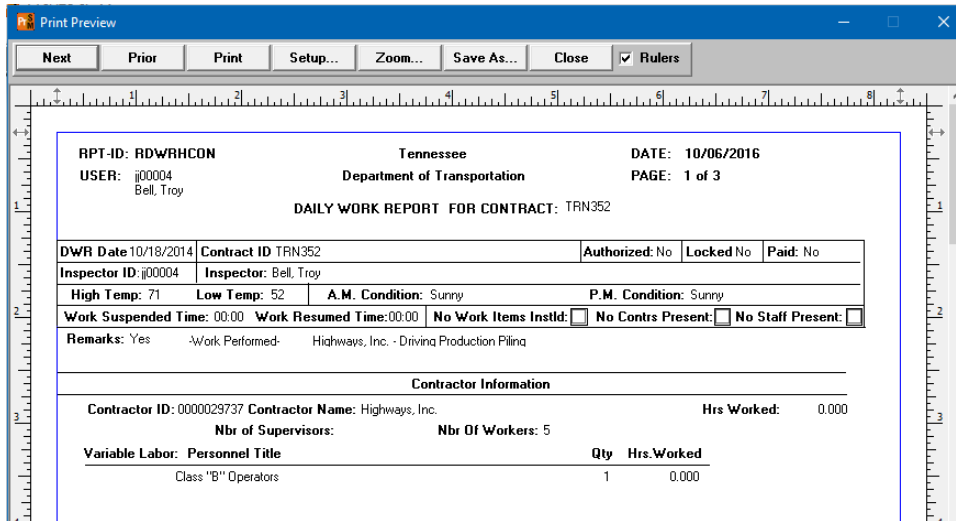


Figure 11. Print Preview Window



Exercise 7

In this exercise, preview a DWR.

User ID **jj00004** Password **pass**
 Connection **Standalone**
 Group Name **FIELD - Operations Inspector [INSPST]**
 Prior Keys **TRN352 (contract); jj00004 (user ID); 10/18/14 (DWR date)**

1. On the **Services** menu, click **Preview DWR**. The system displays the Print Preview window for the DWR.
2. To preview the DWR in a printable format, click the **Next** and **Prior** buttons and use the scroll bar to move from page to page.
3. **Close**. The system displays the Daily Work Reports window.

You've previewed a DWR.

Summary

To create a new Daily Work Report using the copy function:

1. On the **Main Panel** panel, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
3. Open.
4. In the **Contract ID** list box, scroll to and double-click desired Contract.
5. On the **Inspector** list box, scroll to and double-click your user ID.
6. On the **Date** list box, scroll to and double-click desired DWR Date. It may not be a locked or authorized DWR.
7. Double-click the **Date** field. The calendar appears.
8. Advance to the correct month and click the correct date for the new Daily Work Report.
9. Click **OK**.
10. Click the **Yes** button for the message box asking if Contractor information should be copied.
11. **Save**.
12. Click the desired tab.
13. Modify the data appropriately.
14. **Save**.

To attach a file to a record:

1. Click the **Attachment** button.
2. Click the **New OLE** button.
3. Click the **Create from File** tab.
4. Click the **Browse** button.
5. Select the drive and file name for the file to be attached.
6. **Open.**
7. Click **OK.**
8. In the **Name** field, type the name for the document.
9. In the **Attachment Security** box, click the **Add All** button to add all groups to the **Access** box.
10. Click the **Add** button.
11. Click the **Attachment** button.
12. **Save.**

Review Exercise

In this exercise, modify a copied DWR.

User ID **jj00004** Password **pass**
 Connection **Standalone**
 Group Name **FIELD - Operations Inspector (INSPST)**
 Prior Keys **TRN352** (contract); **jj00004** (user ID); **10/18/14** (DWR date)

1. Use the DWR from **Troy Bell (jj00004)** for contract **TRN351** on **10/17/14** to copy and create a new DWR for **10/18/14**. Be sure to copy the contractor information for use in the following steps:

2. Temperature and Weather conditions:

High	59 degrees
Low	36 degrees
AM	Partially Cloudy
PM	Clear

3. Remarks:

Work Performed	Southern Lighting & Traffic Systems - Installed permanent signs.
-----------------------	-----------------------------------------------------------------------------

4. Personnel for Prime Contractor, **Highways, Inc.** (update as necessary):

Class "A" Operator	1
Unskilled Laborer	4
Sweeping Machine (Vacuum) Operator	1
Truck Driver (3/4 axles)	1

5. Personnel for subcontractor, **Southern Lighting & Traffic Systems**
(update as necessary):

Foreman	1
Unskilled Laborer	4
Skilled Laborers	3
Truck Driver (2 axles)	1

6. Equipment for prime contractor, **Highways, Inc.**
(on site and used) (update as necessary):

Pickup Truck	2
Backhoe	1
Haul Truck	1
Sweeping Machine	1

7. Equipment for subcontractor, **Southern Lighting & Traffic Systems**
(on site and used) (update as necessary):

Pickup Truck	2
Haul Truck	1

8. Daily Staff:

Gilligan, Sally	9 hours
Harris, Ellen	9 hours

9. Record the following information for Line Item Nbr **1360**,
Project **67004-3213-14**, Item Code **712-06**:

Plan Page Nbr	16
Contractor	Highways, Inc.
Location	BOP to EOP
Template	SM22A
Sign Schedule #	12B
Legend	General Robert R. Neyland Bridge
Size	24" x 60"
Area of Each Sign	10.0
# of Signs	4

10. What is the placed quantity for this item at this location?
- _____

15. **Exit SiteManager.**

Test Templates to Material Categories

This section contains a table of test templates and their associated material categories.

Template ID	Template Name	TDOT Description	Material Categories
D2950	D2950 - Density of Bituminous Conc in Place by Nuclear Meth	Asphalt Density	307, 313, 411 and 614
D4867	D4867 - Tensile Strength Ratio	Tensile Strength Ratio	307, 313 and 411
M005	M005 - Fractured Face Count	Fractured Face Count	307, 313, 404, 405, 411 and 414
M007	M007 - 10 Minute Boil Test	10 Minute Boil Test	307, 313 and 411
M012	M012 - LOI / Loss On Ignition Test	Loss on Ignition Test (LOI)	307, 313, 404, 405, 411 and 414
M016	M016 - Field Tests of Freshly Mixed Concrete	Concrete Air, Slump, Temp	204, 501, 604, 606, 615, 619 and 622
M018	M018 - Glassy Particle	Glassy Particle	307, 313, 404, 405, 411 and 414
M019	M019 - Asphalt Core Thickness	Asphalt Core Thickness	307, 313 and 411
M021	M021 - Slump Test of Flowable Fill	Flowable Fill Slump	204
T148	T148 - Measuring Length of Drilled Concrete Cores	Concrete Core Length	313, 501 and 604
T164EII	T164EII/T308 Asphalt Content By Extraction/Furnace	Asphalt Content By Extraction/Furnace	307, 313, 410 and 411
T166-245	T166 - Bulk Spec Grav, Stblty and Flow (T166,T275,T331,T245)	Bulk Specific Gravity, Stability and Flow	307, 313 and 411
T166-Cores	T166-Cores - Bulk Specific Gravity From Asphalt Cores	Bulk Specific Gravity from Asphalt Cores	307, 313 and 411
T22	T22 - Compressive Strength of Cylindrical Concrete Specimens	Concrete Cores	204, 501, 604, 615 and 918
T255	T255 - Total Evaporable Moisture of Aggregate by Drying	Moisture Content	303, 401 and 903
T27	T27 - Sieve Analysis of Fine and Coarse Aggregates	Aggregate Gradation	203, 204, 205, 302, 303, 307, 309, 313, 401, 404, 405, 411, 414, 710 and 903
T27_30	T27_30 - AC Content and Sieve Analysis of Asphalt Mix	Asphalt Gradation	307, 411 and 715
T310	T310 - Nuclear Density/Moisture of Soil & Agg.	Soil or Aggregate Density	203, 204, 205, 302, 303, 309 and 903

Processing Sample Records and Test Results for Operations Inspectors

In this chapter, you will receive instruction about the following:

- Creating Sample Records for Contract Materials 3
- Understanding Material Codes 3
- Recording Basic Sample Data for Aggregate at the Plant 8
- Recording Additional Sample Data 11
- Recording Contract Sample Data 13
- Recording Other Sample Data 15
- Handling Test Assignments 17
- LIMS (Laboratory Information Management System) 19
- Entering Test Results in LIMS 20
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- Creating a Sample Record for Aggregate Field Density 30
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▪ Locating Sample Records in SiteManager	62
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Creating Sample Records for Contract Materials

At the beginning of this chapter, you will learn how to create sample records in SiteManager for materials used on a contract. These are electronic records used to capture pertinent information regarding the material used, the related item of work, and any testing requirements.

Later, you will learn how to enter test results on electronic test template forms in the Laboratory Information Management System (LIMS). In addition, you will learn how to review both the test results and samples records, as needed.

Users may record some of these samples and test results in the field, but for the duration of this training all exercises will occur on the server.

Understanding Material Codes

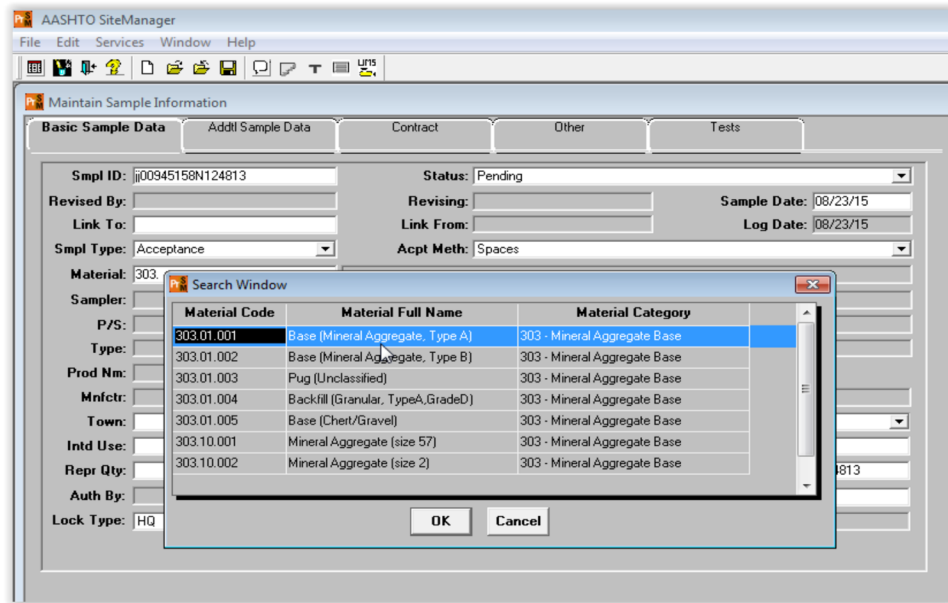
Material codes are numeric identifiers created based on a related section of the Standard Specifications Book and have been assigned to each type of material that can be used in a work item. Users should understand the format of material codes to search more accurately for and select materials on the Maintain Sample Information window.

To view a list of all material codes associated to item codes for any contract, use the *Contract Items to Material Codes* report.

STATE OF TENNESSEE DEPARTMENT OF TRANSPORTATION							
Contract Items to Material Codes							
Contract ID: CH1349							
Project: 67004-3213-14							
Line Item	Item Number	Item Description	Item Unit	Material Code	Material Full Name	Acceptance Method	Sample Type
209-20-03	0560	POLYETHYLENE SHEETING (6 MIL. MINIMUM)	S. Y.	T2.209	T2 Erosion, Siltation Control	CERT	CERT
209-40-34	0600	CATCH BASIN PROTECTION (TYPE E)	EACH	T2.209	T2 Erosion, Siltation Control	CERT	CERT
303-01	0630	MINERAL AGGREGATE, TYPE A BASE, GRADING D	TON	303.01.001	Base (Mineral Aggregate, Type A)	ACPT	ACCP
303-01-01	0640	GRANULAR BACKFILL (ROADWAY)	TON	303.01.001	Base (Mineral Aggregate, Type A)	ACPT	ACCP
303-01-02	2570	GRANULAR BACKFILL (BRIDGES)	TON	303.01.001	Base (Mineral Aggregate, Type A)	ACPT	ACCP
307-01-01	0670	ASPHALT CONCRETE MIX (PG64-22) (BPM-BM) GRADING A	TON	307.03.001	307-A Bit PM Base, PG 64-22	ACPT	ACCP
307-01-03	0660	AGGREGATE (BPM-BM) GRADING A-S MIX	TON	307.03.006	307-AS Bit PM Base, PG 64-22	ACPT	ACCP
307-01-08	0700	ASPHALT CONCRETE MIX (PG64-22) (BPM-BM) GRADING B-M2	TON	307.03.028	307-BM2 Bit PM Base, PG 64-22	ACPT	ACCP
307-02-01	0710	ASPHALT CONCRETE MIX (PG70-22) (BPM-BM) GRADING A	TON	307.03.003	307-A Bit PM Base, PG 70-22	ACPT	ACCP
307-02-03	0730	AGGREGATE (BPM-BM) GRADING A-S MIX	TON	307.03.008	307-AS Bit PM Base, PG 70-22	ACPT	ACCP
307-02-08	0740	ASPHALT CONCRETE MIX (PG70-22) (BPM-BM) GRADING B-M2	TON	307.03.028	307-BM2 Bit PM Base, PG 70-22	ACPT	ACCP
313-03	0750	TREATED PERMEABLE BASE	S. Y.	313.03.001	313 Asph Treat Perm Base Grade PG 64-22	ACPT	ACCP
402-01	0790	BITUMINOUS MATERIAL FOR PRIME COAT (PC)	TON	604.03.006	Emulsion (Asphalt Prime AS-P)	VERI	VERF
403-01	0780	BITUMINOUS MATERIAL FOR TACK COAT (TC)	TON	604.03.005	Emulsion (Anionic Slow-Set SS-1)	VERI	VERF
411-01-07	0790	ACS MIX (PG64-22) GRADING E SHOULDER	TON	411.03.011	411-E (Shoulders) Bit PM, PG 64-22	ACPT	ACCP
411-01-10	0800	ACS MIX (PG64-22) GRADING D	TON	411.03.001	411-D Bit PM, PG 64-22	ACPT	ACCP
411-02-10	0810	ACS MIX (PG70-22) GRADING D	TON	411.03.003	411-D Bit PM, PG 70-22	ACPT	ACCP
411-03-30	9024	RIDEABILITY DEDUCTION	DOLL	999.99.999	No Test Assigned	INFO	INFO
501-01-03	0850	PORTLAND CEMENT CONCRETE PAVEMENT (PLAIN) 10"	S. Y.	501.01.001CP	Class CP, Paving Concrete Mix	ACPT	ACCP
	0850	PORTLAND CEMENT CONCRETE PAVEMENT (PLAIN) 10"	S. Y.	T2.502.1	T2 Dowel and Tie Bars	CERT	CERT
502-08-10	0860	SAWING & RESEALING JOINTS (SILICONE SEALANT)	L. F.	T2.502	T2 Joints	CERT	CERT
604-01-08	9007	CLASS A CONCRETE (BRIDGE) (FOUNDATION LEVELING)	C. Y.	604.01.001A	Class A, Concrete Mix	ACPT	ACCP
604-02-01	2440	CLASS A CONCRETE (BOX BRIDGES)	C. Y.	604.01.001A	Class A, Concrete Mix	ACPT	ACCP
604-02-02	2450	STEEL BAR REINFORCEMENT (BOX BRIDGES)	LB.	T2.5BR	T2 Steel Bar Reinforcement	CERT	CERT
604-02-03	2560	EPOXY COATED REINFORCING STEEL	LB.	T2.EPOXY	T2 Epoxy Coated Steel Bar Reinforcement	CERT	CERT
604-03-01	2560	CLASS A CONCRETE (BRIDGES)	C. Y.	604.01.001A	Class A, Concrete Mix	ACPT	ACCP
604-03-02	2600	STEEL BAR REINFORCEMENT (BRIDGES)	LB.	T2.5BR	T2 Steel Bar Reinforcement	CERT	CERT
604-03-04	2610	PAVEMENT @ BRIDGE ENDS	S. Y.	303.01.001	Base (Mineral Aggregate, Type A)	ACPT	ACCP
	2610	PAVEMENT @ BRIDGE ENDS	S. Y.	604.01.001A	Class A, Concrete Mix	ACPT	ACCP
	2610	PAVEMENT @ BRIDGE ENDS	S. Y.	607.01.003	Steel (Reinforcing)	VERI	VERF
	2610	PAVEMENT @ BRIDGE ENDS	S. Y.	608.01.001	Steel (Structural)	ACPT	ACCP

Figure 1. Contract Items to Material Codes Report (CR05) – Example of Page 2

Always, select the correct material code to ensure the correct item codes and destination labs are available to select.



TIP!
 LOOK AT THE FULL NAME OF THE MATERIAL. MATERIAL CODES ARE VERY SIMILAR TO ITEM CODES.

Figure 2. Maintain Sample Information Window – Detail of Search Window Available from Material Field

EXAMPLE OF A MATERIAL CODE FORMAT:

MATERIAL CODE 303.01.001 – BASE (MINERAL AGGREGATE, TYPE A)

- 303 - SPEC BOOK SECTION
- .01 - SPEC BOOK SUBSECTION
- .001 - SEQUENTIAL NUMBER

EXAMPLE OF A T2 MATERIAL CODE FORMAT:

MATERIAL CODE T2.705 – T2 GUARDRAIL (NEW)

- T2. – BEGINS ALL MATERIAL CODES USED FOR CERTIFICATION
- 705 – REPRESENTS THE FIRST THREE DIGITS OF THE ITEM CODE
- .1 – A ONE-DIGIT SEQUENTIAL NUMBER, WHEN NEEDED)

EXCEPTION: SINCE STEEL BAR (T2.SBR) AND EPOXY COATED STEEL BAR (T2.EPOXY) ARE REQUIRED ON MULTIPLE ITEMS, THEIR MATERIAL CODES DO NOT REFERENCE A SECTION OF THE SPEC BOOK.

Understanding Sample Type and Acceptance Method Pairings

Understand the sample type and acceptance method pairings to aid in the satisfying of sample and testing requirements.

Warning! If users that log samples select the incorrect sample type and acceptance method for a sample, then the sample will not meet contract sampling and testing requirements.

REFER TO SPECIFIC SECTIONS OF THE *STANDARD OPERATING PROCEDURE* (SOP 1-1, "PROCEDURES FOR THE SAMPLING, TESTING AND ACCEPTANCE OF MATERIALS AND PRODUCTS") FOR MORE DETAILED INFORMATION.

Sample Type	Acceptance Method	Purpose of the Sample Type and Acceptance Method Pairing
Acceptance	Acceptance	<p>Suggested uses:</p> <ul style="list-style-type: none"> ▪ Use for construction field testing of asphalt mix, concrete mix, soil, and aggregates. ▪ Use if the material qualifies as small quantity. ▪ Fence sampled at the job site, but tested in the lab.
Verification	Verification	<p>Warning! For M & T use only.</p> <p>Suggested uses:</p> <p>To verify certifications.</p> <ul style="list-style-type: none"> ▪ When recording an asphalt split sample, for the part tested in the lab. Link the two sample records of the asphalt sample by lab control number. ▪ When recording contract-specific samples such as steel bar, asphalt cement, emulsions and pavement marking materials.
Independent Assurance	Independent Assurance	<p>Warning! For M & T use only.</p> <p>Suggested uses:</p> <ul style="list-style-type: none"> ▪ When recording independent assurance samples.
Certification	Certification	<p>Suggested uses:</p> <ul style="list-style-type: none"> ▪ When recording a T2 for a material that meets TDOT specifications. ▪ When accepting a material based on certification. ▪ Use for visually accepted samples.
Information Only	Information Only	<p>This pairing will not satisfy any contract sampling and testing requirements.</p> <p>Suggested uses:</p> <ul style="list-style-type: none"> ▪ When sampling to establish a target value for soils to meet in the field. ▪ When recording samples to select aggregate producers/samplers for ticketed items.

Sample Type	Acceptance Method	Purpose of the Sample Type and Acceptance Method Pairing
Quality	Acceptance	<p>Warning! For M&T use only.</p> <p>Suggested uses:</p> <ul style="list-style-type: none"> ▪ When FIELD - M&T Inspector samples batches of grey iron, metal pipe heat numbers, and components that make up pre-stressed bridge members. ▪ When FIELD - M&T Inspector runs aggregate gradations at quarries and ready mix plants. ▪ When recording an aggregate sample taken to ensure expected quality of material. ▪ When recording a rip-rap sample to ensure quality for a contract.
Design	Information Only	<p>Warning! For M&T use only. This pairing will not satisfy any contract sampling and testing requirements.</p> <p>Suggested uses:</p> <ul style="list-style-type: none"> ▪ ONLY when sampling for the Mix Design approval process.
Quality	QA/QC	<p>Warning! For M&T use only. This pairing will not satisfy any contract sampling and testing requirements.</p>

Table 1. TDOT Sample Type and Acceptance Method Pairings

OPERATIONS PERSONNEL WILL ONLY USE THE FOLLOWING THREE SAMPLE TYPE/ACCEPTANCE METHOD COMBINATIONS.

- ACCEPTANCE/ACCEPTANCE - USED WITH MATERIAL CODES THAT HAVE ACTUAL RATE/FREQUENCY TESTING REQUIREMENTS PER THE *STANDARD OPERATING PROCEDURES* (SOP). FOR EXAMPLE, A DENSITY TEST MUST BE PERFORMED ON PLANT MIX ASPHALT EVERY 1000 TONS SO SITEMANAGER EXPECTS 1/1000 (RATE/FREQUENCY).
- CERTIFICATION/CERTIFICATION - USED BY OFFICE STAFF ONLY TO RECORD ITEMS PAID BY T-2.
- INFORMATION ONLY/INFORMATION ONLY - USED ONLY WHEN CREATING SAMPLE RECORDS THAT DO NOT COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.

Understanding Sample Status Descriptions

Understand sample status descriptions to aid in the location of sample/test records in the LIMS queues. If multiple tests have been associated to a sample record, the sample status reflects the location of the earliest queue with a test requiring an action.

Sample Status Description	Sample/Test Record Location Requiring Action
Pending	Maintain Sample Information window before tests have been assigned to the sample record.
Logged	Receive Sample at Destination Lab window after tests have been assigned and before the sample record has been marked 'Sample Received'.
Received	<p>Enter Test Results window after tests have been assigned to TDOT Field Lab or TDOT Contractor Lab and before the first test is started.</p> <p>If applicable, after the sample has been marked 'Sample Received' in the Receive Sample in Destination Lab window at the Materials & Tests Destination Lab and before it has been marked 'Sample Received' in the Receive Sample in Lab Unit window.</p>
In Testing	Enter Test Results window after a test on the sample record has been started and the Review Tests windows until all tests associated to the sample record have been marked 'Review Completed' in the Review Tests window.
Pre-Authorization	Review Samples window after all tests have been marked 'Review Complete' in the Review Tests window.
Completed / Completed, with No Tests Required / Failed / Failed, but Left in Place / Voided	Maintain Sample Information window after the sample record has been authorized in the Review Samples window or, if applicable, auto-finalized from the Review Tests window.

Table 2. Sample Status Descriptions and Associated Sample/Test Record Locations

Recording Basic Sample Data for Aggregate at the Plant

Use the Basic Sample Data panel to create sample records and enter information about the material and associated data.

The screenshot shows a software window titled "Maintain Sample Information" with a "Basic Sample Data" tab selected. The form contains the following fields and values:

- Smpl ID: j000011671105600
- Status: Pending
- Revised By: (empty)
- Revising: (empty)
- Sample Date: 07/18/16
- Link To: (empty)
- Link From: (empty)
- Log Date: 07/18/16
- Smpl Type: Acceptance
- Acpt Meth: Acceptance
- Material: 303.01.001 Base (Mineral Aggregate, Type A)
- Sampler: j00001 Morgan, Bailey
- P/S: Rogers Group - Cookeville 27100004
- Type: Producer/Supplier
- City: Cookeville
- Prod Nm: (empty)
- Mnfctr: (empty)
- Town: (empty)
- Geog Area: Region 2 - Overton
- Intd Use: (empty)
- Repr Qty: 1,000.000 Ton
- Lab Control Number: CNj000011671105600
- Auth By: (empty)
- Auth Date: 00/00/00
- Lab Reference Number: (empty)
- Lock Type: (empty)
- Locked By: j00001
- Lock Date: 7/18/2016 10:58:14
- HQ:
- Region: 2

THE 'REPR QTY' FIELD ON THIS PANEL IS FOR INFORMATION ONLY. THE QUANTITY IS NOT TIED TO TESTING REQUIREMENTS.

Figure 3. Maintain Sample Information Window - Basic Sample Data Panel

WHEN CREATING A SAMPLE IT IS IMPORTANT TO RECORD THE FOLLOWING:

- SAMPLE DATE = DATE SAMPLE WAS TAKEN
- SMPL TYPE = ACCEPTANCE, CERTIFICATION OR INFORMATION ONLY
- ACPT METH = ACCEPTANCE, CERTIFICATION OR INFORMATION ONLY
- MATERIAL = MATERIAL CODE
- SAMPLER = PERSON TAKING THE SAMPLE
- P/S = PRODUCER/SUPPLIER OF THE MATERIAL
- GEOG AREA = LOCATION WHERE THE SAMPLE WAS TAKEN
- REPR QTY = ACTUAL QUANTITY PLACED



Exercise 1

In this exercise, create a sample record of a material and record the basic sample data.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Scenario	Yesterday, the FIELD - Operations Inspector sampled aggregate from the plant and performed the necessary tests in the contractor's lab, but did not have time to create the sample record. Today, the FIELD - Operations Inspector creates the sample record in SiteManager and enters test results in LIMS.		

1. Start and log onto SiteManager as user **jj00001** *while connected in server mode*.
2. On the **Main Panel**, double-click the **Materials Management** icon.
3. On the **Materials Management** panel, double-click the **Sampling and Testing** icon.
4. On the **Sampling and Testing** panel, double-click the **Sample Information** icon. SiteManager displays the Maintain Sample Information window.
5. In the **Sample Date** field, type **< yesterday's date >**.

Note: The Sample Date field should reflect the date the sample was taken (not the defaulted date or the date the sample was entered).

6. On the **Smpl Type** dropdown list, select **Acceptance**.
7. On the **Acpt Meth** dropdown list, select **Acceptance**.
8. In the **Material** field, type **303**.
9. Using the right mouse button, click on the **Material** field.
10. From the object menu, select the **Filter Search** choice.
11. In the **Material Code** column, double-click **303.01.001**. The system displays the full name of the material, Base (Mineral Aggregate, Type A) to the right of the material code.

TIP!

TYPE THE FIRST LETTER OF THE DESIRED CHOICE IN A DROPDOWN LIST.

EXAMPLE: TYPE 'A' FOR 'ACCEPTANCE.'

12. In the **Sampler** field, type **jj00001**.
13. Using the right mouse button, click on the **P/S** field.
14. From the object menu, select **Search**.
15. To sort the records by name, click the **Producer Supplier Name** column header.
16. In the **Producer Supplier Name** column, double-click **Rogers Group - Cookeville**.
17. On the **Geog Area** dropdown list, select **Region 2 - Overton**.

Tip! Select the location where the sample was taken, not the location of the job.

18. In the **Repr Qty** field, type **1000**. This represents the amount of material placed yesterday.
19. **Save**.
20. Record the entire sample ID: _____

You've created a new sample record and recorded basic sample data.

TIP! USE THE SCROLL BAR TO SEE ALL THE AVAILABLE CHOICES.

Recording Additional Sample Data

To capture sample details such as sampled at mill, plant or job, sample size, and stationing information or to associate sample details and test results to mix designs use the Addtl (Additional) Sample Data panel.

The screenshot shows the 'Maintain Sample Information' window with the 'Addtl Sample Data' panel active. The panel contains the following fields and controls:

- Smpl ID:** j000011671105600
- Buy American:** Spaces
- Reqst By:** [Text Field]
- Witnessed By:** [Text Field]
- Smpl Size:** [Text Field] Spaces
- Dist from Grade:** [Text Field] Spaces
- Station:** [Text Field]
- Offset:** [Text Field]
- Reference:** [Text Field]
- Smpl From:** Truck
- Smpl Origin:** [Text Field]
- Control Type:** Spaces
- Cntrl Number:** [Text Field]
- Seal Number:** [Text Field]
- Design Type:** Spaces
- Mix ID:** [Text Field]
- Plant ID:** 27100004
- Plant Type:** Aggregate
- Creator User ID:** j00001
- Include Standard Remarks:**
- Sample Created from DWR:**
- Last Modified User ID:** j00001
- Last Modified Date:** 07/18/16
- DWR Date:** 00/00/00
- DWR Inspector:** [Text Field]

Figure 4. Maintain Sample Information Window - Addtl Sample Data Panel

Note: The fields on the Addtl Sample Data panel that are required by policy vary based on the type of material sampled.



Exercise 2

In this exercise, record the additional sample data.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	Same sample ID from previous exercise.		
Scenario	Continued		

1. Click the **Addtl Sample Data** tab. The system displays the Addtl Sample Data panel.
2. In the **Smpld From** field, type **Truck**.
3. Using the right mouse button, click on the **Plant ID** field.
4. From the object menu, select the **Search** choice.
5. In the **Plant ID** column, double-click **27100004**.

Tip! There will be only one available. Selecting a plant ID populates the Plant Type field with the associated plant type, which is useful for reporting.

6. **Save**.

You've recorded additional sample data on a sample record.

Recording Contract Sample Data

To associate sample details and test results for a material to specific contracts and contract items, use the Contract panel.

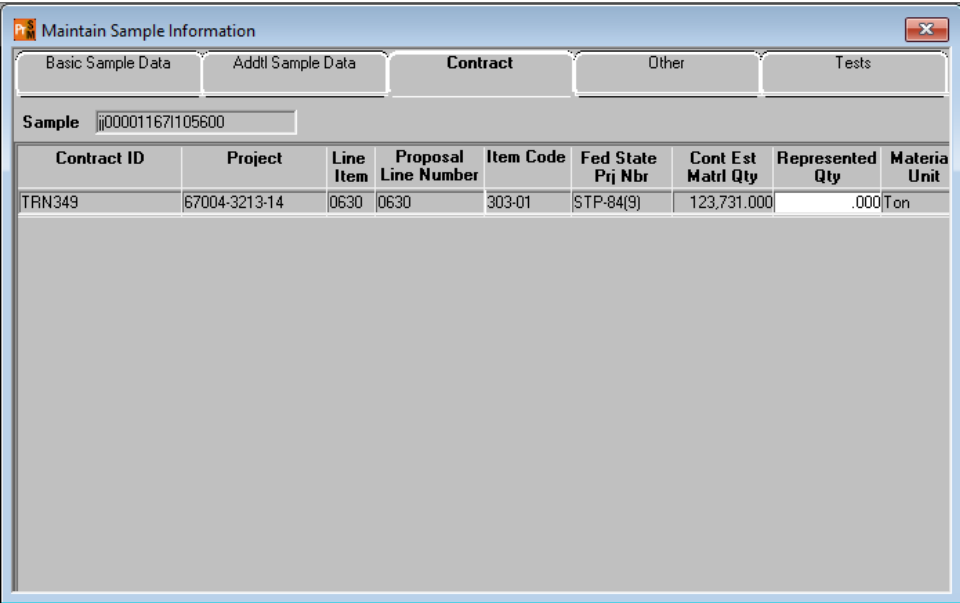


Figure 5. Maintain Sample Information Window - Contract Panel

THE REPRESENTED QTY FIELD ON THE CONTRACT PANEL SHALL ONLY BE USED BY OFFICE STAFF WHEN ENTERING T2 INFORMATION.

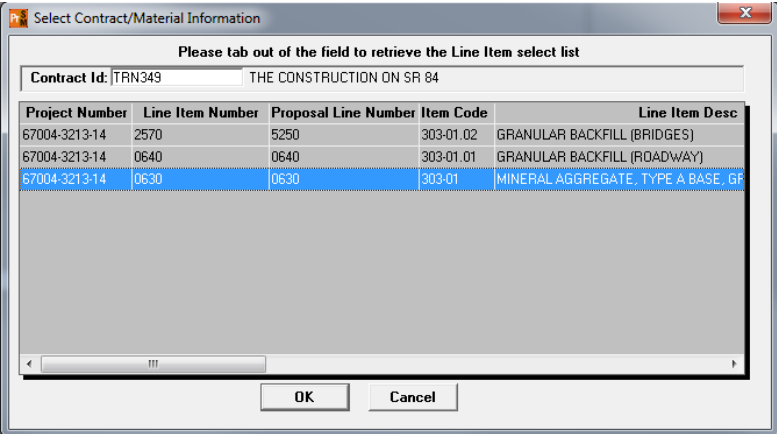


Figure 6. Select Contract/Material Information Window



Exercise 3

In this exercise, record the contract sample data.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	Same sample ID from previous exercise.		
Scenario	Continued		

1. Click the **Contract** tab. The system displays the Contract panel.
2. On the toolbar, click the **New** button. The system displays the Select Contract/Material Information window.
3. Using the right mouse button, click on the **Contract ID** field.
4. From the object menu, select the **Search** choice.
5. In the **Contract ID** column, double-click **TRN349**. The system displays information about the associated items.
6. In the **Item Code** column, select **303-01**.
7. Click **OK**. The system closes the Select Contract/Material Information window and displays the selected item in the Contract panel.

Tip! Do not record a value in the Represented Qty field. Sample and testing requirements for this material on this item are satisfied by the frequency of samples, not represented quantity.

Example: If the SOP requires 1 test per 1000 tons of material placed then the rate/frequency is 1/1000. Leaving this field blank forces the system to check for the proper number of tests entered for work performed.

8. **Save.**

You've recorded contract sample data on a sample record.

Recording Other Sample Data

To assign the sample to a destination lab and other information, use the Other panel.

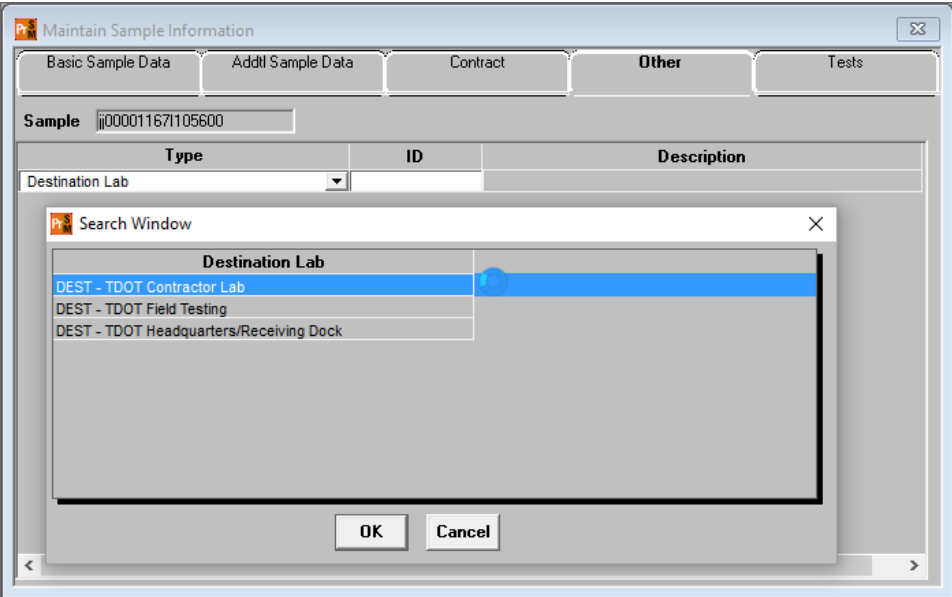


Figure 7. Maintain Sample Information Window - Other Panel (with Search Window detail)



Exercise 4

In this exercise, record the other sample data.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	Same sample ID from previous exercise.		
Scenario	Continued		

1. Click the **Other** tab. The system displays the Other panel.
2. On the keyboard, press the **space bar**. The system displays Destination Lab in the Type field.
3. Using the right mouse button, click on the **ID** field.
4. From the object menu, select the **Search** choice. The system displays the Search Window window
5. In the **Destination Lab** column, double-click **DEST – TDOT Contractor Lab**. The system closes the Search Window window.
6. **Save**.

TIP!

IF THERE IS NOT A NEW ROW WHEN YOU OPEN THIS PANEL, YOU MAY HAVE TO CLICK IN WINDOW BEFORE CLICKING NEW.

You've recorded the destination lab for a sample.

Handling Test Assignments

Some tests have been pre-determined as default tests for the selected material, because users often perform these tests on the material. Use the Assign Sample Tests window to remove default tests or to assign another available test.

Users can assign tests to a sample only once from the Assign Sample Tests window. After accepting default tests or saving assigned tests for a sample record, users can no longer add or remove tests via this window.

Tip! To see which tests are assigned by default, click the More button.

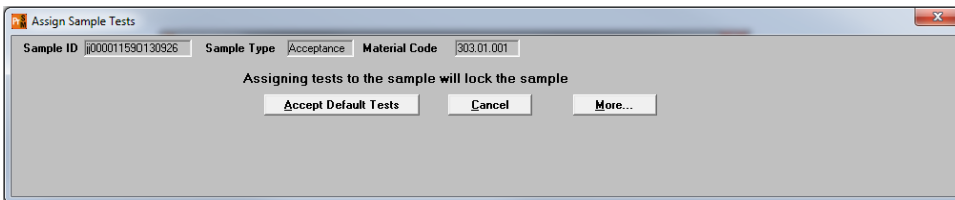


Figure 8. Assign Sample Tests Window

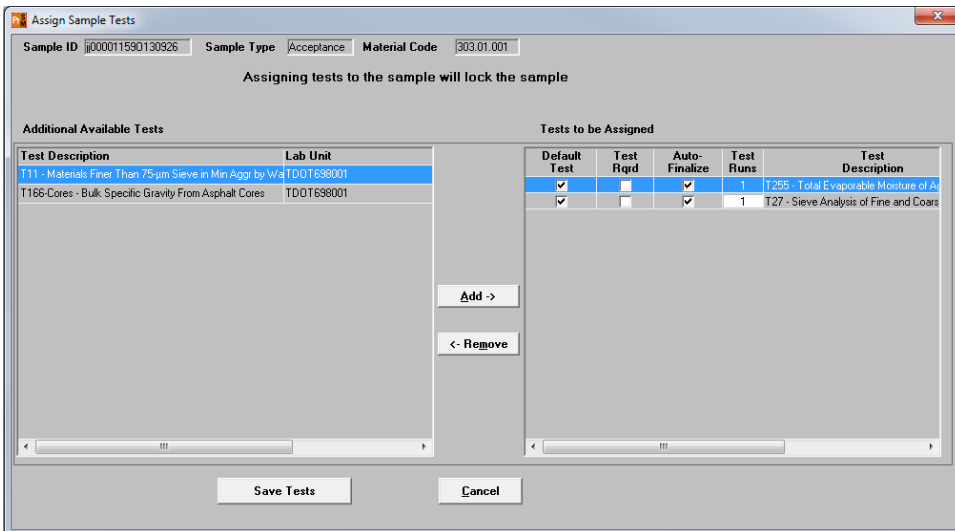


Figure 9. Assign Sample Tests Window (after clicking More button)



Exercise 5

In this exercise, assign the necessary tests.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD – Operations Inspector [INSP]		
Prior Keys	Same sample ID from previous exercise.		
Scenario	Continued		

1. On the toolbar, click the **Open Assign Tests** button. The system displays the Assign Sample Tests window.

Note: The message on the window warns that assigning tests to the sample will lock the sample. If uncertain about the tests needed for the sample, click the Cancel button.

TDOT recommends always clicking More instead of Accepting Default Tests.

2. Click **More**.

Note: Both tests in this example, **T255 - Total Evaporable Moisture of Aggregate by Drying** and **T27 - Sieve Analysis of Fine and Coarse Aggregates**, are default tests so no further action is required.

3. Click **Save Tests**. The system closes the Assign Sample Tests window, makes the Open Assign Tests button unavailable, changes the sample status to Received, and displays the Basic Sample Data panel.

Prepare for the next part of the exercise using an instructor-created sample.

4. On the toolbar, click the **Open** button. The system displays the Select Sample window.
5. In the **Sample ID** column, click the column header. The system makes the Find field available.
6. In the **Find** field, type **102054**. The system selects the first row with that combination of numbers.
7. Did it select the sample record **jj0000115AD102054**?
If Yes, continue.
If No, scroll to and select sample ID jj0000115AD102054.
8. Click **OK**. The system displays the Basic Sample Data panel.

You've assigned the necessary tests and viewed the list of tests assigned to a sample record.

INSTRUCTOR-CREATED RECORDS ARE PRESENT THROUGHOUT THE TRAINING AND SERVE AS RESET POINTS TO ENSURE STUDENTS ARE KEEPING PACE.

WHEN USING THE FIND FEATURE WITH THE LAST NUMBERS OF A SAMPLE ID, BE SURE TO VERIFY THAT THE SYSTEM SELECTED THE DESIRED SAMPLE ID. WHILE THE ENTIRE SAMPLE ID IS UNIQUE, THE SYSTEM MAY DUPLICATE THE LAST DIGITS ON OTHER SAMPLE IDS (AS IT RELATES TO THE TIME THE SAMPLE RECORD WAS CREATED). THE FIND FEATURE SELECTS THE FIRST SAMPLE ID CONTAINING THE DESIRED COMBINATION OF NUMBERS.

LIMS (Laboratory Information Management System)

Use LIMS to enter, review and authorize test results.

To access LIMS, when logged onto SiteManager, click the Open LIMS button on the Maintain Sample Information window's toolbar.

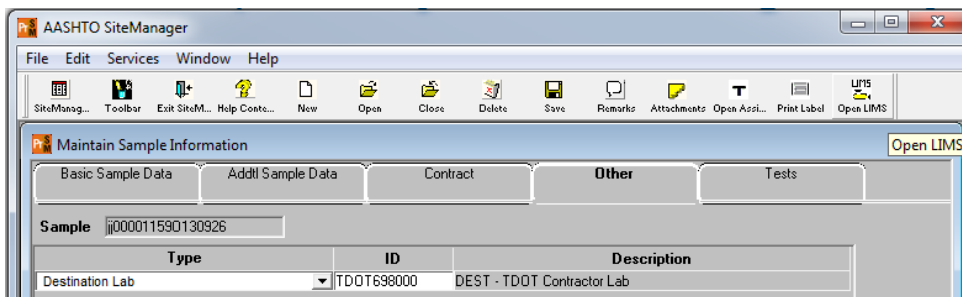


Figure 10. Maintain Sample Information Window (toolbar detail with Open LIMS button)

Or, to go directly to LIMS without logging into SiteManager, double-click the LIMS icon on your desktop and log in.



Figure 11. SiteManager LIMS Desktop Icon

Entering Test Results in LIMS

To record test results, use the Enter Test Results window.

In the Enter Test Results window:

- Use the top pane to locate your sample record.
- Use the middle pane to view a list of samples and associated tests.
- Use the lower pane to record information in the test template for the row selected in the middle pane.

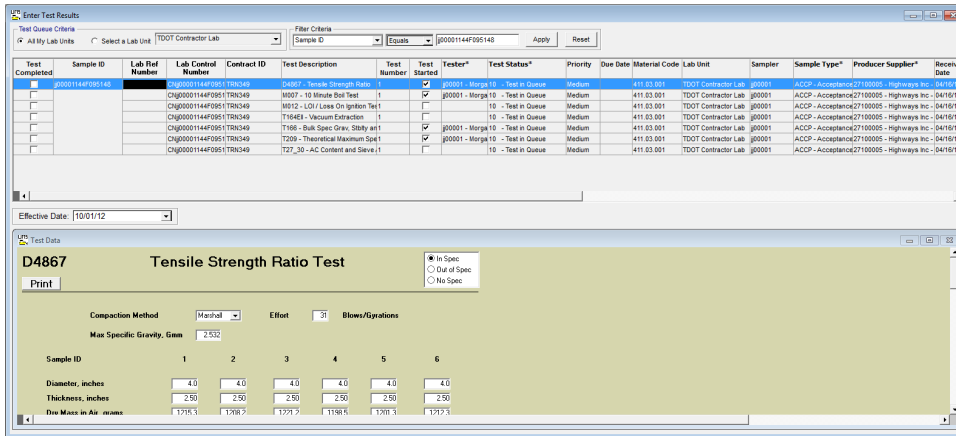


Figure 12. LIMS – Enter Test Results Window

Using Material Templates to Enter Test Results

Each template has a header containing the test description and an area below the header with three test result status descriptions: In Spec, Out of Spec, and No Spec.

Based on test results, the system automatically denotes the status. If the test results entered do not fall within the required specifications, the system highlights the results in red with an asterisk (*) to flag the failed test result.



Exercise 6

In this exercise, open LIMS, create and apply a filter, and enter test results into a material test template.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD – Operations Inspector [INSP]		
Prior Keys	Not applicable.		
Scenario	The FIELD - Operations Inspector at the plant enters the test results into the T255 - Total Evaporable Moisture of Aggregate by Drying and T27 - Sieve Analysis of Fine and Coarse Aggregates test templates.		

1. On the toolbar, click the **Open LIMS** button. The system launches the LIMS component.
2. On the **Navigation Panel**, double-click the **Enter Test Results** icon. LIMS displays the Enter Results window.
3. In the **Test Queue Criteria** area, note that the **All My Lab Units** choice has been selected.
4. In the **Filter Criteria** area, create a filter where **Sample ID Contains 102054**.
5. Click the **Apply** button. The system displays the tests associated to sample jj0000115AD102054 for the FIELD - Operations Inspector to perform in the TDOT Contractor Lab.

Enter the test results for the T255 test.

- In the **Test Description** column, select the row for **T255 - Total Evaporable Moisture of Aggregate by Drying**. The system displays the material test template in the lower pane or Test Data window.
- On the Test Data window, click the **Maximize** button to view more of the template at once.

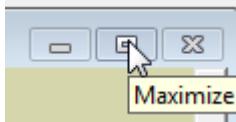


Figure 13. LIMS - Enter Test Results Window - Test Data - Maximize Button - Detail

T255
Total Evaporable Moisture Content of Aggregate by Drying

In Spec
 Out of Spec
 No Spec

Sample Weight (A) g

Sample Weight (oven dry) (B) g

Moisture Content $100 \cdot (A-B)/B$ %

Remarks

Version 1.2 (03-19-15)

Sample Size for Aggregates	
Nominal Maximum size of Aggregate	Minimum Mass of Sample (grams)
#4	500
3/8"	1500
1/2"	2000
3/4"	3000
1"	4000
1 1/2"	6000
2"	8000
2 1/2"	10000
3"	13000
3 1/2"	16000
4"	25000
6"	50000

Figure 14. LIMS – Enter Test Results Window – Test Data – Detail

- Complete the following fields on the template with the values provided.

Sample Weight (A)	6575.5
Sample Weight (oven dry) (B)	6290.0

Tip! After entering results, press the Tab key to move from field to field and to prompt the template to calculate the moisture content.

- What is the percentage of moisture content? _____

10. On the Test Data window, click the **Restore Down** button or drag/resize the test template back to the bottom pane.

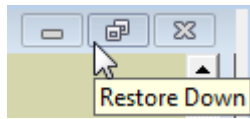


Figure 15. LIMS – Enter Test Results Window – Test Data – Restore Down Button – Detail

11. **Save.**
12. Note that the test results are no-spec.
13. In the **Test Completed** column, select the check box.
14. **Save.** The system removes the test from the queue.

Enter the test results for the T27 test.

15. For sample ID jj0000115AD102054, in the **Test Description** column, select the row for **T27 – Sieve Analysis of Fine and Coarse Aggregate**. The system displays the material test template in the lower pane or Test Data window.
16. On the Test Data window, click the **Maximize** button to view more of the template at once.

T27
Sieve Analysis of Fine and Coarse Aggregate

In Spec
 Out of Spec
 No Spec

Initial Weight
 g

Sieve Size	Weight Retained	Actual % Passing	Actual % Retained	Min % Passing	Max % Passing
4.0000 in (4)	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
3.5000 in (3 1/2)	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
3.0000 in (3)	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
2.5000 in (2 1/2)	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
2.0000 in (2)	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
1.5000 in (1 1/2)	<input type="text" value="0"/> g	<input type="text" value="100.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="100"/> %	<input type="text" value="100"/> %
1.0000 in (1)	<input type="text" value="0"/> g	<input type="text" value="100.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="85"/> %	<input type="text" value="100"/> %
0.7500 in (3/4)	<input type="text" value="800.0"/> g	<input type="text" value="68.0"/> %	<input type="text" value="32.0"/> %	<input type="text" value="60"/> %	<input type="text" value="95"/> %
0.6250 in (5/8)	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
0.5000 in (1/2)	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
0.3750 in (3/8)	<input type="text" value="1000.0"/> g	<input type="text" value="60.0"/> %	<input type="text" value="40.0"/> %	<input type="text" value="50"/> %	<input type="text" value="80"/> %
No. 004	<input type="text" value="1500.0"/> g	<input type="text" value="40.0"/> %	<input type="text" value="60.0"/> %	<input type="text" value="40"/> %	<input type="text" value="65"/> %
No. 008	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
No. 010	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
No. 016	<input type="text" value="2000.0"/> g	<input type="text" value="20.0"/> %	<input type="text" value="80.0"/> %	<input type="text" value="20"/> %	<input type="text" value="40"/> %
No. 030	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
No. 040	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
No. 050	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
No. 100*	<input type="text" value="22235.0"/> g	<input type="text" value="-789.4"/> %	<input type="text" value="889.4"/> %	<input type="text" value="9"/> %	<input type="text" value="18"/> %
No. 200	<input type="text" value="0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
F.M.		<input type="text" value="0.00"/>			
Pan Weight	<input type="text" value="2498.3"/> g				
Additional (-) minus 200 Matl	<input type="text" value="2498.3"/> g				
Total Material Passing #200	<input type="text" value="99.9"/> %				
% Moisture at Plant	<input type="text" value="4.5"/> %				

Remarks

Version 2.2 (05-29-15)

Figure 10. LIMS – Enter Test Results Window – Test Data – Detail

17. Complete the following fields on the template with the values provided.

Initial Weight	2500.0
1.5000 in (1 1/2)	0.0
1.0000 in (1)	0.0
0.7500 in (3/4)	800.0
0.3750 in (3/8)	1000.0
No. 004	1500.0
No. 016	2000.0
No. 100	22235.0
Pan Weight	2498.3
% Moisture at Plant	4.5
Remarks	QC notified.

18. On the Test Data window, click the **Restore Down** button.
19. **Save**.
20. Note that the test results are out-of-spec.
21. In the **Test Completed** column, select the check box.
22. **Save**. The system removes the test from the queue.

TIP!

ALWAYS RESTORE DOWN
BEFORE SAVING.

Clear the filter and close the window.

23. In the **Filter Criteria** area, to clear the filter, click the **Reset** button. The system displays the remaining tests in the queue.
24. **Close**. The system displays the Navigation Panel window.

You've opened LIMS, created and applied a filter, entered test results into a material test template, and marked them complete.

Reviewing Test Results

Use the Review Tests window to review template data for tests previously marked complete in the Enter Tests Results window. In this window, mark completed tests as Review Completed, Re-Queue or Order Retest.

- **Review Completed** - Indicates that the reviewer considers the test result data to be entered correctly, not necessarily that the test will satisfy sampling and testing requirements.
- **Re-Queue** - Sends test back to the Enter Test Results window for corrections.
- **Order Retest** – Cancels the current test and prompts the user to add additional tests to the sample record.

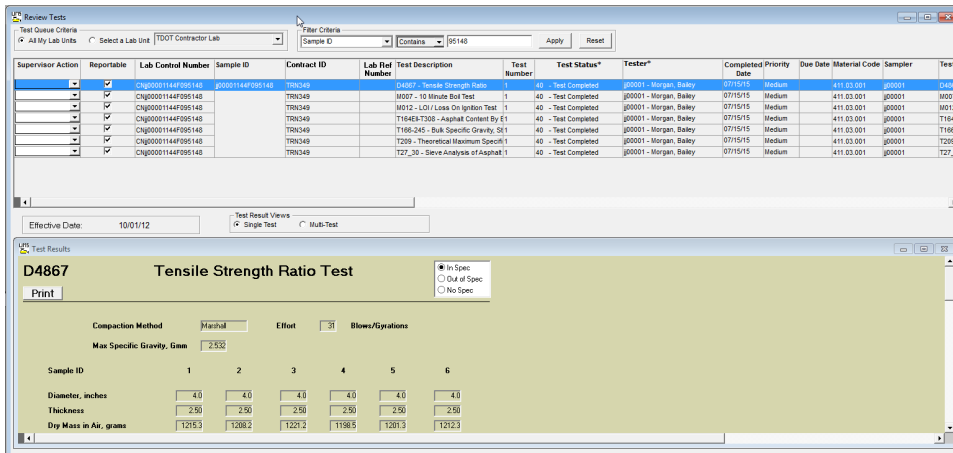


Figure 16. Review Tests Window

Important! If results for any test are out-of-spec (failing), the sample must be reviewed in the Review Samples window after marking all tests as Review Completed in the Review Tests queue.



Exercise 7

In this exercise, progress the test through the Review Tests queue.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	jj0000115AD102054 (sample ID)		
Scenario	FIELD - Operations Inspector reviews the entered test results for all tests performed in a contractor's lab.		

1. On the Navigation Panel window, double-click the **Review Tests** icon. The system displays the Review Tests window.

Create and apply a filter.

2. In the **Filter Criteria** area, create a filter where **Sample ID Contains 102054**.
3. Click the **Apply** button.
4. In the **Sample ID** column, verify that all rows pertain to sample record **jj0000115AD102054**.

Review the results for the T27 test.

5. For sample ID jj0000115AD102054, in the **Test Description** column, select **T27 – Sieve Analysis of Fine and Coarse Aggregate**.
6. In the Test Results window, notice that the system selected the **Out of Spec** indicator.
7. Confirm the results.
8. Note that the value entered in the **No. 100** field should be **2235.0**, not **22235.0**.

Send the test record back to the Enter Test Results queue and provide a reason.

9. From the **Supervisor Action** dropdown list, select **Re-Queue**. The system displays the Remarks window to prompt the user for a reason the test is being requeued.
10. Click the **Requeue** remark type.

11. In the remark field, type

10/13/2015 - B. Morgan - There was a typo when entering test results for No. 100.

12. On the toolbar, click the **Remarks** button. The system closes the Remarks window.

13. **Save.** The system removes the test record from the Review Tests queue.

14. **Close.** The system displays the Navigation Panel window.

Open the Enter Test Results window.

15. On the Navigation Panel window, double-click the **Enter Test Results** icon. LIMS displays the Enter Results window.

16. In the **Test Queue Criteria** area, if not already selected, select **All My Lab Units**.

Create a filter.

17. In the **Filter Criteria** area, create a filter where **Sample ID Contains 102054**.

18. Click the **Apply** button. The system displays the results of the filter.

19. For sample ID jj0000115AD102054, in the **Test Description** column, select the row for **T27 – Sieve Analysis of Fine and Coarse Aggregate**. The system displays the material test template in the lower pane or Test Data window.

Make the necessary changes.

20. On the Test Data window, click the **Maximize** button to view more of the template at once.

21. In the **No. 100** field, change the value to **2235.0**.

22. On the Test Data window, click the **Restore Down** button.

23. **Save.**

Mark the T27 test complete.

24. In the **Test Completed** column, select the check box.

25. **Save.** The system removes the test from the queue.

Clear the filter.

26. In the **Filter Criteria** area, to clear the filter, click the **Reset** button. The system displays the remaining tests in the queue.
27. **Close**. The system displays the Navigation Panel window.

Review the test again and mark the T27 test review complete.

28. On the Navigation Panel window, double-click the **Review Tests** icon. The system displays the Review Tests window.
29. For sample ID jj0000115AD102054, in the **Test Description** column, select **T27 – Sieve Analysis of Fine and Coarse Aggregate**.
30. From the **Supervisor Action** dropdown list, select **Review Completed**.
31. **Save**. The system removes the test record from the Review Tests queue.

Review the test and mark the T255 test review complete.

32. For sample ID jj0000115AD102054, in the **Test Description** column, select **T255 – Total Evaporable Moisture of Aggregate by Drying**.
33. In the Test Results window, notice that the system selected the **No Spec** indicator.
34. Confirm the results.
35. From the **Supervisor Action** dropdown list, select **Review Completed**.
36. **Save**. The system removes the test record from the Review Tests queue.

Clear the filter.

37. In the **Filter Criteria** area, to clear the filter, click the **Reset** button. The system displays the remaining tests in the queue.

Prepare for the next exercise.

38. **Exit SiteManager LIMS**. The system displays the Maintain Sample Information window.

You've progressed the tests through the Review Tests queue.

Creating a Sample Record for Aggregate Field Density



Exercise 8

In this exercise, create a sample record of the material to be tested in the field.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	jj0000115AD102054 (sample ID)		
Scenario	Field – Operations Inspector creates a sample record for tests performed on density at the jobsite.		

1. On the toolbar, click **New**. The system creates a new sample record.
2. In the **Sample Date** field, type < **yesterday's date** >.

Note: The Sample Date field should reflect the date the sample was taken.

3. On the **Smpl Type** dropdown list, select **Acceptance**.
4. On the **Acpt Meth** dropdown list, select **Acceptance**.
5. In the **Material** field, type **303**.
6. Using the right mouse button, click on the **Material** field.
7. From the object menu, select the **Filter Search** choice.
8. In the **Material Code** column, double-click **303.01.001**.
9. In the **Sampler** field, type **jj00001**.
10. Using the right mouse button, click on the **P/S** field.
11. From the object menu, select **Search**.
12. In the **Producer Supplier Name** column, double-click **Rogers Group - Cookeville**.

13. On the **Geog Area** dropdown list, select **Region 2 - Overton**.

Tip! Select the location where the sample was taken, not the location of the job.

14. In the **Repr Qty** field, type **1000**.

15. **Save**.

16. Record the sample ID: _____

Record the additional sample data.

17. Click the **Addtl Sample Data** tab. The system displays the Addtl Sample Data panel.

18. In the **Smpld From** field, type **Roadway**.

19. **Save**.

Record the contract sample data

20. Click the **Contract** tab. The system displays the Contract panel.

21. On the toolbar, click the **New** button. The system displays the Select Contract/Material Information window.

22. Using the right mouse button, click on the **Contract ID** field.

23. From the object menu, select the **Search** choice.

24. In the **Contract ID** column, double-click **TRN349**. The system displays information about the associated items.

25. In the **Item Code** column, select **303-01**.

26. Click **OK**. The system closes the Select Contract/Material Information window and displays the selected item in the Contract panel.

Tip! Do not record a value in the Represented Qty field. Sample and testing requirements for this material on this item are satisfied by the frequency of samples, not represented quantity.

27. **Save**.

Record the other sample data.

28. Click the **Other** tab. The system displays the Other panel.
29. On the keyboard, press the **space bar**. The system displays Destination Lab in the Type field.
30. For the Destination Lab, using the right mouse button, click on the **ID** field.
31. From the object menu, select the **Search** choice. The system displays the Search Window window
32. In the **Destination Lab** column, double-click **DEST – TDOT Field Testing**. The system closes the Search Window window.
33. **Save**.

TIP!
IF THERE IS NOT A NEW ROW WHEN YOU OPEN THIS PANEL, YOU MAY HAVE TO CLICK IN WINDOW BEFORE CLICKING NEW.

Assign the necessary tests.

34. On the toolbar, click the **Open Assign Tests** button. The system displays the Assign Sample Tests window.

Note: The message on the window warns that assigning tests to the sample will lock the sample. If uncertain about the tests needed for the sample, click the Cancel button.
35. Click **More**.

Note: T310 - Nuclear Density/Moisture of Soil and Agg. is a default test so no further action is required.
36. Click **Save Tests**. The system closes the Assign Sample Tests window, makes the Open Assign Tests button unavailable, changes the sample status to Received, and displays the Basic Sample Data panel.

You've created a sample record and assigned tests.



Exercise 9

In this exercise, open LIMS, create and apply a filter, and enter test results into a material test template.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD – Operations Inspector [INSP]		
Prior Keys	< the sample ID created in the previous exercise >		
Scenario	FIELD – Operations Inspector enters test results for density.		

1. On the toolbar, click the **Open LIMS** button. SiteManager launches the LIMS component.
2. On the **Navigation Panel**, double-click the **Enter Test Results** icon. LIMS displays the Enter Results window.
3. In the **Test Queue Criteria** area, note that the **All My Lab Units** choice has been selected.
4. In the **Filter Criteria** area, create a filter where **Sample ID Contains < the last 6 digits of the sample ID created in the last exercise >**.
5. Click the **Apply** button. The system displays the tests associated to sample for the FIELD - Operations Inspector to perform in the field.

Enter the test results for the T310 test.

6. In the **Test Description** column, select the row for **T310 – Nuclear Density / Moisture of Soil and Agg.** The system displays the material test template in the lower pane or Test Data window.
7. On the Test Data window, click the **Maximize** button to view more of the template at once.

T310 Nuclear Density / Moisture of Soil and Agg.

In Spec
 Out of Spec
 No Spec

Lot #

Direction

Width ft.

Method of Mixing

Required Average Density

Nuclear Gauge No.	14700079 - Nuclear Gauge (1707)				
Lot Description	0+00 - 75+00, 7500', 1st lift, 10,000 Sq Yds				
Test No.	6	2	3	4	5
Station	100+00	110+00	120+00	130.00	140+00
Offset (ft from CL)	1	3	6	9	11
Lift/Feet Below Grade	2	2	2	2	2
Moisture Standard Count	12	12	12	12	12
Moisture Count	3	3	3	3	3
Moisture Count Ratio	0.3	0.3	0.3	0.3	0.3
Test/Probe Depth (in.)	6.0	6.0	6.0	6.0	6.0
Density Standard Count	3,400	3,400	3,400	3,400	3,400
Density Count	0	0	0	0	0
Density Count Ratio	0.0	0.0	0.0	0.0	0.0
Unit Weight Wet (pcf)	141.0	141.0	141.0	141.0	141.0
Moisture (pcf)	0.0	0.0	0.0	0.0	0.0
Percent Moisture	0.0	0.0	0.0	0.0	0.0
Unit Weight Dry (pcf)	141.0	141.0	141.0	141.0	141.0
Cut Station	0	0	0	0	0
Proctor Sample ID					
Proctor Density	141.0	141.0	141.0	141.0	141.0
Optimum Moisture	6.5	6.5	6.5	6.5	6.5
Percent Compaction	100.0	100.0	100.0	100.0	100.0

Average Percent Compaction

No tests taken due to field conditions

Remarks

Version 2.4 (04-02-15)

Figure 17. LIMS - Enter Test Results Window - Test Data – Detail

Note: The “No tests taken due to field conditions” check box should be selected when placing aggregates that don’t require tests such as maintenance stone, driveways, shoulders, and so on.

8. Complete the following fields on the template with the values provided.

Lot #	1.0
Direction	NB
Width	12.0
Method of Mixing	PUG
Required Average	100
Nuclear Gauge No.	14700079 – Nuclear Gauge (1707)
Lot Description	Mainline 95+00 to 150+00
Test No.	1
Station	100+00
Offset (ft from CL)	1
Lift/Feet Below Grade	2
Moisture Standard	12
Moisture Count	3
Test/Probe Depth (in.)	6.0
Density Standard Count	3,400
Density Count	0
Unit Weight Wet (pcf)	141.0
Moisture (pcf)	0.0
Cut Station	0
Proctor Sample ID	0
Proctor Density	141.0
Optimum Moisture	6.5
Test No.	2
Station	110+00
Offset (ft from CL)	3
Lift/Feet Below Grade	2
Moisture Count	3
Density Count	0
Unit Weight Wet (pcf)	141.0
Moisture (pcf)	0.0
Test No.	3
Station	120.0
Offset (ft from CL)	6
Lift/Feet Below Grade	2
Moisture Count	3
Density Count	0
Unit Weight Wet (pcf)	141.0
Moisture (pcf)	0.0

Test No.	4
Station	130+00
Offset (ft from CL)	9
Lift/Feet Below Grade	2
Moisture Count	3
Density Count	0
Unit Weight Wet (pcf)	141.0
Moisture (pcf)	0.0
Test No.	5
Station	140+00
Offset (ft from CL)	11
Lift/Feet Below Grade	2
Moisture Count	3
Density Count	0
Unit Weight Wet (pcf)	141.0
Moisture (pcf)	0.0

9. On the Test Data window, click the **Restore Down** button.
10. **Save**.
11. Note that the test results are in-spec.
12. In the **Test Completed** column, select the check box.
13. **Save**. The system removes the test from the queue.

Clear the filter and close the window.

14. In the **Filter Criteria** area, to clear the filter, click the **Reset** button. The system displays the remaining tests in the queue.
15. **Close**. The system displays the Navigation Panel window.

You've opened LIMS, created and applied a filter, entered test results into a material test template, and marked it complete.



Exercise 10

In this exercise, progress the test through the Review Tests queue.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	< the sample ID used in the previous exercise >		
Scenario	Field – Operations Inspector reviews the tests results for density.		

1. On the Navigation Panel window, double-click the **Review Tests** icon. The system displays the Review Tests window.
2. In the **Filter Criteria** area, create a filter where **Sample ID Contains < the last 6 digits of the sample ID created in the last exercise >**.
3. Click the **Apply** button.

Review the results for the T310 test.

4. In the **Test Description** column, select **T310 – Nuclear Density / Moisture of Soil and Agg.**
5. In the Test Results window, notice that the system selected the **In Spec** indicator.
6. Confirm the results.
7. From the **Supervisor Action** dropdown list, select **Review Completed.**
8. **Save.** The system removes the test record from the Review Tests queue.

Clear the filter and close the window.

9. In the **Filter Criteria** area, to clear the filter, click the **Reset** button. The system displays the remaining tests in the queue.
10. **Close**. The system displays the Navigation Panel window.
11. **Exit SiteManager LIMS**. The system displays the Maintain Sample Information window's Basic Sample Data panel.
12. From the **File** menu, select the **Refresh** choice. The system refreshes the record to display the updated status after auto-finalizing the sample.

You've progressed the test through the Review Tests queue.

Review Exercise for Aggregate Field Density

In this exercise, create a sample record of an aggregate sample for a density test.

User ID **jj00001** Password **pass**
Connection **Training Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **Not applicable.**
Scenario **FIELD - Operations Inspector overseeing
the installation of aggregate base material
performs density tests with a nuclear
gauge.**

1. Create a new sample with the following information:

Note: The step-by-step instruction has been removed.

Sample Date	10/21/15
Smpl Type	Acceptance
Acpt Meth	Acceptance
Material	303.01.001 - Base (Mineral Aggregate, Type A)
Sampler	jj00001
Geog Area	Region 2 - Overton
Contract ID	TRN349
Line Item Desc	MINERAL AGGREGATE, TYPE A BASE, GRADING D
Destination Lab	DEST - TDOT Field Testing
Test to be Assigned	T310 - Nuclear Density/Moisture of Soil & Agg

2. View the test results entered for a similar sample, **jj000011485164900**.
3. Mark the **T310** test complete on sample **jj000011485164900**.

You've created a sample record of an aggregate sample for a density test, viewed test results and marked the test complete.

Review Exercise for Aggregate at the Plant

In this exercise, create a sample record of an aggregate sample for a density test.

User ID **jj00001** Password **pass**
 Connection **Training Server**
 Group Name **FIELD - Operations Inspector [INSP]**
 Prior Keys **Not applicable.**
 Scenario **FIELD - Operations Inspector at the plant creates a sample for T27 – Sieve Analysis of Fine and Coarse Aggregates and T255 – Total Evaporable Moisture of Aggregate by Drying.**

1. Create a new sample with the following information:

Note: The step-by-step instruction has been removed.

Sample Date	10/21/15
Smpl Type	Acceptance
Acpt Meth	Acceptance
Material	303.01.001 - Base (Mineral Aggregate, Type A)
Sampler	jj00001
P/S	Livingston Limestone
Geog Area	Region 2 - Overton
Contract ID	TRN349
Line Item Desc	MINERAL AGGREGATE, TYPE A BASE, GRADING D
Destination Lab	DEST - TDOT Contractor Lab
Test to be Assigned	T255 – Total Evaporable Moisture of Aggregate by Drying
	T27 – Sieve Analysis of Fine and Coarse Aggregates

2. On the Enter Test Results window, view the test results entered for a similar sample, **jj00011167I134306**.
3. Mark the **T27** and **T255** tests complete on sample **jj00011167I134306**.
4. If you created a filter, reset it.
5. **Exit SiteManager LIMS and Exit SiteManager.**

You've created a sample record of an aggregate sample for plant tests, viewed test results and marked the tests complete.

IMPORTANT!

THE 11TH CHARACTER IN THE SAMPLE ID, jj00011167**I**134306, IS A CAPITAL LETTER 'I,' NOT THE NUMBER '1.'

TIP!

CREATE A FILTER WHERE SAMPLE ID CONTAINS 134306.

Creating and Completing a Sample Record for Asphalt at the Plant



Exercise 11

In this exercise, create a sample record of a material and record the sample data.

User ID **jj00001** Password **pass**
Connection **Training Server**
Group Name **FIELD – Operations Inspector [INSP]**
Prior Keys **Not applicable.**
Scenario **Yesterday, the FIELD - Operations Inspector sampled asphalt mix from a truck at the asphalt plant and performed the necessary tests in the contractor's lab, but did not have time to create the sample record. Today, the inspector creates the sample record in SiteManager.**

1. Start and log onto SiteManager as user **jj00001** *while connected in server mode.*
2. On the **Main Panel**, double-click the **Materials Management** icon.
3. On the **Materials Management** panel, double-click the **Sampling and Testing** icon.
4. On the **Sampling and Testing** panel, double-click the **Sample Information** icon. SiteManager displays the Maintain Sample Information window.
5. Create a sample record with the following information on the Basic Sample Data panel:

Sample Date	<yesterday's date>
Smpl Type	Acceptance
Acpt Meth	Acceptance
Material	411.03.001
Sampler	jj00001
P/S	Highways Inc. – Allgood Asphalt Mix
Geog Area	Region 2 - Overton
Repr Qty	1000.0

6. Record the sample ID: _____

7. Record the following information on the Addtl Sample Data panel:

Smpld From	Truck BB1, Rdm Nbr 67, Load 4
Design Type	Marshall
Mix ID	2140075
Plant ID	27100005

8. Record the following information on the Contract panel:

Contract	TRN349
Item Code	411-01.10

Important! Do not enter a Represented Qty!

9. Record the following information on the Other panel:

ID	DEST – TDOT Contractor Lab
-----------	-----------------------------------

10. Add the following tests:

D4867 – Tensile Strength Ratio
M007 – 10 Minute Boil Test
M012 – LOI / Loss On Ignition Test
T166-245 – Bulk Specific Gravity, Stability and Flow
T209 – Theoretical Maximum Specific Gravity of HMA

11. Click the **Save Tests** button.

You've created an asphalt sample record at the plant.



Exercise 12

In this exercise, open LIMS, create and apply a filter, and enter test results into material test templates.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	Not applicable.		
Scenario	The FIELD - Operations Inspector enters the results of the LOI / Loss On Ignition test into the M012 test template, the Asphalt Content by Extraction/Furnace test into the T164EII test template, and the AC Content and Sieve Analysis of Asphalt Mix test into the T27/30 test template.		

1. On the toolbar, click the **Open** button. The system displays the Select Sample window.
2. In the **Sample ID** column, click the column header. The system makes the Find field available.
3. In the **Find** field, type **95148**. The system selects the first row with that combination of numbers.
4. Did it select the sample record **jj00001144F095148**? _____
5. If Yes, continue.
If No, scroll to and select sample ID **jj00001144F095148**.
6. Click **OK**. The system displays the Basic Sample Data panel.
7. On the toolbar, click the **Open LIMS** button. SiteManager launches the LIMS component.
8. On the **Navigation Panel**, double-click the **Enter Test Results** icon. LIMS displays the Enter Results window.
9. In the **Test Queue Criteria** area, note that the **All My Lab Units** choice has been selected.
10. In the **Filter Criteria** area, create a filter where **Sample ID Contains 95148**.
11. Click the **Apply** button. The system displays the tests associated to sample jj00001144F095148 for the FIELD - Operations Inspector to perform in the TDOT Contractor Lab.

Note: This is an instructor-created sample that includes D4867, M007, M012, T164EII-T308, T166-245, T209 and T27_30. It is not the sample created during the last exercise. Several of the templates have been completed and moved through the LIMS queues to save time.

Enter the test results for the M012 test.

12. In the **Test Description** column, select the row for **M012 - LOI / Loss On Ignition Test**. The system displays the material test template in the lower pane or Test Data window.
13. On the Test Data window, click the **Maximize** button to view more of the template at once.

The screenshot shows a data entry window titled "M012 LOI / Loss On Ignition Test". It includes a "Print" button and a legend for "In Spec", "Out of Spec", and "No Spec". The data fields are as follows:

Number of Crucibles	1
Mass Crucible and Sample (before ignition)	2723.3 g
Mass Crucible	1431.2 g
Mass Test Sample	1292.1 g
Mass Crucible and Sample (after ignition)	2612.2 g
Mass Loss	111.1 g

Below these are "Combined Masses from above":

Mass of Test Samples	1292.1 g
Mass of Losses	111.1 g

The calculation for % Loss on Ignition (L. O. I.) is shown as:

$$\% \text{ Loss on Ignition (L. O. I.)} = \frac{\text{Mass of Losses}}{\text{Mass of Test Samples}}$$

The resulting values are:

% L. O. I.	8.6 %
Target LOI Value From Mix Design	6.3 %
Total Deviation from Tolerance	2.3 %
% Deviation Exceeding Tolerance*	0.3 %

There are also fields for "min" (0) and "max" (2) for the deviation. A "Remarks" field is at the bottom.

Figure 10. LIMS - Enter Test Results Window - Test Data - Detail

14. Complete the following fields on the template with the values provided.

Number of Crucibles	1
Mass Crucible and Sample (before ignition)	2723.3
Mass Crucible	1431.2
Mass Crucible and Sample (after ignition)	2612.2
Target LOI Value From Mix Design	6.3

15. On the Test Data window, click the **Restore Down** button.
16. **Save.**
17. Note that the test results are out-of-spec.
18. In the **Test Completed** column, select the check box.
19. **Save.** The system removes the test from the queue.

Enter the test results for the T164EII test.

20. In the **Test Description** column, select the row for **T164EII- T308 - Asphalt Content By Extraction/Furnace**. The system displays the material test template in the lower pane or Test Data window.
21. On the Test Data window, click the **Maximize** button to view more of the template at once.

Figure 12. LIMS - Enter Test Results Window - Test Data – Detail

22. Complete the following fields on the template with the values provided.

Equipment	99999999 – Contractor’s Equipment
Extraction or Furnace	T164EII Extraction
Wt. of Container	600.0
Wt. of Container + Sample	2200.0

Wt. of Filter Paper	12.0
Wt. of Filter Aid	100.0
Filt Aid + Paper + (-200) Mtl	220.0
Wt. of Extracted Agg + Pan	1600.0
Wt. of Pan	200.0

23. On the Test Data window, click the **Restore Down** button.

24. **Save.**

Note that the test results are no-spec.

25. In the **Test Completed** column, select the check box.

26. **Save.** The system removes the test from the queue.

Finally, enter the test results for the T27_30 test.

27. In the **Test Description** column, select the row for **T27_30 - Sieve Analysis of Asphalt Mix**. The system displays the material test template in the lower pane or Test Data window.

28. On the Test Data window, click the **Maximize** button to view more of the template at once.

<p>WARNING! USERS MUST MANUALLY SELECT THE TEST STATUS IN THE TEMPLATE MONITOR FIELD FOR THIS TEMPLATE.</p>

T27/30 Sieve Analysis of Asphalt Mix

In Spec
 Out of Spec
 No Spec

Print

Initial Weight g

Upon entering results and before marking the testing complete, please select In Spec, Out of Spec or No Spec

Sieve Size	Weight Retained	Actual % Passing	Actual % Retained
2.0000 in (2)	<input type="text" value="0.0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %
1.5000 in (1 1/2)	<input type="text" value="0.0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %
1.2500 in (1 1/4)	<input type="text" value="0.0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %
1.0000 in (1)	<input type="text" value="0.0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %
0.7500 in (3/4)	<input type="text" value="0.0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %
0.6250 in (5/8)	<input type="text" value="0.0"/> g	<input type="text" value="100.0"/> %	<input type="text" value="0.0"/> %
0.5000 in (1/2)	<input type="text" value="32.5"/> g	<input type="text" value="97.4"/> %	<input type="text" value="2.6"/> %
0.3750 in (3/8)	<input type="text" value="197.3"/> g	<input type="text" value="84.2"/> %	<input type="text" value="15.8"/> %
No. 004	<input type="text" value="470.2"/> g	<input type="text" value="62.4"/> %	<input type="text" value="37.6"/> %
No. 008	<input type="text" value="702.4"/> g	<input type="text" value="43.9"/> %	<input type="text" value="56.1"/> %
No. 016	<input type="text" value="0.0"/> g	<input type="text" value="0.0"/> %	<input type="text" value="0.0"/> %
No. 030	<input type="text" value="974.9"/> g	<input type="text" value="22.1"/> %	<input type="text" value="77.9"/> %
No. 050	<input type="text" value="1034.5"/> g	<input type="text" value="17.3"/> %	<input type="text" value="82.7"/> %
No. 100	<input type="text" value="1151.6"/> g	<input type="text" value="7.9"/> %	<input type="text" value="92.1"/> %
No. 200	<input type="text" value="1180.6"/> g	<input type="text" value="5.6"/> %	<input type="text" value="94.4"/> %

Percent AC %

DAR

Pan Weight g

Additional (-) minus 200 Matl g

Total Material Passing #200 %

Remarks

Version 2.4 (03-31-14)

TIP!

BE SURE TO TAB OUT OF THE INITIAL WEIGHT FIELD, THE WEIGHT RETAINED FIELDS WILL NOT BECOME EDITABLE UNTIL THE SYSTEM REGISTERS THE INITIAL WEIGHT VALUE.

BY DEFAULT, MATERIAL TEST TEMPLATES SHOW .0 IN SOME FIELDS WHEN NO VALUE HAS BEEN ENTERED. WHILE TESTING, IF A ZERO VALUE IS FOUND FOR A FIELD, USERS MUST TYPE 0.0 TO STORE THE VALUE IN THE SYSTEM AND PROPERLY PERFORM RELATED CALCULATIONS. THE TEMPLATE WILL CONTINUE TO DISPLAY .0 IN THE FIELD.

Figure 13. LIMS - Enter Test Results Window - Test Data – Detail

29. Complete the following fields on the template with the values provided.

Initial Weight	1251.0
Weight Retained 0.6250 in (5/8)	0.0
Weight Retained 0.5000 in (1/2)	32.5
Weight Retained 0.3750 in (3/8)	197.3
Weight Retained No. 004	470.2
Weight Retained No. 008	702.4
Weight Retained No. 030	974.9
Weight Retained No. 050	1034.5
Weight Retained No. 100	1151.6
Weight Retained No. 200	1180.6
Percent AC	5.75
Pan Weight	1185.6

30. User should compare the information on T27/30 to the Job Mix Formula (JMF) for this contract to ensure the test results fall within the specified range.
31. **Warning!** *The T27_30 - Sieve Analysis of Asphalt Mix template requires that the user manually select In Spec or Out of Spec to indicate the status of the recorded results. If any field label remains red after entering results, select Out of Spec.*

Sieve Analysis of Asphalt Mix

In Spec
 Out of Spec
 No Spec

Upon entering results and before marking the testing complete, please select In Spec, Out of Spec or No Spec

Figure 13. LIMS - Enter Test Results Window - Test Data – T27/30 Template Status - Detail

32. In the **Template Monitor** field, manually select **In Spec**.

Note: The system hides the “Upon entering results and before marking the testing complete, please select In Spec, Out of Spec or No Spec” text after selecting the status.

33. On the Test Data window, click the **Restore Down** button.
34. **Save**.
35. In the **Test Completed** column, select the check box.
36. **Save**. The system removes the test from the queue.

Clear the filter and close the window.

37. In the **Filter Criteria** area, to clear the filter, click the **Reset** button. The system displays the remaining tests in the queue.
38. **Close**. The system displays the Navigation Panel window.

You've entered test results into material test templates and marked them complete.

Using Reports

After entering results into the T27/30 test template, the RR061 BOE report, *Asphalt Plant Density*, can be run. This report is important because this is how Office Staff finds/calculates the AC content and gradations deduction which they “install” against the appropriate line item.

Sieve Size		Job Mix Formula	Actual Percent Passing per Sample				Average Deviation	Pay Factor	Total Deduction (\$ per Sieve Size)
2.0000 inch(es) [2"]									
1.5000 inch(es) [1-1/2"]									
1.2500 inch(es) [1-1/4"]									
1.0000 inch(es) [1"]									
.7500 inch(es) [3/4"]									
.6250 inch(es) [5/8"]		100.0	100.0			0.00	1.00	0.00	
.5000 inch(es) [1/2"]		99.0	99.1			0.10	1.00	0.00	
.3750 inch(es) [3/8"]		89.0	86.0			3.00	1.00	0.00	
No. 004		65.0	50.0			15.00	0.80	0.00	
No. 008		46.0	49.0			3.00	1.00	0.00	
No. 016									
No. 030		24.0	17.5			6.50	0.80	0.00	
No. 050		14.0	16.0			2.00	1.00	0.00	
No. 100		9.2	10.0			0.80	1.00	0.00	
No. 200		6.4	8.0			1.60	1.00	0.00	
Asphalt Content (%)		5.70	5.55			0.15	1.00	0.00	
Dust-to-Asphalt Ratio		1.13	1.44			0.31			
REMARKS : j0413515CF141510 - No Remarks							Daily Deduction	\$0.00	

Figure 18. BOE Report – Asphalt Plant Density (RR061)

Other reports important to Operations in this area are the RR016 BOE report, *Mix Designs - Approved*, and the RR070 BOE report, *Job Mix Formula*.

Operations will use RR016 BOE report, *Mix Designs - Approved* to find the mix.

Mix ID	Material	Producer/ Supplier	Approval Date	Termination Date	Associated Contracts
MAR - Marshall					
1140022	411.03.011 - 411-E (Shoulders) Bit PM, PG 64-22	Duracap Asphalt Paving - Knoxville Asphalt Mix	01/19/2015	01/02/2015	CNE123
1150085	411.03.001 - 411-D Bit PM, PG-64 22	Rogers Group - Knoxville Candora Ave Asphalt Mix	01/28/2015	12/31/2015	CNE123
1150304	411.03.001 - 411-D Bit PM, PG-64 22	Rogers Group - Harriman Quarry Rd Asphalt Mix	03/21/2015	12/31/2017	CNE123

Figure 19. BOE Report – Mixed Designs Approved (RR016) – (initial page)

STATE OF TENNESSEE
DEPARTMENT OF TRANSPORTATION
Mix Designs - Approved Report



Mix ID	Material	Producer/ Supplier	Approval Date	Termination Date	Associated Contracts
PCC - PCC					
15 065MB	604.01.001A - Class A, Concrete Mix	Concrete Materials Inc - Morristown Ready Mix	04/16/2015	12/31/2049	CNE123
MFB14 376	604.01.001D - Class D, Concrete Mix	Sequatchie Concrete - South Pittsburg Ready Mix	04/16/2015	12/31/2049	CNE123

Figure 20. BOE Report – Mixed Designs Approved (RR016) – (final page)

Operations will run RR070 BOE report, *Job Mix Formula* to view the mix design details.

Material		Producer/Supplier		Percent Used
903.11.097	Agg Asph (Slag)	Tube City IMG - Knoxville Aggregate		7.6
903.11.103	Agg Surf 903_11 Type 2 (Limestone)	Rogers Group - Englewood Aggregate		58.7
903.11.106	Agg Asph (Natural Sand)	Newport Sand & Gravel		14.2
903.23.155	RAP (Processed minus 1/2")	Rogers Group - Knoxville Candora Ave Asphalt Mix		11.4
903.23.160	Recycled Asphalt Shingles (RAS)	TN Shingle Recycling - Murfreesboro (RAS)		2.8
904.01.001	PG 64 22 Asphalt Cem Hot Mix Asphalt	Phillips 66 - Knoxville Asp Cement		5.4
Total				100.0
Asphalt Cement:		PG 64 22 Asphalt Cem Hot Mix Asphalt	Optimum AC Content:	5.7
Anti-strip Additive:		Am-Mazz	Anti-strip Supplier:	Am-Mazz Products
AC Contribution		Virgin AC: 4.56	RAP AC: 1.14	Percent Virgin AC: 80.00
Asphalt Specific Gravity:		2.438	Dust to Asphalt Ratio:	1.13
% Fracture Face on Coarse Aggregate:		n/a	% Glassy Particles on Coarse Aggregate: n/a	
Theoretical Gravity of RAP1:		2.564	Effective Gravity of Aggregate:	
Theoretical Gravity of RAP2:				
Theoretical Gravity of Mix:		2.546	T.S.R:	89.1
L.O.I.	13.5	Ignition Oven Correction Factor:	0.72	Warm Mix? No
Lab Temperature		Plant Temperature		
Mixing Temperature (+- 6°F): 305		Mixing Temperature Range (°F): 270°F ≤ T ≤ 310°F		
Lab Compaction Temperature (+- 6°F): 270		Delivery Temperature Range (°F): 270°F ≤ T ≤ 310°F		

V10 - TSMR 'END OF REPORT'

RR070 Page: 1

Figure 21. BOE Report – Job Mix Formula (RR070)



Exercise 13

In this exercise, progress the test through the Review Tests queue.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	jj00001144F095148 (sample ID)		
Scenario	FIELD - Operations Inspector reviews the entered test results for all tests performed in a contractor's lab or in the field.		

1. Double-click the **Review Tests** icon. The system displays the Review Tests window.
2. In the **Filter Criteria** area, create a filter where **Sample ID Contains 95148**.
3. Click the **Apply** button.
4. In the **Sample ID** column, verify that all rows pertain to sample record **jj00001144F095148**.

Review the results for the D4867 test.

5. In the **Test Description** column, select **D4867 – Tensile Strength Ratio**.
6. In the Test Results window, notice that the system selected the **In Spec** indicator.
7. Is this sample a candidate to auto-finalize based on this test's test results? _____
8. From the **Supervisor Action** dropdown list, select **Review Completed**. *The system will authorize this sample automatically after all tests for the sample are marked as Review Completed in the Review Tests queue if and only if all tests on this sample are set to auto-finalize and are in-spec or no-spec.*
9. **Save**. The system removes the test record from the Review Tests queue.

THE SYSTEM WILL AUTHORIZE A SAMPLE AUTOMATICALLY IF IT MEETS THE FOLLOWING CONDITIONS:

- ALL TESTS ARE MARKED AS REVIEW COMPLETED IN REVIEW TEST QUEUE

- ALL TESTS ARE SET TO AUTO-FINALIZE

- ALL TESTS ARE IN-SPEC OR NO-SPEC

Review the results for the T209 test.

10. In the **Test Description** column, select **T209 - Theoretical Maximum Specific Gravity of HMA**.
11. In the Test Results window, notice that the system selected the **No Spec** indicator.
12. Is this sample a candidate to auto-finalize based on this test's test results? _____
13. From the **Supervisor Action** dropdown list, select **Review Completed**. *The system will authorize this sample automatically after all tests for the sample are marked as Review Completed in the Review Tests queue if and only if all tests on this sample are set to auto-finalize and are in-spec or no-spec.*
14. **Save**. The system removes the test record from the Review Tests queue.

Review the results for the M007 test.

15. In the **Test Description** column, select **M007 – 10 Minute Boil Test**.
16. In the Test Results window, notice that the system selected the **Out of Spec** indicator.
17. Is this sample a candidate to auto-finalize based on this test's test results? _____
18. From the **Supervisor Action** dropdown list, select **Review Completed**. *Since the test results for M007 are out-of-spec, this sample record will not auto-finalize. All test results must pass before a sample record will auto-finalize.*
19. **Save**. The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.

Review the results for the T166-T245 test.

20. In the **Test Description** column, select **T166-245 - Bulk Specific Gravity, Stability and Flow.**
21. In the Test Results window, notice that the system selected the **In Spec** indicator.
22. From the **Supervisor Action** dropdown list, select **Review Completed.**
23. **Save.** The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.

Review the results for the M012 test.

24. In the **Test Description** column, select **M012 – LOI / Loss On Ignition Test.**
25. In the Test Results window, does the template indicate that the test results are in-spec, out-of-spec or no-spec? _____
26. From the **Supervisor Action** dropdown list, select **Review Completed.**
27. **Save.** The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.

Review the results for the T164EII-T308 test.

28. In the **Test Description** column, select **T164EII-T308 - Asphalt Content By Extraction/Furnace.**
29. In the Test Results window, does the template indicate that the test results are in-spec, out-of-spec or no-spec? _____
30. From the **Supervisor Action** dropdown list, select **Review Completed.**
31. **Save.** The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.

Review the results for the T27_30 test.

32. In the **Test Description** column, select **T27_30 – Sieve Analysis of Asphalt Mix**.
33. In the Test Results window, does the template indicate that the test results are in-spec, out-of-spec or no-spec? _____
34. From the **Supervisor Action** dropdown list, select **Review Completed**.
35. **Save**. The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.

Clear the filter and prepare for the next exercise.

36. In the **Filter Criteria** area, click the **Reset** button.
37. **Close**. The system displays the Navigation Panel.

You've progressed the tests through the Review Tests queue.

Authorizing Samples

Use the Review Samples window to authorize samples. In this window, authorize the sample while verifying the acceptance method and providing the appropriate sample status.

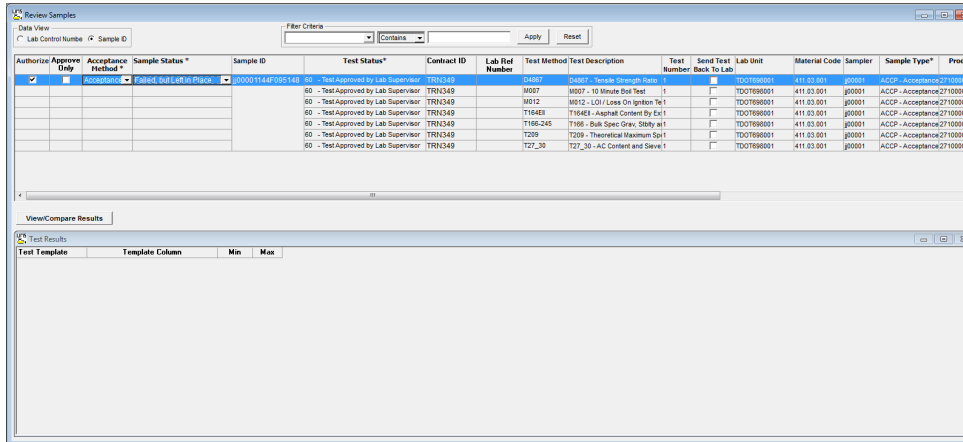


Figure 22. Review Samples Window



Exercise 14

In this exercise, authorize the sample record in the Review Samples queue.

User ID **jj00001** Password **pass**
 Connection **Training Server**
 Group Name **FIELD - Operations Inspector [INSP]**
 Prior Keys **jj00001144F095148 (sample ID)**
 Scenario **FIELD - Operations Inspector authorizes the sample.**

Review the sample record to authorize the sample that did not auto-finalize because of out-of-spec results.

1. On the **Navigation Panel**, double-click the **Review Samples** icon. The system displays the Review Samples window.
- Note:** There is no need to apply a filter. This is the only sample available to review.
2. In the **Authorize** column, select the checkbox.
 3. In the **Sample Status** column, from the dropdown list, select **Failed, but Left in Place**.

SAMPLE STATUS DESCRIPTIONS INCLUDE:

- **COMP - COMPLETED** - TESTS PASSED AND SAMPLE WILL COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.
- **CNTR - COMPLETED, WITH NO TESTS REQUIRED** – NO TESTS WERE INVOLVED, BUT SAMPLE WILL COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.
- **FLIP - FAILED, BUT LEFT IN PLACE** - TESTS FAILED, BUT THE MATERIALS WERE LEFT IN PLACE. SAMPLE STATUS WILL COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.
- **FAIL - FAILED** - TESTS FAILED AND SAMPLE WILL NOT COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.
- **VOID - VOIDED** - NOT USING THE SAMPLE. SAMPLE WILL NOT COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.

4. **Save.** The system clears all test records for the selected sample record from the Review Samples queue.

Tip! To view the sample and test results now, use the View-Only Sample Information window, the Maintain Sample Information window, or the *Sample Details and Tests Results Report* (a custom report).

5. **Close.** The system displays the Navigation Panel window.

You've authorized the sample in the Review Samples queue.

Viewing Test Results and Sample Records at Any Time

Although the following methods can be used at *any time* during the lifecycle of a test, *after* the test and sample record goes through all of the LIMS queues, these are the *only* ways to view test results:

- In SiteManager, Maintain Sample Information window's Tests panel > Services menu > Enter/View Test Data
- In LIMS, View-Only Sample Information window's Test Results panel
- In BOE, Report *RR012 – Sample Details and Test Results*



Exercise 15

In this exercise, view test results from the View-Only Sample Information window and the Maintain Sample Information window.

User ID **jj00001** Password **pass**
Connection **Training Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **jj00001144F095148 (sample ID)**
Scenario **FIELD - Operations Inspector views test results.**

View test results from the View-Only Sample Information window's Test Results panel.

1. In LIMS, on the Navigation Panel window, double-click the **View-Only Sample Information** icon. The system displays the Open Sample Records window.

Field	Operator	Value	And/Or
Sample ID	Contains	95148	

Figure 23. View-Only Sample Information Window – Open Sample Records

2. In the **Filter** area, click the **New Filter** button. The system displays a Save New Filter As window.
3. In the **Save New Filter As** field, type **Sample ID Contains**.
4. Click **OK**.
5. Click the **Add Criteria** button. The system displays a blank row.
6. In the **Field** dropdown list, select **Sample ID**.

7. In the **Operator** dropdown list, select **Contains**.
8. In the **Value** field, type **95148**.
9. Click the **Open Records** button.
10. In the **Sample ID** column, verify that the system displayed the **jj00001144F095148** sample.
11. Click the **Test Results** tab. The system displays the Test Results panel.
12. View all test results for the sample in grid view.

Sample Details	Contract Details	Other Details	Sample Receive	Tests Assigned	Test Status	Test Results
Test Template	Template Column	Min	Max	jj00001144F095148 / 1		
D4867	Spec Status(IN=1 OUT=2 NONE=3)			In Spec		
D4867	Remarks					
D4867	Compaction Method			1		
D4867	Effort			31		
D4867	Max Specific Gravity			2.532		
D4867	Diameter Pill 1			4.0		
D4867	Thickness Pill 1			2.50		
D4867	Dry mass in air Pill 1			1215.3		
D4867	SSD mass Pill 1			1221.2		
D4867	Mass in water Pill 1			706.9		
D4867	Bulk Sp. Gr. Pill 1			2.363		
D4867	% Air Void Pill 1	6	8	6.7		
D4867	Condition Specimen Pill 1			1		
D4867	Saturated SSD Mass Pill 1			1236.0		
D4867	% Saturation Pill 1	55	80	60.3		
D4867	Conditioned Thickness Pill 1			2.50		
D4867	Cond Thickness Pill 1 Comp			9.99		
D4867	Conditioned SSD Mass Pill 1			0		
D4867	Cond Mass in Water Pill 1			0		
D4867	Load Pill 1			2150		

Figure 24. View-Only Sample Information Window – Test Results Panel

13. **Exit SiteManager LIMS.**
14. The system displays the Maintain Sample Information window.

View test results from the Maintain Sample Information window's Tests panel.

15. In SiteManager, on the Maintain Sample Information window, click the **Tests** tab. The system displays the Tests panel.
16. In the **Test Method** column, select **D4867**.
17. From the **Services** menu, select **Enter/View Test Data**. The system displays the Material Test Template Usage window.

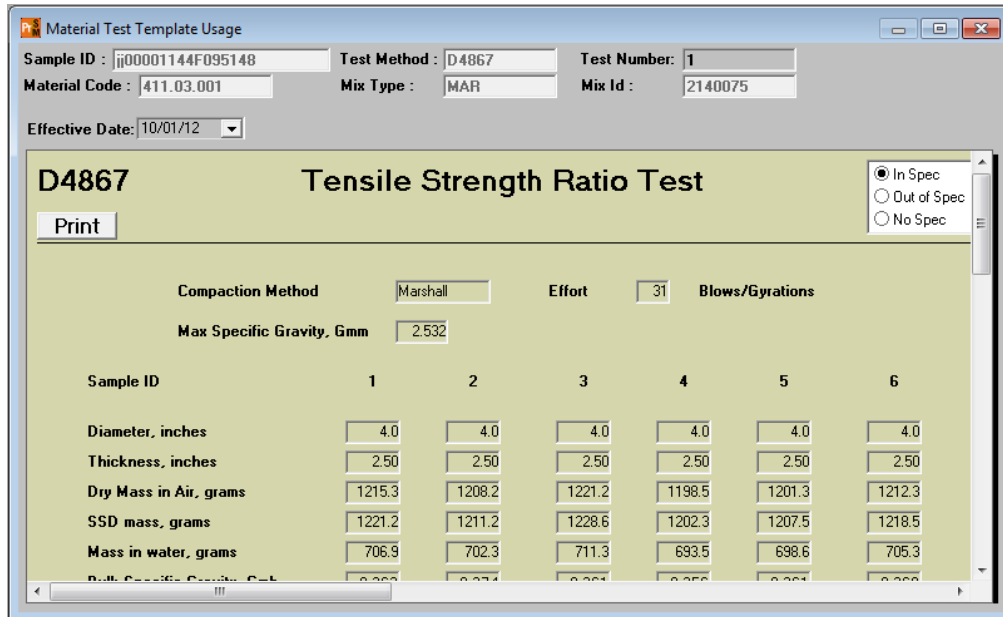


Figure 25. Material Test Template Usage Window

18. Scroll to view the test results.
19. **Close**. The system displays the Maintain Sample Information window's Tests panel.
20. **Close**. The system displays the Sampling and Testing panel.

You've viewed test results from the Maintain Sample Information window.

Locating Sample Records in SiteManager

Besides the basic filter, sort and find features available from many windows, use the Find Sample Parameters window to search for sample records based on specific criteria. This window provides the option to display a list of sample records based on any combination of the following fields: Geographic Area, Sampled By, Material Code, Producer/Supplier Code, Sample Date, Contract ID (then by Project or Proposal Line Nbr and then by Line Item), and Item Code.

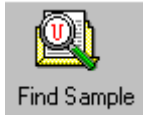
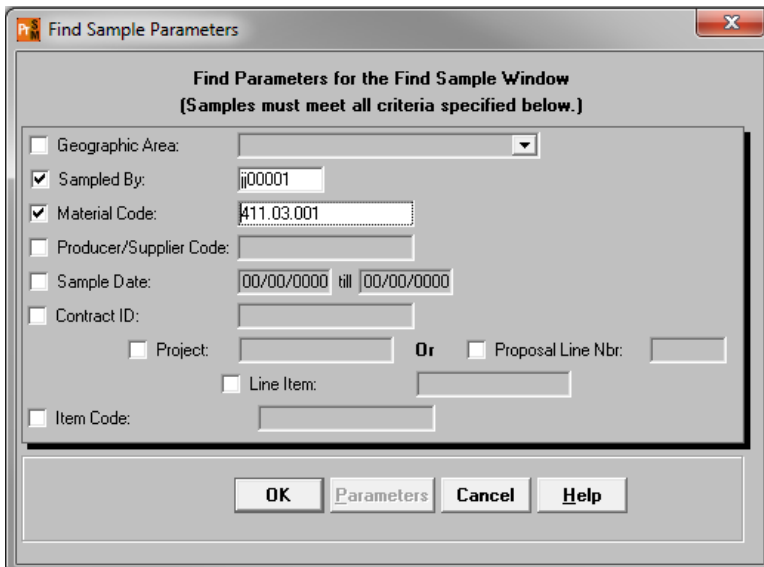


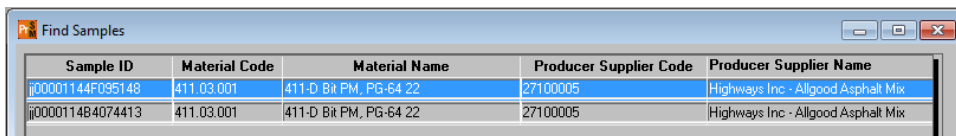
Figure 26. Find Sample Icon

A screenshot of the "Find Sample Parameters" dialog box. The title bar says "Find Sample Parameters". The main text reads "Find Parameters for the Find Sample Window (Samples must meet all criteria specified below.)". There are several input fields with checkboxes:

- Geographic Area: [dropdown menu]
- Sampled By: [text box with "jj00001"]
- Material Code: [text box with "411.03.001"]
- Producer/Supplier Code: [text box]
- Sample Date: [text box "00/00/0000" till [text box "00/00/0000"]]
- Contract ID: [text box]
- Project: [text box] Or Proposal Line Nbr: [text box]
- Line Item: [text box]
- Item Code: [text box]

At the bottom are buttons for "OK", "Parameters", "Cancel", and "Help".

Figure 27. Find Sample Parameters Window

A screenshot of the "Find Samples" window showing a table of search results.

Sample ID	Material Code	Material Name	Producer Supplier Code	Producer Supplier Name
jj00001144F095148	411.03.001	411-D Bit PM, PG-64 22	27100005	Highways Inc - Allgood Asphalt Mix
jj000011484074413	411.03.001	411-D Bit PM, PG-64 22	27100005	Highways Inc - Allgood Asphalt Mix

Figure 28. Find Samples Window



Exercise 16

In this exercise, find a sample record.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	Not Applicable		
Scenario	FIELD - Operations Inspector locates all sample records for material code 411.03.001 where Bailey Morgan was the sampler.		

1. On the Sampling and Testing panel, double-click the **Find Sample** icon. The system displays the Find Sample Parameters window.
2. Click the **Sampled By** checkbox. The system makes the Sampled By field searchable.

Add criteria.

3. In the **Sampled By** field, right-click and select **Search**. The system displays the Search Window window.
4. In the **Inspector Name** column, double-click **Morgan, Bailey**.
5. Click the **Material Code** checkbox. The system makes the Material Code field searchable.
6. In the **Material Code** field, right-click and select **Search**. The system displays the Search Window window.
7. To sort the list, click the **Material Code** column header.
8. In the **Material Code** column, scroll to and double-click **411.03.001**.
9. Click **OK**. The system displays the Find Samples window with a list of the sample records that meet the specified criteria.

View the sample record.

10. In the **Sample ID** column, select **jj00001144F095148**.

Note: Double-clicking the row does not open the record as in other windows.

11. From the **Services** menu, select **View Sample**. The system displays the desired sample record in the Maintain Sample Information window.

You've found all the sample records for samples of a material and sampled by an inspector.

Creating a Sample Record for Asphalt Field Density



Exercise 17

In this exercise, create a sample record, assign tests, enter test results and review the tests.

User ID **jj00001** Password **pass**
Connection **Training Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **jj00001144F095148**
Scenario **Asphalt material has been tested at the plant, delivered to job site and placed. FIELD – Operations Inspector has performed the density test and will now enter sample record and test results.**

1. On the toolbar, click **New**.
2. Create a sample record with the following information:

Smpl Type	Acceptance
Acpt Meth	Acceptance
Material	411.03.001 (411-D Bit PM, PG64-22)
Sampler	jj00001
P/S	Livingston Limestone
Repr Qty	1437
Geog Area	Region 2 - Overton
Contract ID	TRN349
Line Item Desc	ACS MIX(PG-6422) GRADING D
Destination Lab	DEST - TDOT Field Testing
Test to be Assigned	D2950 - Density of Bituminous Conc in Place by Nuclear Meth

3. Record the sample ID: _____

4. Complete the following fields on the template with the values provided.

Equipment	14700078 – Nuclear Gauge (1706)
No. of Lots	1
Standard Count	2672
Theoretical or Laboratory Density (lb/cu ft)	159.1
Core Correction	9.0
Percent Required Density	92.0
Patching or Turnouts	0.00
Lot No.	1
From Sta	0+00
To Sta	46+00
Lin M (ft)	4600
Width	12
Lift	1
Lane	NB
Test No.	1
Sta No.	6+18
Location	L,EL
Den Count	660
Den Kg/m3 (lb/ft3)	138.2
Test No.	2
Sta No.	11+18
Location	R,WP
Den Count	655
Den Kg/m3 (lb/ft3)	138.7
Test No.	3
Sta No.	24+82
Location	Cent
Den Count	628
Den Kg/m3 (lb/ft3)	141.1
Test No.	4
Sta No.	36+00
Location	L,WP
Den Count	650
Den Kg/m3 (lb/ft3)	139.2

Test No.	5
Sta No.	45+10
Location	R,EL
Den Count	665
Den Kg/m3 (lb/ft3)	137.5
Lot Averages	132.5

5. **Save**
6. In the **Test Completed** column, select the check box.
7. **Save.**
8. If applicable, reset the filter.
9. **Close.** The system closes the Enter Test Results window and displays the Navigation Panel window.
10. Double-click the **Review Tests** icon. The system displays the Review Tests window.
11. Review test and select **Review Completed** from the **Supervisor Action** dropdown list.
12. **Save.**
13. **Close.** The system closes the Review Tests window and displays the Navigation Panel window.

You've run density in the field and recorded them in SiteManager and LIMS.

Review Exercise for Asphalt at the Plant

In this exercise, enter test results for the AC Content and Sieve Analysis of Asphalt Mix into the T27_30 test template and manually select the test template status.

User ID **jj00001** Password **pass**
 Connection **Training Server**
 Group Name **FIELD - Operations Inspector [INSP]**
 Prior Keys **jj00001144F095148**
 Scenario **The FIELD - Operations Inspector at the plant enters the test results into the T27_30 - Sieve Analysis of Asphalt Mix by extracting the AC and running a gradation.**

1. Open the Enter Test Results window.
2. Locate the **T27_30** test on sample **jj00001167I143455**.
3. Complete the following fields on the template with the values provided.

Initial Weight	1251.0
Weight Retained 0.6250 in (5/8)	0.0
Weight Retained 0.5000 in (1/2)	32.5
Weight Retained 0.3750 in (3/8)	197.3
Weight Retained No. 004	470.2
Weight Retained No. 008	702.4
Weight Retained No. 030	974.9
Weight Retained No. 050	1034.5
Weight Retained No. 100	1151.6
Weight Retained No. 200	1180.6
Percent AC	5.75
Pan Weight	1185.6

IMPORTANT!

THE 11TH CHARACTER IN THE SAMPLE ID, jj00001167**I**143455, IS A CAPITAL LETTER 'I,' NOT THE NUMBER '1.'

TIP!

CREATE A FILTER WHERE SAMPLE ID CONTAINS 143455.

4. Are the results **In Spec** or **Out of Spec**? _____
5. In the **Template Monitor** field, manually select the appropriate status.
6. **Save**.
7. In the **Test Completed** column, select the check box.
8. **Save**. The system removes the test from the queue.
9. If applicable, reset the filter.
10. **Exit SiteManager LIMS**.
11. Minimize the SiteManager application.

You've run AC content and a sieve analysis in the field.

Review Exercise for Asphalt Field Density

In this exercise, enter the test results for the D2950 test.

User ID **jj00001** Password **pass**
 Connection **Training Server**
 Group Name **FIELD - Operations Inspector [INSP]**
 Scenario **FIELD - Operations Inspector overseeing the
 installation of soil base material performs
 density tests with a nuclear gauge.**

IMPORTANT!

THE 11TH CHARACTER IN THE SAMPLE ID, jj00001167I143845, IS A CAPITAL LETTER 'I,' NOT THE NUMBER '1.'

TIP!

CREATE A FILTER WHERE SAMPLE ID CONTAINS 14384.

1. Log onto LIMS directly (bypassing SiteManager).
2. Open the Enter Test Results window.
3. Create a filter to display the **D2950** test on the **jj00001167I143845** sample.
4. Complete the following fields on the template with the values provided.

Equipment	14700072 – Nuclear Gauge (63247)
No. of Lots	1
Standard Count	2672
Theoretical or Laboratory Density (lb/cu ft)	158.2
Core Correction	8.9
Percent Required Density	91.0
Patching or Turnouts	0.00
Lot No.	1
From Sta	0+00
To Sta	45+00
Lin M (ft)	4500
Width	12
Lift	1
Lane	SB
Test No.	1
Sta No.	6+18
Location	L,EL
Den Count	660
Den Kg/m3 (lb/ft3)	135.2
Test No.	2
Sta No.	11+118
Location	R,WP
Den Count	655
Den Kg/m3 (lb/ft3)	138.7

Test No.	3
Sta No.	24+82
Location	Cent
Den Count	628
Den Kg/m3 (lb/ft3)	136.4
Test No.	4
Sta No.	36+00
Location	L,WP
Den Count	650
Den Kg/m3 (lb/ft3)	139.2
Test No.	5
Sta No.	45+10
Location	R,EL
Den Count	665
Den Kg/m3 (lb/ft3)	137.5
Lot Averages	132.5

5. **Save.**
6. Mark the test completed.
7. **Save.** The system removes the test from the queue.
8. Reset the filter.
9. **Exit SiteManager LIMS.**

You've recorded the asphalt field density test results.

Creating Sample Records for Concrete from Daily Work Report Items

Use the Material Inspection Detail window to view component materials, associated test methods, and more information about contract sampling and testing, including the option to create and view samples linked to a DWR item.

The screenshot shows the 'Material Inspection Detail' window with the following data:

Contract ID: TRN349 Inspector: Morgan, Bailey DWR Date: 09/24/14

Project Nbr: 67004-3213-14 Line Itm Nbr: 2440 Item Code: 604-02.01 Category Nbr: 0300
 Item Desc: CLASS A CONCRETE (BOX BRIDGES) Unit Price: \$400.00000

Supp Desc 1:
 Supp Desc 2:
 Qty Reported to Date: 0.000 Qty Authorized to Date: 0.000 Units Type: C.Y.
 Qty Installed to Date: .000 Bid Qty: 211.000 Pay To Plan Qty:
 Status: Active Qty Paid to Date: .000 Current Contract Qty: 211.000

Material Component	Cont Est Matrl Qty	Satisf Repr Matrl Qty	Reprt Matrl Qty	Matrl Unit	Conversion Factor	Contract S&T	DWR Sample
Class A Concrete	211.000	0.000	0.000	C.Y.	1.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Test Method	Sampling Rate	Sampling Frequency	Acceptance method	Sample Type	P/S C
M016-M016 - Field Tests of Freshly h	1.0	100.0	ACPT-Acceptance	ACCP-Acceptance	

Figure 29. Material Inspection Detail Window



Exercise 18

In this exercise, create a sample record from a DWR item.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	Not Applicable		
Scenario	FIELD - Operations Inspector prepares to pour a concrete bridge deck. Loads of concrete arrive at the job site. FIELD - Operations Inspector samples the first three loads and tests for air, slump and temperature.		

Use the item recorded on the DWR to create a concrete sample record for the air, slump and temperature tests and enter the test results.

1. Restore the SiteManager application. The system displays the Maintain Sample Information window and the last sample record created.
2. **Close.** The system closes the Maintain Sample Information window and displays the SiteManager Panel window.
3. Click the **Main Panel** tab. The system displays the Main Panel panel.
4. Double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports panel.
5. Double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports window.
6. On the toolbar, click the **Open** button. The system displays the Contract ID window.
7. In the **Contract ID** area, in the **Contract ID** column, double-click **TRN349**. The system displays the Inspector area.
8. In the **User ID** column, double-click **jj00001**. The system displays the DWR Date area.

Tip! To create a sample record from a DWR item, users must use their own DWR.

9. In the **DWR Date** column, double-click **09/24/14**. The system displays the DWR Info panel with information about the selected DWR.

10. Click the **Work Items** tab. The system displays the Work Items panel.

Tip! By default, the system sorts installed items to the top.

11. In the **Description** column, double-click **CLASS A CONCRETE (BOX BRIDGES)**.

Select the item's component material for the sample record.

12. On the toolbar, click the **Open Material Inspection Detail Window** button. The system displays the Material Inspection Detail window.

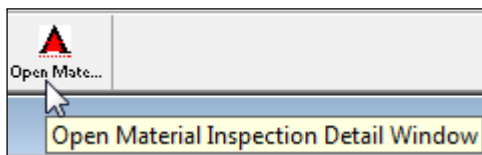


Figure 30. Daily Work Reports Window - Toolbar - Button Detail

13. In the middle pane, in the **Material Component** column, select **Class A Concrete**.

Create the sample record.

14. On the toolbar, click the **Create Sample for Selected Material** button. The system displays the Maintain Sample Information window with the material information already populated.

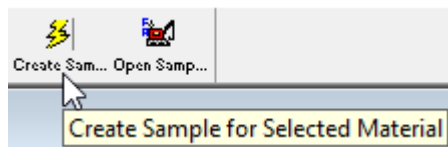


Figure 31. Material Inspection Detail Window - Toolbar - Button Detail

15. In the **Smpl Type** dropdown list, select **Acceptance**.

16. On the **Acpt Meth** dropdown list, select **Acceptance**.

17. In the **Sampler** field, type **jj00001**.

18. Using the right mouse button, click on the **P/S** field.

19. From the object menu, select **Search**.

20. In the **Producer Supplier Name** column, double-click **IMI - Livingston Ready Mix**.

21. On the **Geog Area** dropdown list, select **Region 2 - Overton**.

22. In the **Intd Use** field, type **Box Culvert End Wall and Wings**.

23. In the **Repr Qty** field, type **9.000**.

24. **Save**.

25. Write the sample ID here: _____

Complete the Addtl Sample Data panel.

26. Click the **Addtl Sample Data** tab. The system displays the Addtl Sample Data panel.

27. In the **Smpl Size** field, type **1**.

28. On the **Smpl Size Units** dropdown list, select **Cubic Yard(s)**.

29. In the **Dist from Grade** field type **0.0**.

30. In the **Dist from Grade Units** dropdown list, select **Foot/Feet**.

31. In the **Station** field, type **213+80**.

32. On the **Design Type** dropdown list, select **PCC**.

33. In the **Mix ID** field, type **714002**.

34. **Tab**.

35. Using the right mouse button, click on the **Plant ID** field.

36. From the object menu, select the **Search** choice.

37. In the **Plant ID** column, double-click **26700002**.

Note: The system does not populate the Sample Created from DWR check box, DWR Date and DWR Inspector fields until saving on the Contract panel.

38. **Save**.

Complete the Contract panel.

39. Click the **Contract** tab. The system displays the Contract panel with the CLASS A CONCRETE (BOX BRIDGES) item already selected for contract TRN349.

Note: As a FIELD - Operations Inspector, do not make any changes or enter a represented quantity.

40. **Save**.

TIP!

IF THERE IS NOT A NEW ROW WHEN YOU OPEN THIS PANEL, YOU MAY HAVE TO CLICK IN WINDOW BEFORE CLICKING NEW.

Complete the Other panel.

41. Click the **Other** tab. The system displays the Other panel.
42. Press the **space bar**. The system displays Destination Lab in the Type field.
43. Using the right mouse button, click on the **ID** field.
44. From the object menu, select the **Search** choice. The system displays the Search Window window,
45. In the **Destination Lab** column, double-click **DEST - TDOT Field Testing**. The system closes the Search Window window.
46. **Save**.

Assign tests.

47. On the toolbar, click the **Open Assign Tests** button. The system displays the Assign Sample Tests window.

Note: The message on the window warns that assigning tests to the sample will lock the sample. If uncertain about the tests needed for the sample, click the Cancel button.
48. Click **More**.
49. In the **Test to be Assigned** pane, in the Test Description column, verify that **M016 – Field Tests of Freshly Mixed Concrete** is the only test to be assigned.
50. Click **Save Tests**. The system closes the Assign Sample Tests window, makes the Assign Tests button unavailable, changes the sample status to Received, and displays the Basic Sample Data panel.

Prepare for the next part of the exercise.

Tip! The Open button and the Copy Sample feature are not available immediately after creating a sample record from a DWR. To make the features available, close the Maintain Sample Information window and re-open it.

51. **Close**. The system closes the Maintain Sample Information window and displays the Material Inspection Detail window.
52. **Close**. The system closes the Material Inspection Detail window and displays the Daily Work Reports window.

67. Click the **Apply** button.

Note: The sample ID for the record just created should appear along with the sample record and others that also contain the M016 template.

68. In the **Sample ID** column, select the sample ID of the sample record **jj00001148B081812**.

69. On the Test Data window, click the **Maximize** button to view more of the template at once.

70. Complete the following fields on the template with the values provided.

How is the Concrete Placed?	Slip Form
Contains A, F, or G Type Water Reducer?	Yes
Air Temp	65
Concrete Temp.	62
Concrete Slump	2.00
Entrained Air Content	5.6
Cylinders Cast? (Yes/No)	Yes
Cylinder Numbers	41, 41a, 41b
Number of Rejected Loads	0

71. On the Test Data window, click the **Restore Down** button.

72. Note that the test results are in-spec.

73. **Save**.

74. In the **Test Completed** column, select the check box.

75. **Save**. The system removes the test record from the Enter Test Results queue and makes it available in the Review Tests queue.

76. To clear the filter, in the **Filter Criteria** area, click the **Reset** button.

77. **Close**. The system displays the Navigation Panel window.

You've created a sample record, assigned tests, and entered test results.



Exercise 19

In this exercise, progress the test through the Review Tests queue.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	jj00001148B081812 (sample ID)		
Scenario	FIELD - Operations Inspector reviews the entered test results for any tests performed in a contractor's lab or in the field. After reviewing the test, the M016 will autofinalize if the results are in-spec.		

1. On the **Navigation Panel**, double-click the **Review Tests** icon. LIMS displays the Review Tests window.
2. In the **Filter Criteria** area, create a filter where **Test Method Equals M016**.
3. Click the **Apply** button.
4. In the **Sample ID** column, select the sample ID of the sample record **jj00001148B081812**.
5. In the lower pane in the Test Results window, review the entered data.
6. From the **Supervisor Action** dropdown list, select **Review Completed**.
7. **Save**. The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.

Tip! To view the sample and test results now, use the View-Only Sample Information window in LIMS, the Maintain Sample Information window in SiteManager, or the *Sample Details and Tests Results Report* (a custom report).

8. To clear the filter, in the **Filter Criteria** area, click the **Reset** button.
9. **Exit SiteManager LIMS**. The system displays the Maintain Sample Information window.

View the test results from the Maintain Sample Information window.

10. Click the **Tests** tab. The system displays the Tests panel with the M016 test selected.
11. From the **Services** menu, select **Enter/View Test Data**. The system displays the Material Test Template Usage window.
12. Scroll to view the test results entered for the M016 test.
13. **Close**. The system displays the Tests panel.

You've progressed the in-spec test through the Review Tests queue and authorized the sample.

Copying a Sample Record for Concrete



Exercise 20

In this exercise, create a sample record of a concrete sample for the compressive strength test by copying the sample record for the air, slump and temperature tests.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	jj00001148B081812 (sample ID)		
Scenario	FIELD - Operations Inspector pours cylinders, numbers them, sets them aside for 24-48 hours on the job site, strips them, marks them, and puts them in a curing box on the job site. FIELD - Operations Inspector creates a sample record and assigns the necessary test for the lab technician in the TDOT Concrete Cylinder/Core Lab to complete. Construction sends cylinders to Regional Office and then REG - M&T sends to HQ Nashville.		

1. Click the **Basic Sample Data** tab. The system displays the Basic Sample Data panel.
2. On the Maintain Sample Information window's **Services** menu, select the **Copy Sample** choice. The system displays the Copy Sample window.
3. Click the **Copy lab control number from existing sample** button.
4. Click **OK**. The system creates a new sample record linked to the air, slump and temperature sample record by lab control number CNjj00001148B081812.
5. **Save**.

Complete the Addtl Sample Data panel.

6. Click the **Addtl Sample Data** tab. The system displays the Addtl Sample Data panel.
7. In the **Cntrl Number** field, type the cylinder numbers as **41, 41a, 41b**.
8. **Save**.

Complete the Contract panel.

9. Click the **Contract** tab. The system displays the Contract panel.

Complete the Other panel.

10. Click the **Other** tab. The system displays the Other panel.

Warning! This destination lab is not correct for this type of sample.

11. Using the right mouse button, click on the **ID** field.
12. From the object menu, select the **Search** choice. The system displays the Search Window window
13. In the **Destination Lab** column, double-click **DEST – Headquarters/Receiving Dock**. The system closes the Search Window window.

Warning! Do not assign the regional lab as the destination lab! Although cylinders go to the regional lab for transfer, assign the final destination where the testing will be performed.

14. **Save**.

Assign tests.

15. On the toolbar, click the **Open Assign Tests** button. The system displays the Assign Sample Tests window.

Note: The message on the window warns that assigning tests to the sample will lock the sample. If uncertain about the tests needed for the sample, click the Cancel button.

16. Click **More**. The system displays the Assign Sample Tests window.
17. Take note of the tests to be assigned and the additional available tests.
18. Click **Save Tests**. The system assigns the T22 - Compressive Strength of Cylindrical Concrete Specimens test to the TDOT Concrete Cylinder/Core Lab, closes the Assign Sample Tests window, displays the Basic Sample Data panel, makes the Open Assign Tests button unavailable and changes the sample status to Logged.

19. **Exit SiteManager.**

You've copied a sample record and assigned tests.

Review Exercise for Copying Concrete Field Tests

In this exercise, copy the sample record for testing concrete in the field to create the sample record for testing cylinder strength.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD – Operations Inspector [INSP]		
Scenario	Field – Operations Inspector has created a sample record for concrete field tests and now will copy the said sample record to associate cylinder test to be performed by HQ Material & Tests.		

1. Copy sample **jj0000115AS104849** and copy the lab control number from the existing sample.
2. Change the destination lab to **DEST – TDOT Headquarters/Receiving Dock.**
3. Assign test **T22.**
4. **Exit SiteManager.**

You've copied a sample, made the necessary changes and assigned tests.

Summary

To access the Maintain Sample Information window:

1. On the **Main Panel**, double-click the **Materials Management** icon.
2. On the **Materials Management** panel, double-click the **Sampling and Testing** icon.
3. On the **Sampling and Testing** panel, double-click the **Sample Information** icon. SiteManager displays the Maintain Sample Information window.

To assign tests to a sample record:

1. On the Maintain Sample Information window's toolbar, click the **Open Assign Tests** button. The system displays the Assign Sample Tests window.

Note: The message on the window warns that assigning tests to the sample will lock the sample. If uncertain about the tests needed for the sample, click the Cancel button.

TDOT recommends always clicking More instead of Accepting Default Tests.

2. Click **More**.
3. Click **Save Tests**. The system closes the Assign Sample Tests window, makes the Open Assign Tests button unavailable, changes the sample status to Received, and displays the Basic Sample Data panel.

To open LIMS:

1. Double-click the **SiteManager LIMS** desktop icon.
- or -
On the Maintain Sample Information window's toolbar, click the **Open LIMS** button.

Refer to the following procedure documents for general step-by-step instruction:

- *P055 - Find Samples*
- *P058 - Maintain Sample Information*
- *P061 - Receive Sample at Destination Lab*
- *P062 - Receive Sample in Lab Unit*
- *P054 - Enter Test Results*
- *P064 - Review Tests*
- *P063 - Review Samples*
- *P071 - View-Only Sample Information*

Creating and Viewing Diaries for Field and Office Documentation

In this chapter, you will receive instruction about the following:

- Understanding Diaries 2
- Creating a New Diary 4
- Viewing the DWR Template Report 6
- Authorizing Daily Work Reports 7
- Creating Charge Days and No Charge Days 9
- Viewing the Unauthorized DWR Report 11
- Unauthorizing and Correcting a DWR Work Item Error 12
- Viewing the History of Daily Work Reports 16
- Summary 22
- Review Exercise 25

Understanding Diaries

Each diary is a daily collection of the authorized Daily Work Reports (DWRs) submitted by all personnel working on the contract. Users can create only one diary per day per contract. Users can also create diaries for days when no DWRs are collected.

The Diary window has two panels:

- Authorize (approving for payment)
- Charge

Use the Diary window to perform five functions:

- Create a new or open an existing Diary for a specific contract and day
- Preview Daily Work Reports for a specific contract and day
- Authorize Daily Work Reports (or not)
- Apply Time Charges for a specific contract and day (This applies to milestone or working day contracts. Working day contracts are rarely used.)
- Make Remarks

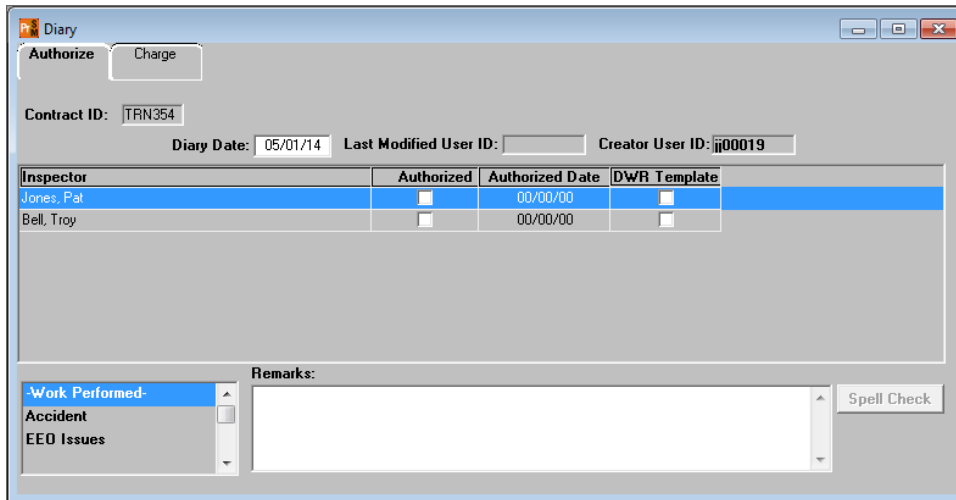


Figure 1. Diary Window - Authorize Panel

THE LEAD INSPECTOR OR DISTRICT SUPERVISOR WILL CREATE A DIARY FOR EACH DAY DURING THE LIFE OF A CONTRACT, INCLUDING WEEKENDS AND HOLIDAYS, AND WILL REVIEW AND AUTHORIZE ALL APPLICABLE DWRs ASSOCIATED WITH THE DIARY.

CREATE DIARIES IN SERVER MODE ONLY. DO NOT PIPELINE DIARIES.



Exercise 1

In this exercise, open the Diary window.

User ID **jj00019** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**

1. Start and log onto SiteManager as user **jj00019** *while connected in server mode.*
2. On the **Main Panel**, double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports panel.
3. Double-click the **Diary** icon.

SHIFT-TAB IF
USER ID NOT
HIGHLIGHTED.

You've opened the Diary window.

Creating a New Diary

Use the Diary window's Authorize panel to create a diary. The user can create a diary with or without DWRs. Typically, the user creates a diary from the DWRs that have been submitted by the inspectors. To create a diary, the user selects a contract first, and then enters the diary date on the Authorize panel. By entering the date, the user is also selecting the DWRs with this date and creating a diary with this date. The user can enter a date by selecting it from a calendar. If the user double-clicks the Diary Date field, the system displays a calendar from which the user can select a date.

IF DIARY ALREADY EXISTS FOR ENTERED DATE, IT WILL AUTOMATICALLY OPEN.

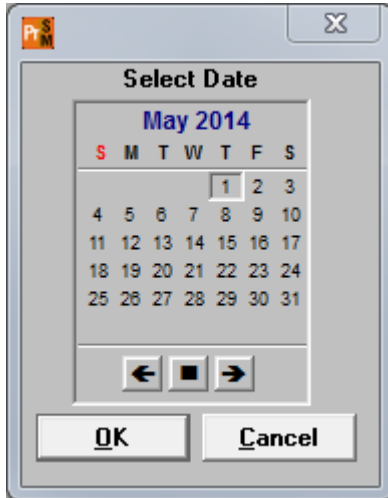


Figure 2. Calendar

Tip! The user cannot enter a date that is after the current date.

After the user selects a date, the Authorize panel lists the Daily Work Reports submitted for the selected date.



Exercise 2

In this exercise, create a new diary.

User ID **jj00019** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**
Prior Keys **TRN354**

1. On the **Diary** window, click the **Services** menu and click **Choose Keys**. The system displays the Contract ID window.
2. In the **Contract ID** column, scroll to and double-click **TRN354**.
3. In the **Diary Date** field, type **050114**.
4. Press the **Enter** key. The system displays the list of DWRs submitted for the current date.
5. **Save**.

HAVE
STUDENTS
TYPE THE
DATE.

You've created a diary.

Viewing the DWR Template Report

TDOT developed the BOE report, *DWR Template*, that shows all the DWR templates used for a contract. With this report, users can print a list of all DWR templates for the items and time period chosen and view the DWR template entries for multiple items and time periods at the same time.

— ACCESSED FROM SM-OPERATIONS FOLDER.

Figure 3. DWR Template Report – Parameters

Print Date: 10/20/2014
J02254

STATE OF TENNESSEE
DEPARTMENT OF TRANSPORTATION
DWR Template Report

Report Beginning Date: 07/14/2014 Report Ending Date: 10/20/2014

Item Code	Description	Unit	Quantity	Rate	Total	Sub-Contract	Contract	Contract										
071312014	1	Calstrip Quantity	+0.00	0.00	+0.00	27.360	Work Order Approved sub-contract. See Attachment for dates and quantity.	Y	0001	Citland, Andrew								
SM01	Header	File	Reason for Not Using Other Attachment	27.360	File Attachment													
Contract CHN156 Project Number: 74019-2259-04 Category Number: 0100																		
Line Item:	9130	Item Code:	716-1326	Unit Type:	LM	Item Desc:	SPRAY THERMO PAVT MARKING (40 HSI) (4IN LINE)	Unit Qty:	23.000	Current Contract Qty:	23.000							
								City Reported To Date:	21.891	Line Item Aq. To Date:	0.000							
								City Authorized To Date:	21.891	City UnAuthorized To Date:	0.000							
								City Paid To Date:	21.891	City Unpaid To Date:	0.000							
DWR DATE	Loc Item #	Location	From Site	To Site	Placed Qty	Rate/ft	Auth	Est #	Station									
071312014	1	00696	+0.00	0.00	10.022		Y	0001	Citland, Andrew									
SM17	Header	File	Reason for Not Using Other Attachment	10.022	File Attachment													
Result:	Location_1	Location_2	Location_3	Location_4	Location_5	Location_6	Location_7	Location_8	Location_9	Location_10	Location_11	Location_12	Location_13	Location_14	Location_15	Location_16	Location_17	Location_18
Pay Quantity:	Location_1	Location_2	Location_3	Location_4	Location_5	Location_6	Location_7	Location_8	Location_9	Location_10	Location_11	Location_12	Location_13	Location_14	Location_15	Location_16	Location_17	Location_18
10.022	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
4	10.022	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
08210214	1	00696	+0.00	0.00	+0.00	11.869	Y	0001	Citland, Andrew									
SM17	Header	File	Reason for Not Using Other Attachment	11.869	File Attachment													
Result:	Location_1	Location_2	Location_3	Location_4	Location_5	Location_6	Location_7	Location_8	Location_9	Location_10	Location_11	Location_12	Location_13	Location_14	Location_15	Location_16	Location_17	Location_18
Pay Quantity:	Location_1	Location_2	Location_3	Location_4	Location_5	Location_6	Location_7	Location_8	Location_9	Location_10	Location_11	Location_12	Location_13	Location_14	Location_15	Location_16	Location_17	Location_18
11.869	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
6	11.869	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000

UNDER THE REPORT LINE AFTER THE DWR INFORMATION, THE DWR TEMPLATE DATA IS LISTED.

Figure 4. DWR Template Report (page with template information)

Print Date: 10/20/2016 J02314		STATE OF TENNESSEE DEPARTMENT OF TRANSPORTATION DWR Template Report		
Report Beginning Date: 07/14/2014		Report Ending Date: 10/20/2016		
Zero Qty Installed Items				
Project: 74019-3209-04				
Line Item	Item Code	Item Units	Item Desc	Bid Qty
0013	105-07	DAY	LIQUIDATED DAMAGES	0.00
0009	109-01.01	DOLL	PAY ADJUSTMENT FOR FUEL	0.00
0011	109-01.02	DOLL	PAYMENT ADJUSTMENT FOR BITUMINOUS MATERIAL	0.00
Project: 74019-4209-04				
Line Item	Item Code	Item Units	Item Desc	Bid Qty
0014	105-07	DAY	LIQUIDATED DAMAGES	0.00
0010	109-01.01	DOLL	PAY ADJUSTMENT FOR FUEL	0.00
0012	109-01.02	DOLL	PAYMENT ADJUSTMENT FOR BITUMINOUS MATERIAL	0.00
0005	307-03.00	DOLL	PRICE ADJUSTMENT FOR AC CONTENT	0.00
0007	307-05.40	DOLL	LIQUID ANTI-STRIP AGENT PAYMENT	0.00
0008	307-05.41	DOLL	HYDRATE LIME ANTI-STRIP AGENT PAYMENT	0.00
0004	407-07	DOLL	DENSITY DEDUCTION	0.00
0005	407-09	DOLL	ASPHALT CEMENT CONTENT & GRADATION DEDUCTION	0.00
0040	411-01.10	TON	ACS MIX(P064-22) GRADING D	1,162.00
0000	411-03.00	DOLL	PRICE ADJUSTMENT FOR ASPHALT CEMENT CONTENT	0.00
0001	411-03.40	DOLL	MATERIAL VARIATION DEDUCTION	0.00
0002	411-05.40	DOLL	LIQUID ANTI-STRIP AGENT PAYMENT	0.00
0003	411-05.41	DOLL	HYDRATED LIME ANTI-STRIP AGENT PAYMENT	0.00
0080	415-01.01	TON	COLD PLANING BITUMINOUS PAVEMENT	4,174.00
0080	712-04.01	EACH	FLEXIBLE DRUMS (CHANNELIZING)	25.00
0090	712-05.01	EACH	WARNING LIGHTS (TYPE A)	4.00
0150	730-14.02	L.F.	SAW SLOT	550.00
0160	730-14.03	L.F.	LOOP WIRE	1,200.00

END OF REPORT

12

Figure 5. DWR Template Report (last page)

REVIEW THE LAST PAGE OF THIS REPORT TO DETERMINE THE ITEMS ON THE CONTRACT THAT HAVE NO INSTALLED QUANTITIES.

Authorizing Daily Work Reports

Use the Authorize panel to authorize or unauthorize Daily Work Reports. A Daily Work Report with a check in the Authorized check box is considered authorized. When a Daily Work Report is marked as authorized, the system enters the current date in the Authorized Date field. Remove authorization (and the authorized date) by clearing the check from the Authorized check box, unless an estimate has been generated or approved.

By authorizing a Daily Work Report, the user is flagging that DWR for use by the Contractor Payments component of SiteManager in the Estimate Generation process. Authorization approves the installed work reported by the DWR to be included in the next estimate for payment.

Once a Daily Work Report has been uploaded to the server, authorized, and has been used in an approved estimate to pay a contractor for the installed work reported by it, it cannot be unauthorized or changed in any way.

BEFORE AUTHORIZING, THE LEAD INSPECTOR OR DISTRICT SUPERVISOR SHOULD REVIEW THE DWR FOR ERRORS OR OMISSIONS AND ANY NECESSARY REMARKS SHOULD BE ENTERED IN THE REMARK TYPE FIELD.

IT IS IMPORTANT THAT THE DISTRICT SUPERVISOR OR INSPECTOR REVIEW ALL DWRS AND AUTHORIZE EACH DWR ONLY IF ALL THE REPORTED PLACED QUANTITIES ARE ACCURATE.



Exercise 3

In this exercise, authorize the DWR.

User ID **jj00019** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**
Prior Keys **TRN354**

1. In the **Inspector** column, select **Bell, Troy**.
2. In the **Authorized** column, select the check box.
3. In the **Inspector** column, select **Jones, Pat**.
4. In the **Authorized** column, select the check box.
5. **Save**.

You've authorized a DWR.

Creating Charge Days and No Charge Days

For milestones, use the Charge panel to record charge or credit information for the day and enter remarks. Review the Daily Work Reports in the diary to determine if work was performed on the contract. If work was performed, a Full Day charge can be applied. A No Charge (credit) day is a day on which no work was performed on the contract. For No Charge days, the user must enter a credit reason to explain why a credit was given. The user can also apply charge or credit information to milestones for the Contract. For No Charge days applied to a milestone, the user must also enter a credit reason.

Mistr Nbr	Milestone Description	Charge Amount	Credit Reason
01	Mowing Cycle 1	Full Day	
02	Mowing Cycle 2	No Charge	Weather

Figure 6. Diary Window - Charge Panel

THE MAJORITY OF CONTRACTS WILL HAVE A FIXED COMPLETION DATE AND THEREFORE IT WILL NOT BE NECESSARY TO INDICATE A CHARGE DAY ON THE CHARGE PANEL. CONSEQUENTLY, THE CHARGE PANEL HAS NO IMPACT ON FIXED COMPLETION DATE CONTRACTS.

CHARGING OF DAYS IS TYPICALLY ONLY DONE ON MOWING AND LITTER REMOVAL CONTRACTS.

TDOT WILL NOT USE HALF-DAY CHARGES.



Exercise 4

In this exercise, review the Charge panel.

User ID **jj00019** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**
Prior Keys **TRN354**

THE CHARGE PANEL
HAS NO IMPACT ON
FIXED COMPLETION
DATE CONTRACTS.

1. On the Diary window, click the **Charge** tab. The system displays the Charge panel.
2. To apply the charge to a milestone, click in the lower pane.

Add a milestone.

3. On the toolbar, click **New**. The systems inserts an empty row.
4. In the **Milestone** dropdown list, select **01, Mowing Cycle 1**.
5. In the **Charge Amount** dropdown list, confirm that the default **Full Day** is selected.
6. **Save**.

Add another milestone.

7. On the toolbar, click **New**. The systems inserts an empty row.
8. In the **Milestone** dropdown list, select **02, Mowing Cycle 2**.
9. In the **Charge Amount** dropdown list, select **No Charge**.
10. In the **Credit Reason** dropdown list, select **Weather**.
11. **Save**.

You've applied a no charge day to a milestone.

Viewing the Unauthorized DWR Report

The BOE report, *Unauthorized DWR*, shows all the DWRs for a project that remain Unauthorized.

WE CANNOT VIEW TDOT CUSTOM REPORTS IN THE TRAINING ENVIRONMENT.

BusinessObjects 3.1

Welcome: JJCT102

Home | Document List | Open | Send To | Dashboards | Help | Preferences | About | Log Out

View - Unauthorized DWR

Enter prompt values.

Select Contract: Contract: ...

Enter End Date: End Date: Please enter Date in format "mm/dd/yyyy". 12/31/2100

OK

Discussions

Figure 7. Unauthorized DWR Report - Parameters

Print Date: 07/29/2016
JJCT102

TENNESSEE DEPARTMENT OF TRANSPORTATION
SITEMANAGER
Unauthorized DWR Report

Contract: CNN244
Report Ending Date: 12/31/2100

<u>DWR Date</u>	<u>Inspector</u>	<u>Remarks</u>
02/06/2015	Harmen, Fred	
02/06/2015	Rush, Tom	
02/06/2015	Whittle, Linda	

Figure 8. Unauthorized DWR Report

THE BOE REPORT, *UNAUTHORIZED DWR*, IS USED TO PRINT A LIST OF ALL DWR REPORTS ON THE SERVER THAT ARE UNAUTHORIZED FOR THE TIME PERIOD. THIS WILL ALLOW UNAUTHORIZED DWRS TO BE AUTHORIZED AND INCLUDED IN THE ESTIMATE.

Unauthorizing and Correcting a DWR Work Item Error

A Daily Work Report may be unauthorized on the Diary window if the DWR has not been included in a generated estimate. A user with the appropriate security rights may access the Diary window, and deselect the Authorize indicator (OFF). Once unauthorized, the Daily Work Report will no longer be locked for modification and the author of the DWR can update the record with the necessary changes. Once the record has been modified, a user with the appropriate security rights can access the Diary window, preview the DWR to verify the changes, and select the Authorize indicator (ON). The authorized DWR will be included in the next estimate generated.

Note: A DWR that has been included on a generated estimate that has not been approved at the final approval level can still be modified if necessary. The estimate may be deleted from the application and the outlined process for correcting a DWR may be executed.

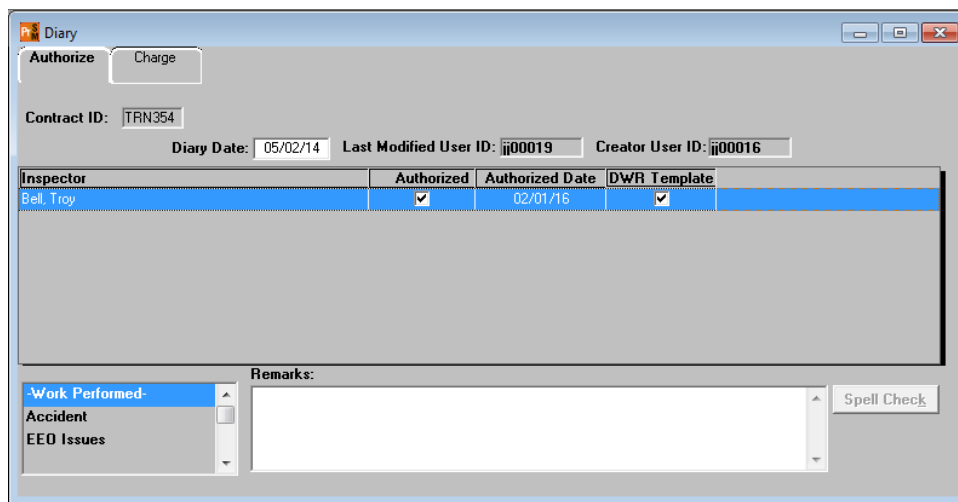


Figure 9. Diary Window with Authorized DWRs

IF AN INACCURACY IS DISCOVERED FOR A DWR THAT HAS BEEN AUTHORIZED ON A DIARY BUT NOT INCLUDED ON AN ESTIMATE, THE DWR SHOULD BE UNAUTHORIZED AND THE CREATOR OF THE DWR NOTIFIED OF THE NECESSARY CHANGES. IF THE DWR AUTHOR IS AN INSPECTOR, THE DWR SHOULD BE PIPELINED TO STANDALONE MODE, MODIFIED AS APPROPRIATE, AND PIPELINED BACK TO THE SERVER. THE PROJECT SUPERVISOR OR LEAD INSPECTOR WILL THEN RE-AUTHORIZE THE UPDATED DWR IN THE DIARY WINDOW.

OFFICE STAFF WILL CREATE AND CORRECT THEIR DWRS IN SERVER MODE.

EVERY ATTEMPT SHOULD BE MADE TO UNCOVER INACCURACIES PRIOR TO GENERATING AN ESTIMATE.

NOTE: DIARIES ARE MANAGED IN SERVER MODE ONLY.



Exercise 5

In this exercise, unauthorize a DWR on the diary; adjust the placed quantity on the DWR and then re-authorize the DWR for payment.

User ID	jj00019	Password	pass
Connection	Training Server		
Group Name	FIELD - District Operations Supervisor [PJSUPS]		
Prior Keys	TRN354		

1. Click the **Authorize** tab. The system displays the Authorize panel.
2. On the toolbar, click the **Open** button. The system displays the Contract ID window.

Choose a different diary on the same contract.

3. In the **Diary Date** column, double-click **05/02/2014**. The system displays the selected record in the Diary window.
4. In the **Inspector** column, select **Bell, Troy**.

Unauthorize a DWR.

5. Clear the **Authorized** check box.
6. **Save**.
7. **Close**.
8. **Exit SiteManager**.

Now that the 05/02/14 DWR has been unauthorized, the Inspector will need to pipeline the DWR Server to PM for corrections.

Log on as an Inspector in server mode to pipeline the DWR to standalone.

9. Start and log onto SiteManager as user **jj00004** *while connected in server mode*.
10. Pipeline **Bell, Troy** DWR for **05/02/14** on **TRN354** to **standalone** from server.
11. **Exit SiteManager**.

Log on as an Inspector in standalone mode to correct the DWR.

12. Start and log onto SiteManager as user **jj00004** *while connected in standalone mode*.
13. On the **Main Panel**, double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports panel.
14. Double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports window.
15. Click the **Open** button. SiteManager displays the Contract ID window.
16. In **Contract ID** column, double-click **TRN354**.
17. In the **Inspector** area, in the Inspector Name column, double-click **Bell, Troy**.
18. In the **Date** area, in the DWR Date column, double-click **05/02/14**. SiteManager displays that DWR in the Daily Work Reports window.

Select the work item to correct.

19. Click the **Work Items** tab.
20. In the **Item Code** column, scroll to and select **204-07** for Project **67004-3213-14**, Line Item Number **9500**, Category Number **0100** and Description **BEDDING MATERIAL (PIPE) CLASS B**.
21. On the toolbar, click the **Record Work Item** button. The system displays the Work Items panel.

Choose a template to use for the correction.

22. On the toolbar, click the **DWR Template** button. SiteManager displays the DWR Template window.
23. In the **Template ID** column, double-click **SM10E**. The system displays the DWR Template – SM10E window.
24. In the **Length (ft)** field, type **50.00** (over the previously entered value of 5.00).
25. Press the **Tab** key to calculate.
26. **Save**.
27. **Close**. The system closes the DWR Template window.
28. **Exit SiteManager**.

Log on as an Inspector in server mode to pipeline the DWR to server.

29. Start and log onto SiteManager as user **jj00004** *while connected in server mode.*
30. Pipeline **Bell, Troy** DWR for **05/02/14** on **TRN354** to server from standalone mode.
31. **Exit SiteManager.**

Log on again as the Project Supervisor or the Lead Inspector.

32. Start and log onto SiteManager as user **jj00019** *while connected in server mode.*
33. On the **Main Panel**, double-click the **Daily Work Reports** icon.
34. On the **Daily Work Reports** panel, double-click the **Diary** icon. The system displays the Diary window.
35. On the toolbar, click the **Open** button. SiteManager displays the Contract ID window.
36. In the **Contract ID** column, double-click **TRN354**.
37. In the **Diary Date** column, double-click **05/02/14**.

Now, authorize the DWR in the diary.

38. In the **Inspector** list box, click the DWR for **Bell, Troy**.
39. Select the **Authorized** check box.
40. **Save.**
41. **Close.** The system closes the Diary window and displays the Daily Work Reports panel.

You've unauthorized a DWR on the diary; adjusted the placed quantity on the DWR and then re-authorized the DWR for payment.

Viewing the History of Daily Work Reports

The History window displays DWR records for the selected contract. To run history reports, select a contract when the History window first opens and displays a selection list of contracts. View the reports online or print the reports.

The History window has the following panels:

- DWR History
- Work Item History
- Contractor History

REPORTS ARE SORTED BY DWR "DATES" ONLY.

DWR History

The DWR History panel displays a history of all of the DWRs available to the current user. This report groups all the DWRs by date and inspector, in ascending order. Other information includes weather conditions, temperatures, and work suspended times. View the report online or print it.

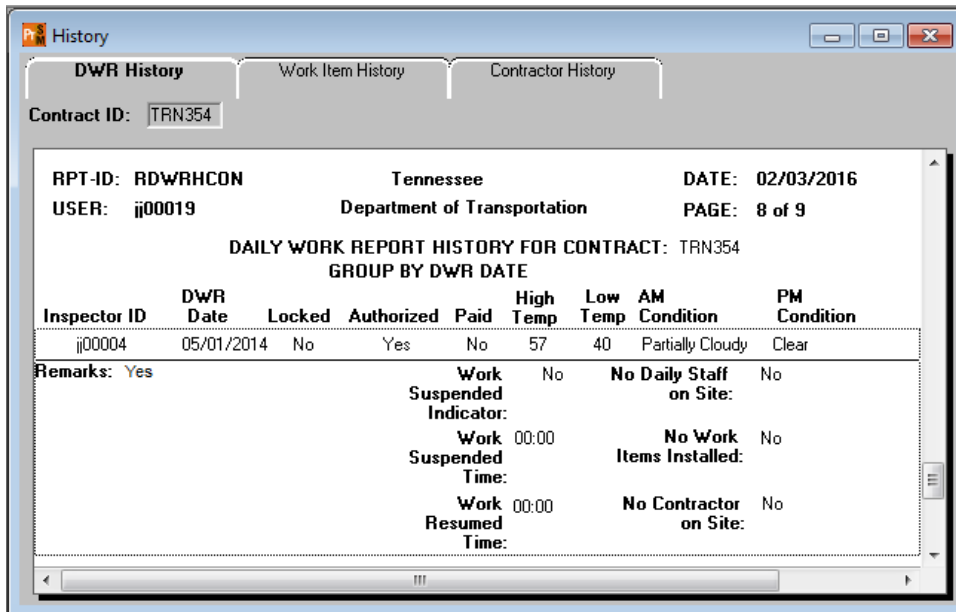


Figure 10. History Window - DWR History Panel



Exercise 6

In this exercise, view the history of DWRs for a contract.

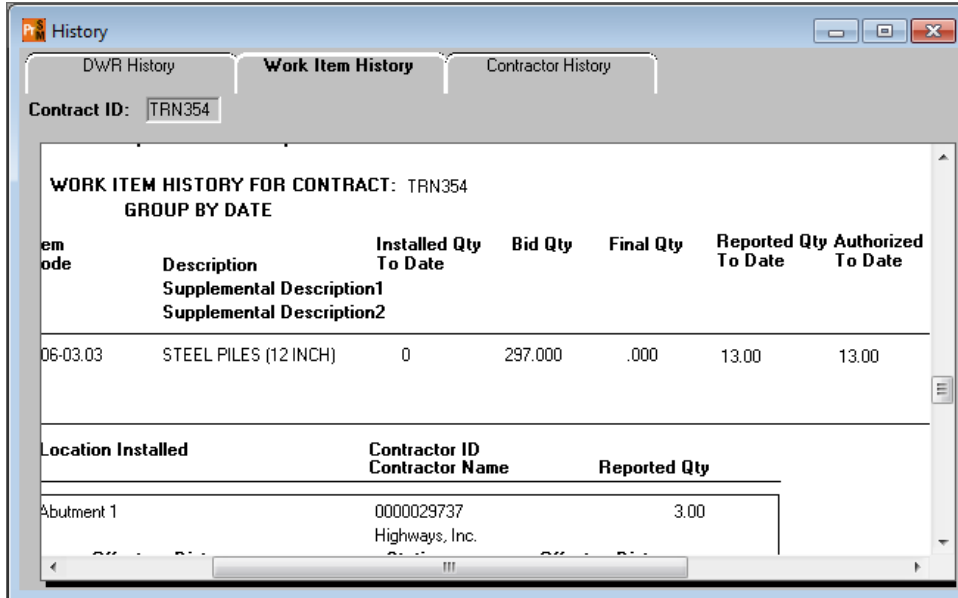
User ID **jj00019** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**
Prior Keys **TRN354**

1. On the **Daily Work Reports** panel, double-click the **History** icon.
2. On the toolbar, click the **Next** button. View the DWRs for **TRN354**.
3. What were the high temperature and morning weather conditions as recorded by **jj00004** on **05/01/14**?

You've viewed the history of DWRs for a contract.

Work Item History

The Work Item History panel displays a history of all work items recorded in the DWRs for the selected contract. View the report online or print it.



History

DWR History **Work Item History** Contractor History

Contract ID: TRN354

WORK ITEM HISTORY FOR CONTRACT: TRN354
GROUP BY DATE

Item Code	Description	Installed Qty To Date	Bid Qty	Final Qty	Reported Qty To Date	Authorized Qty To Date
06-03.03	STEEL PILES (12 INCH)	0	297.000	.000	13.00	13.00

Location Installed	Contractor ID	Contractor Name	Reported Qty
Abutment 1	0000029737	Highways, Inc.	3.00

Figure 11. History Window - Work Item History Panel



Exercise 7

In this exercise, view the history of work items.

User ID **jj00019** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**
Prior Keys **TRN354**

1. On the **History** window, click the **Work Item History** tab.
2. Use the vertical and horizontal scrollbars to view the work items for **TRN354**.
3. What quantity reported to date did **jj00018** record for Line Item Number **2670** on **05/01/14**? _____

You've viewed the history of work items.

Contractor History

The Contractor History panel displays three separate reports:

- Equipment History
- Supervisor History
- Variable Labor History

Each type of report can be selected using the appropriate toolbar button or by choices under the Services menu.



Figure 12. History Window - Contractor History Panel - Equipment History (clicked by default), Supervisor History, and Variable Labor History Buttons

Equipment History Report

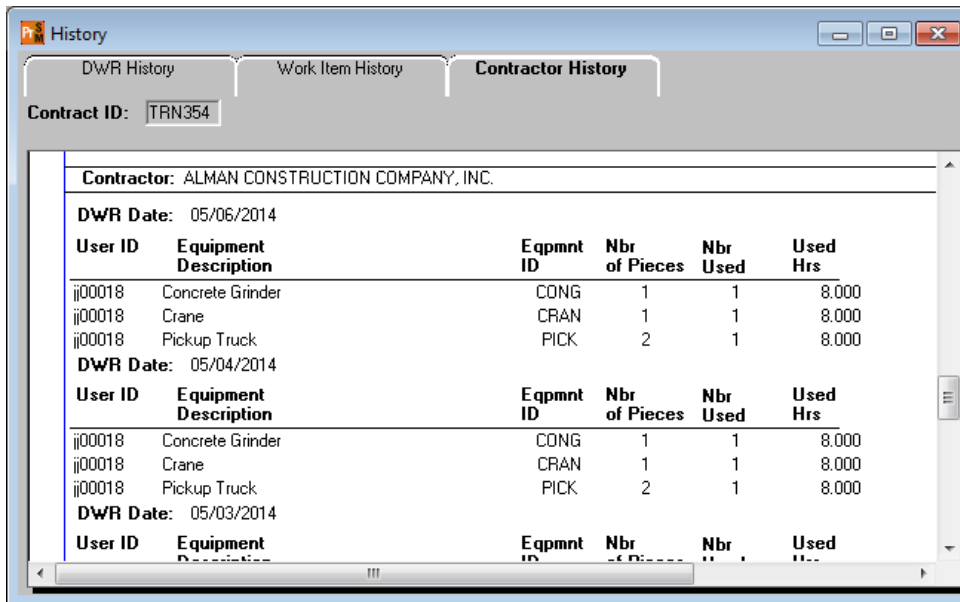
The screenshot shows a software window titled "History" with three tabs: "DWR History", "Work Item History", and "Contractor History". The "Contractor History" tab is active, showing a "Contract ID" of "TRN354". Below this, there are three sections of data, each starting with a "DWR Date". The first section is for "05/06/2014" and the contractor is "ALMAN CONSTRUCTION COMPANY, INC.". It lists three items: a Concrete Grinder (User ID: jj00018, Eqmnt ID: CONG, 1 piece, 1 used, 8.000 hrs), a Crane (User ID: jj00018, Eqmnt ID: CRAN, 1 piece, 1 used, 8.000 hrs), and a Pickup Truck (User ID: jj00018, Eqmnt ID: PICK, 2 pieces, 1 used, 8.000 hrs). The second section is for "05/04/2014" and the third for "05/03/2014", both showing the same three items with identical data.

Figure 13. History Window – Contractor History Panel - Equipment History Report

Supervisor History Report

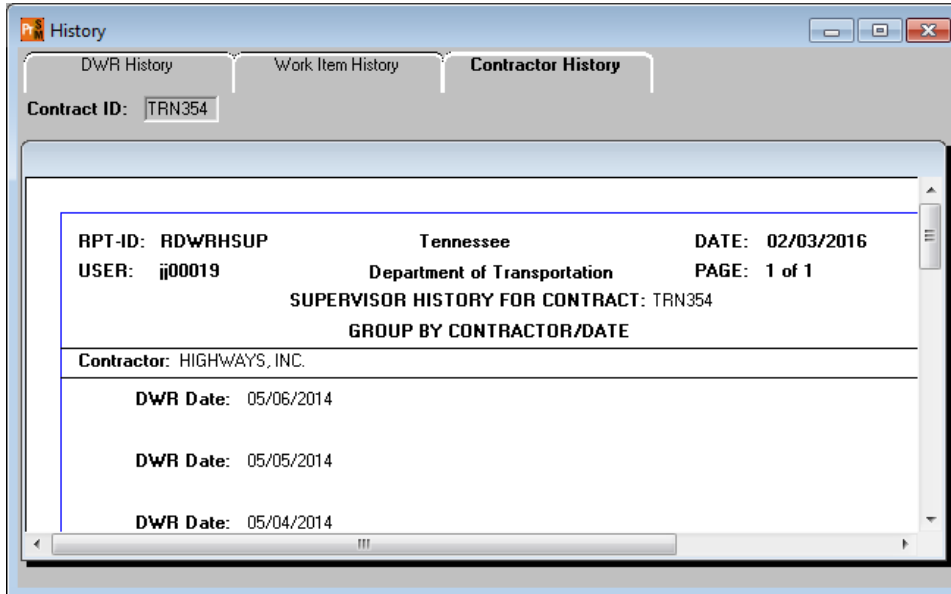


Figure 14. History Window – Contractor History Panel - Supervisor History Report

Variable Labor History Report

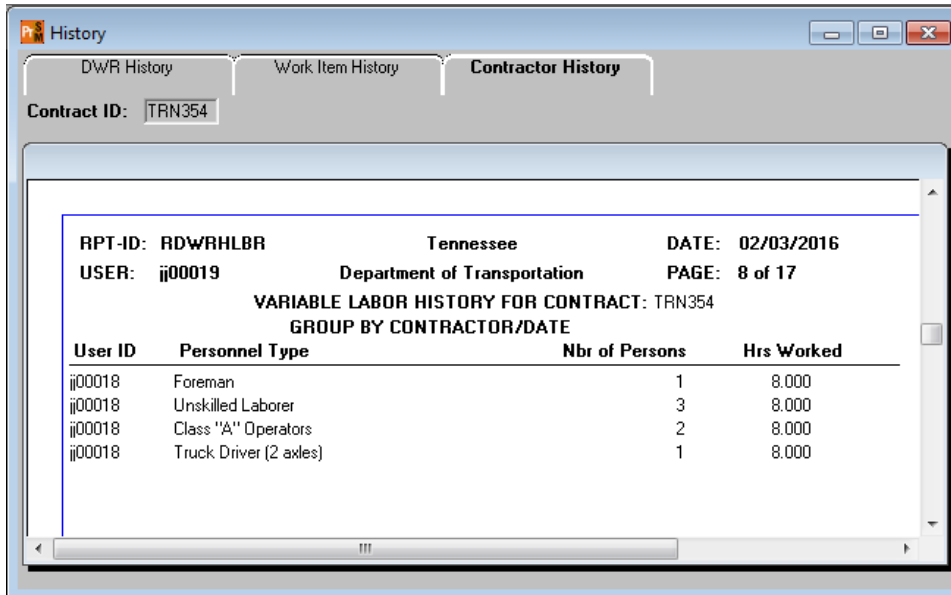


Figure 15. History Window – Contractor History Panel – Variable Labor History Report



Exercise 8

In this exercise, select and view the contractor history reports.

User ID **jj00019** Password **pass**
Connection **Training Server**
Group Name **FIELD - District Operations Supervisor [PJSUPS]**
Prior Keys **TRN354**

1. On the **History** window, click the **Contractor History** tab. The system displays the Contract History panel.
2. The **Equipment History** report displays automatically.
3. What piece(s) of equipment and the number used did **jj00018** record for **Alman Construction Company, Inc.** on the DWR for **05/04/14**?

4. Click the **Variable Labor History** button.
5. What **Personnel Types** did **jj00018** record on site for **Highways, Inc.** on the DWR for **05/04/14**? _____

6. **Close.**

You've viewed the Contractor History Reports.

Summary

To create a new diary:

1. On the **Daily Work Reports** panel, double-click the **Diary** icon.
2. Click the **Services** menu and click the **Choose Keys** choice.
3. In the **Contract** list box, scroll to and click the desired contract.
4. Click **OK**. The Authorize panel lists the DWRs submitted for the current date.
5. To change the date, double-click the **Diary Date** field. This opens a calendar on which a date prior to the current date can be selected. To select a prior month, click the left arrow. To enter the selected date, click **OK**.
6. To enter a remark, in the **Remark Type** list box, scroll to and click the remark type. Then, type the remark in the **Remarks** field.
7. **Save**.
8. Click **OK**.

To authorize a Daily Work Report:

1. On the **Daily Work Reports** panel, double-click the **Diary** icon.
2. Create a new diary or open an existing diary.
3. In the **Inspector** list box, scroll to the DWR to be authorized.
4. Select the **Authorized** check box (ON).
5. Click the **Save** button.

To unauthorize a Daily Work Report:

1. On the **Daily Work Reports** panel, double-click the **Diary** icon.
2. Open an existing diary.
3. In the **Inspector** list box, scroll to the DWR to be authorized.
4. Clear the **Authorized** check box (OFF).
5. **Save**.

To create charge or no charge day:

1. On the **Daily Work Reports** panel, double-click the **Diary** icon.
2. Create a new diary or open an existing diary.
3. Click the **Charge** tab.
4. In the **Charge Type** field, click the radio button of the charge type to apply to the day for the contract.
5. If the charge type is **No Charge**, in the **Credit Reason** dropdown list, select the reason for not charging all or part of the day.
6. To apply all or part of the charge or credit to a milestone, click the **Milestone** field and click the **New** button. The system inserts an empty row.
7. In the **Milestone** dropdown list, click the expand arrow and click the milestone to apply the charge or credit.
8. In the **Charge Amount** dropdown list, select **Full Day** or **No Charge**.
9. If **No Charge** is entered as the Charge Amount for the milestone, in the **Credit Reason** dropdown list, select the reason for a credit.
10. **Save**.

To access TDOT custom reports:

1. Launch Internet Explorer.
2. Access web address
<http://boe.tdot.tn.gov/InfoViewApp/logon.jsp>
3. Click the **plus sign** next to **Public Folders**.
4. Click the **plus sign** next to **SiteManager**.
5. Click the desired group name.
6. Click the desired report name.
7. Enter the desired prompt values.
8. Click the **OK** button.
9. **Print** or **Save** the report as appropriate.

To view the History of Daily Work Reports:

1. On the **Daily Work Reports** panel, double-click the **History** icon. The system opens the Select Contract window.
2. In the **Contract** list box, scroll to and click the desired contract.
3. Click **OK**. The system display **DWR History** panel.
4. Click the **Down Arrow** button to view the DWRs.

Review Exercise

In this exercise, create a diary and review activities.

User ID	jj00019	Password	pass
Connection	Training Server		
Group Name	FIELD - District Operations Supervisor [PJSUPS]		
Prior Keys	TRN354		

Create a diary and authorize the correct DWRs on one diary and unauthorize a DWR with an error on another diary.

1. Create a new diary for contract **TRN354** on **05/06/14**.
2. Authorize the **Jones, Pat** DWR for **05/06/14**.
3. Open the diary **05/05/14** for contract **TRN354**.
4. Unauthorize the **Bird, Chris** DWR.
5. **Exit SiteManager**.

Pipeline a DWR with a reporting error on it from server to standalone.

6. Log on in **Server** mode as **jj00017**.
7. Pipeline **Bird, Chris** DWR for **05/05/14** on **TRN354** to **Standalone** mode.
8. **Exit SiteManager**.

Correct the reporting error in standalone.

9. Log on in **standalone** mode as **jj00017**.
10. Correct the reporting error for contract **TRN354** on the DWR for **05/05/14**.
 - Item code: **712-06, SIGNS (CONSTRUCTION)**
 - Project Number: **67004-3213-14**
 - Line Item Nbr: **1360**
 - Template: **SM22A**
11. Change the # of **Signs** value to **4**.
12. **Exit SiteManager**.

Pipeline the corrected DWR to the server.

13. Log on in **Server** mode as **jj00017**.
14. **Pipeline** DWR date **05/05/14** for **jj00017** on **TRN354** back to **Server** mode.
15. **Exit SiteManager**.

Authorize the corrected DWR and review reports.

16. Log on in **server** mode as **jj00019**.
17. **Authorize** the corrected DWR.
18. Preview the **DWR History**, **Work Item History**, and **Contractor History** for **TRN354**.
19. **Exit SiteManager**.

Understanding Estimate Basics and Progress Estimates for Field Documentation

In this chapter, you will receive instruction about the following:

▪ Overview	2
▪ TDOT Estimate Generation Schedule	4
▪ TDOT Progress Estimate Generation Workflow	5
▪ Viewing the Estimate Summary	8
▪ Viewing Estimate Discrepancies	10
▪ Viewing the Estimate Item Detail	13
▪ Viewing the Estimate Item Paybook	15
▪ Viewing the Estimate Summary to Contractor Report	17
▪ Summary	20
▪ Review Exercise	22

Overview

The estimate generation process manages the estimate functionality from the generation of an estimate through the creation of the extract file for the transportation agency's financial system. The functionality is divided into the following areas:

- Generation of the estimate
- Review of estimate information
- Resolution of estimate discrepancies
- Review of estimate item details
- Approval of the estimate
- Tracking of estimate status

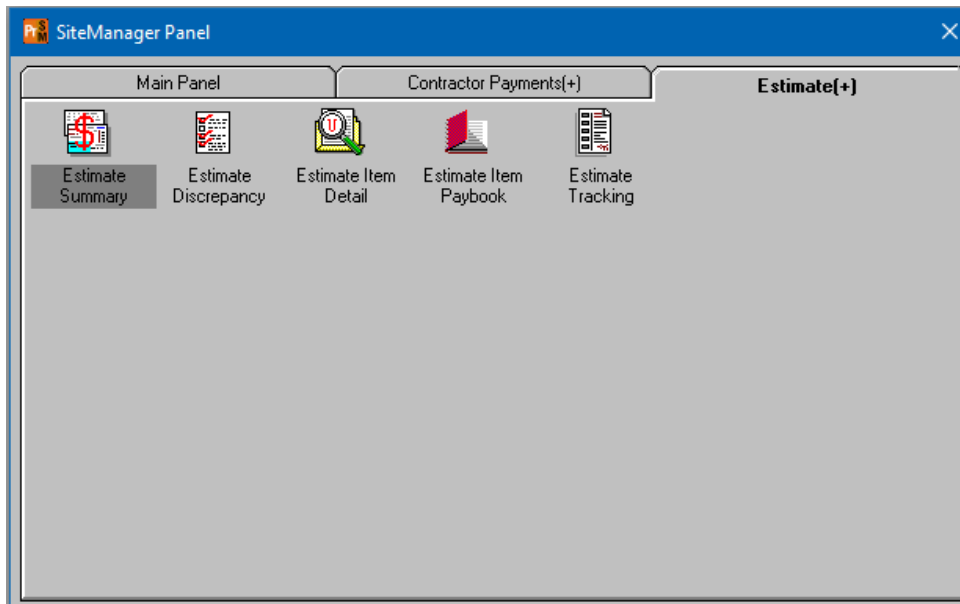


Figure 1. SiteManager Panel Window - Estimate Panel

The estimate generation process allows the user to generate an estimate for the contract. The user selects to generate a progress or a final estimate from the Contractor Payments component. The system then performs a background process which performs the following activities:

- **Delete pending estimate.** This activity deletes any previous pending estimate which has been calculated but not approved. The deletion will remove only details tied to the previous pending estimate.
- **Determine quantities for payment.** This activity will determine the quantity to be paid for each line item on the contract which has items installed for the estimate period.
- **Calculate stockpiled materials.** This activity will determine if an installed item has stockpiled materials. If it does, the process will use a stockpiled materials conversion factor to add a new line item adjustment to adjust the amount of payment which is to be made for the line item.
- **Identify discrepancies.** This activity checks for and reports 'discrepancies' for the work being performed by defined rules and conditions, e.g., physical completion dates for milestones with projected end dates during the estimate period. This activity provides a window with discrepancy details for the District Supervisor so that proactive steps can be taken for various project issues. The edits performed during the Progress estimate are a subset of the edits performed during the Final estimate.
- **Determine funding amounts.** This activity will calculate the funding amount for the different funding sources based upon the funding given for the contract, project, category or item.

TDOT Estimate Generation Schedule

The Office Staff of the unit assigned the contract generates all Progress estimates. Before the Estimate Generation and Reconciliation Cycle can begin, the Inspection staff must pipeline all DWR's through the DWR Ending Date for their region. The following table outlines the Estimate Generation schedule for each of the Regions.

Region	First DWR Date	Ending DWR Date (Estimate End Date)	First Day Office Staff Can Generate Estimate
Region 1	21st day of the previous month	Through 20th day of the current month	21st day of the current month
Region 2	1st day of the previous month	Through the last day of the previous month	1st day of the current month
Region 3	1st day of the previous month	Through the last day of the previous month	1st day of the current month
Region 4	16th day of the previous month	Through the 15th day of the current month	16th day of the current month

Table 1. TDOT Progress Estimate Generation Schedule

TDOT Progress Estimate Generation Workflow

Inspection Staff

The Inspection staff will complete the following pre-estimate planning and verification tasks prior to estimate generation:

Progress Estimate Planning & Verification Tasks	Functional Navigation
Lead Inspector/Inspector will check-in (Pipeline) all DWRs to the server through the ending DWR date as outlined in the PM to Server chapter.	Pipeline > PM to Server Pipeline
The Lead Inspector/Inspector will run the DWR Template Report to verify installed quantities are correct and the Contract Sampling Summary report to ensure all sampling & testing data has been entered. If it is a Maintenance Contract, be sure to check for missing MMS Templates on the DWR Template Report.	TDOT Custom SM Report Accessories > System Attachments
If the contract is a Maintenance Contract the inspector will access the Adjustments Plug-In to see if there are any missing MMS Templates.	Contract Administration > Contract Records > Contracts > Plug-In > Adj. Plug-In
Lead Inspector will run the Unauthorized DWR Report to find the applicable DWRs that have not been authorized.	TDOT Custom SM Report Accessories > System Attachments
As needed, Lead Inspector will run and review the DWR Template Report to help determine which unauthorized DWRs should be authorized for the estimate. Lead Inspector may also need to review the DWRs and other reports to help with this determination.	Contractor Payments > Reports > Installed Work
As needed, Lead Inspector will create any missing Diaries for the estimate period and authorize all applicable DWRs that have not been authorized to date. A Diary is to be created for each day of the period covered by the estimate for the life of the Contract.	Daily Work Reports > Daily Work Reports or Diary
Lead Inspector notifies Office Staff that all DWRs have been checked in and are ready to be included in an estimate.	External

Table 2. TDOT Estimate Planning & Verification Task

TDOT Progress Estimate Correction Workflow

If a discrepancy is displaying due to an error recorded on a DWR, the Office staff will not override the discrepancy. Instead, the Office Staff and Inspection Staff will complete the following tasks as part of the estimate correction process to update the DWR error:

Estimate DWR Correction Workflow Tasks	Functional Navigation
Office Staff will delete the pending estimate if a correction must be made to a DWR/Diary for the estimate period. If an adjustment has been made to the estimate, the adjustment plug-in must be used to place the estimate back in pending status prior to deleting the estimate.	Contractor Payments > Estimate > Estimate History
Office Staff / Lead Inspector will unauthorize the DWRs that need to be corrected. Note: DWRs created by Office Staff should be unauthorized by the Office Staff; DWRs created by Inspection Staff should be unauthorized by the Lead Inspector.	Daily Work Reports > Diary
DWR Creator (Inspectors only) will pipeline the DWR to standalone mode to correct the DWR. Note: Office Staff DWRs are created and corrected in Server mode. Inspection Staff DWRs are created and corrected in Standalone mode.	Pipeline > Server to PM
DWR Creator corrects the DWR.	Daily Work Reports > DWR
DWR Creator (Inspectors only) will pipeline the DWR to server mode after correcting the DWR	Pipeline > PM to Server
Office Staff / Lead Inspector will authorize the corrected DWR. Note: DWRs corrected by Office Staff should be authorized by the Office Staff; DWRs corrected by Inspection staff should be authorized by the Lead Inspector.	Daily Work Reports > Diary
Office Staff will generate the Estimate and repeat the Progress Estimate Generation Workflow.	Contractor Payments > Estimates > Generate Estimate

Table 3. TDOT Progress Estimate Correction Workflow

EVERY EFFORT SHOULD BE MADE TO CORRECT THE ESTIMATE PRIOR TO RUNNING THE ADJUSTMENT PLUG-INS FOLLOWING THE WORKFLOW ABOVE. ONLY AFTER BEING SATISFIED THAT THE ITEM QUANTITIES ARE CORRECT SHOULD THE OFFICE STAFF RUN THE ADJUSTMENT PLUG-INS TO ADJUST THE PAY AMOUNT OF THE ESTIMATE.



Exercise 1

In this exercise, navigate to the Estimate panel.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**

1. Start and log onto SiteManager as user **jj00041** *while connected in server mode.*
2. On the **Main Panel** panel, double-click the **Contractor Payments** icon. The system displays the Contract Payments panel.
3. Double-click the **Estimate** icon. The system displays the Estimate panel.

SHIFT-TAB IF
USER ID NOT
HIGHLIGHTED.

You've navigated to the Estimate panel.

Viewing the Estimate Summary

The Estimate Summary window allows the User to view calculated Estimate summary information. It may be accessed from the Estimate panel or from the In-Box. The window shows three sets of totals:

- Previous Estimate(s) - Combined totals for previous Estimate(s)
- This Estimate – totals for the current Estimate
- Totals to Date – combined totals for all Estimates

The screenshot shows a window titled "Estimate Summary" with the following data:

	Previous Estimate(s) (\$)	This Estimate (\$)	Total (\$) To Date
Item Earnings:	\$515,500.00	\$1,437,229.52	\$1,952,729.52
Participating:	\$515,500.00	\$1,437,229.52	\$1,952,729.52
Non - Participating:	\$0.00	\$0.00	\$0.00
Retainage:	\$0.00	\$0.00	\$0.00
Stockpiled Materials:	\$0.00	\$0.00	\$0.00
Incentive:	\$0.00	\$0.00	\$0.00
Disincentive:	\$0.00	\$0.00	\$0.00
Liquidated Damage:	\$0.00	\$0.00	\$0.00
Other Adjustments:	\$0.00	(\$25,218.44)	(\$25,218.44)
Paid To Contractor:	\$515,500.00	\$1,412,011.08	\$1,927,511.08

Below the table, there is a "Discrepancies" section with the following options:

Deficient Payrolls: Civil Rights Rpt. Deficiency: Item: Other:

Subcontractors Paid:

Figure 2. Estimate Summary Window



Exercise 2

In this exercise, view the Estimate Summary window.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**

1. On the **Estimate** panel, double-click the **Estimate Summary** icon. The system displays the Select Contract and Estimate window.
2. In the **Contract** area, in the **Contract ID** column, scroll to and double-click **TRN370d**.
3. In the **Estimate** area, in the **Estimate** column, double-click **0002**. The system displays the Estimate Summary window.
4. What is the amount paid to the contractor on this estimate?

5. Are there discrepancies on this estimate?

6. **Close**. The system closes the Estimate Summary window and displays the Estimate panel.

You've viewed the Estimate Summary window.

Viewing Estimate Discrepancies

SiteManager identifies the discrepancies associated with an estimate and displays them in the Estimate Discrepancy window. The discrepancies are of two levels: discrepancies at the Estimate level and discrepancies at the item level. For instance, if a Checklist Event Date is not met, the discrepancy is associated to the Estimate. If an item overrun is displayed, the discrepancy is associated with the specific line item.

Estimate discrepancies are listed at the top of the Estimate Discrepancy window, and the item discrepancies are listed after them. The Status field values are either 'Unresolved' or 'Override.' When the Recalculate Discrepancies function is selected from the Services menu, or if the estimate is regenerated, the discrepancies are re-determined.

TWO OPTIONS WITH DISCREPANCIES:

OVERRIDE WITH COMMENT

RESOLVE AND RECALCULATE

The screenshot shows a window titled "Estimate Discrepancies" with a search bar containing "Contract ID: TRN370d", "Estimate Nbr: 0002", and "Status: INAP". Below the search bar is a table with the following data:

Description	Status	By	Resolve Date	Resolve Time
Major Item 67004-3213-14/2690 exceeds Overrun Limits.	Override	jj00002	09/21/16	13:03:36
Line Item # 67004-3213-14/0630 has a deficient tested matl disc	Override	jj00002	09/21/16	13:05:53
Line Item # 67004-3213-14/0670 has a deficient tested matl disc	Override	jj00002	09/21/16	13:04:34
Line Item # 67004-3213-14/0700 has a deficient tested matl disc	Override	jj00002	09/21/16	13:06:17
Line Item # 67004-3213-14/2690 has a deficient tested matl disc	Override	jj00002	09/21/16	13:06:23

Figure 3. Estimate Discrepancies Window

TDOT Discrepancy Types

There are four types of discrepancies utilized at TDOT. Each are identified using different criteria.

- **Overrun Discrepancy** – Occurs if a major item is overrun by 10% or more and a minor item overrun by 999.99% or more.
- **Milestone Completion Date Missed Discrepancy** – Occurs if a milestone has not been completed within the time frame specified on the Milestones window.
- **Contract Completion Date Missed Discrepancy** – Occurs if work is recorded on a DWR beyond the Contract Completion Date specified on the Contracts window/Critical Dates folder tab.
- **Checklist Event Completion Date Missed Discrepancy** – Occurs if the Actual Date of the Checklist Event has not been entered on the Checklist Event Dates window within the time frame specified on the Checklist Scheduled Events window.
- **Deficient Tested Mtl Discrepancy** – Occurs if the Sampling & Testing Requirements are not met.

IF AN ESTIMATE DISCREPANCY ON A PROGRESS ESTIMATE CANNOT BE RESOLVED, THE DISCREPANCY MUST BE OVERRIDDEN WITH AN EXPLANATION EXCEPT FOR A CHECKLIST EVENT.



Exercise 3

In this exercise, view the Estimate Discrepancies window.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN370d; 002 (estimate)**

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon. The system displays the Estimate Discrepancies window.

View a discrepancy.

2. In the **Description** column, select **Major Item 67004-3213-14/2690 exceeds Overrun Limits.**
3. On the toolbar, click the **Remarks** button. The system displays the Remarks window.
4. What is the reason for this override?

5. Click the **Remarks** button again. The system closes the Remarks window.

View another discrepancy.

6. In the **Description** column, select **Line Item # 67004-3213-14/0630 has a deficient tested matl discrepancy.**
7. On the toolbar, click the **Remarks** button. The system displays the Remarks window.
8. What is the reason for this override?

9. Click the **Remarks** button again. The system closes the Remarks window.
10. **Close.** The system closes the Estimate Discrepancies window and displays the Estimate panel.

You've viewed the Estimate Discrepancies window.

Viewing the Estimate Item Detail

The Estimate Item Detail window displays the Item quantities from approved Daily Work Reports.

The screenshot shows the 'Estimate Item Detail' window with the following data:

Project Nbr	Line Item Number	Item Code	Item Description	Qty Installed This Est.	Amt Installed This Est.
67004-3213-14	2690	615-01.12	PRESTRESSED CONCRETE BULB 1	5500.000	\$946,000.00
67004-3213-14	1670	717-01	MOBILIZATION	0.500	\$365,500.00
67004-3213-14	2030	801-01.65	TEMPORARY MULCH	88.340	\$1,060.08

	Quantity	Amount	
Bid:	4,820.000	829,040.00	Unit Price: 172.00000
Current:	4,820.000	829,040.00	Unit of Measure: Linear Feet
Pending CO:	.000	.00	
Notified Qty:	4,820.000	829,040.00	
Projected Qty:	4,820.000	829,040.00	
Installed To Date:	5,500.000	946,000.00	
Installed This Est:	5,500.000	946,000.00	
Paid Previously:	.000	0.00	Discrepancies
Pay This Est:	5,500.000	946,000.00	Deficient Tested Materials Ind: <input type="checkbox"/>
Paid To Date:	5,500.000	946,000.00	Exceeds Allowed Overrun Ind: <input type="checkbox"/>

Figure 4. Estimate Item Detail Window

THE DISCREPANCY INDICATORS ONLY DISPLAY WHEN VIEWING ONE PENDING ESTIMATE, RATHER THAN ALL.

THE OFFICE STAFF AND DISTRICT SUPERVISOR MAY VIEW THE ESTIMATE ITEM DETAIL WINDOW TO VERIFY THE ITEM QUANTITIES FOR PAYMENT ON THE ESTIMATE.

NOTE: IF THERE IS NO PENDING OR REJECTED ESTIMATE FOR THE CONTRACT, YOU WILL SEE CUMULATIVE TOTALS FOR ALL ITEMS ON ESTIMATES



Exercise 4

In this exercise, view the Estimate Item Detail window for all items on a contract.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN370d; 002 (estimate)**

1. On the **Estimate** panel, double-click the **Estimate Item Detail** icon. The system displays a message to inform you that no pending or rejected estimates exist for this contract.
2. To see items for all estimates, click **Yes**. The system displays the Estimate Item Detail window.

Change the contract.

3. On the toolbar, click the **Open** button. The system displays the Contract window.
4. In the **Contract ID** column, scroll to and double-click **TRN370e**. The system displays the Estimate Item Detail window.

View an item.

5. Scroll to and select the following row:

Project Nbr **67004-3213-14**, Line Item Number **2650**,
Item Code **606-02.03**, Description **Steel Piles (10 INCH)**
6. What quantity was installed to date for this item? _____
7. What quantity was paid to date for this item? _____

View another item.

8. Scroll to and select the following row:

Project Nbr, **67004-3213-14** Line Item Number **2690**,
Item Code **615-01.12**, Description **PRESTRESSED
CONCRETE BULB TEE BEAM (6" WEB)(BT-72)**
9. What quantity was installed to date for this item? _____
10. What quantity was paid to date for this item? _____

View yet another item.

11. Scroll to and select the following row:

Project Nbr **67004-3213-14**, Line Item Number **0700**,
Item Code **307-01.08**, Description **ASPHALT CONCRETE
MIX (PG64-22) (BPMB-HM) GRADING B-M2**

12. What quantity was installed to date for this item? _____
13. What quantity was paid to date for this item? _____

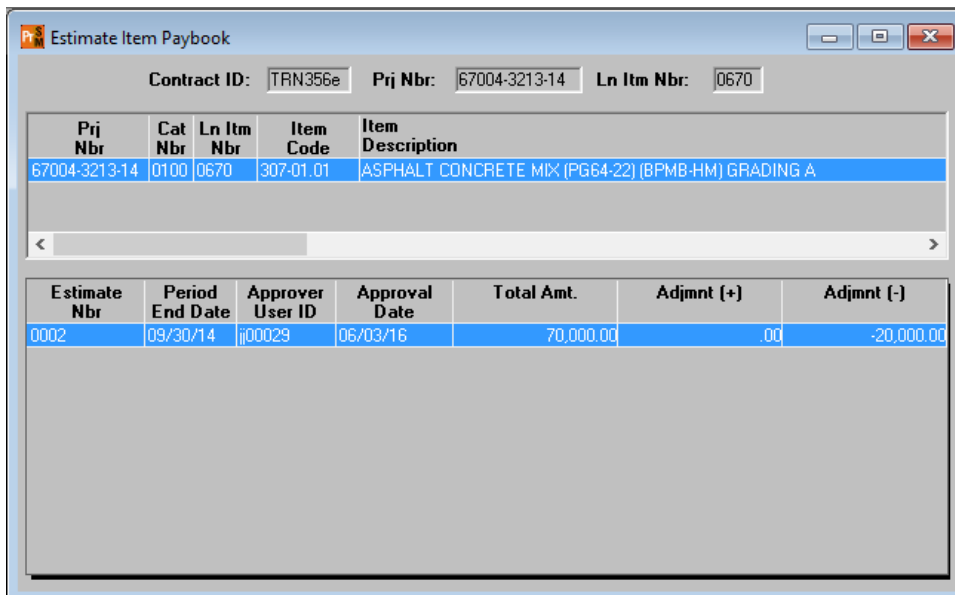
Prepare for the next exercise.

14. **Close.** The system closes the Estimate Item Detail window and displays the Estimate panel.

You've viewed the estimate item details for an estimate on a contract.

Viewing the Estimate Item Paybook

The Estimate Item Paybook is an inquiry only window showing the payment history for a Contract Item. The Item payment history displays in reverse chronological order meaning the current Estimate Item displays on the first row. Thus, it is possible that the first row is not yet paid. Whether the first row is paid or not can be determined by the Approver User ID. If the Approver User ID is the final reviewer (HQ Finance), then the item has been paid.



The screenshot shows a window titled "Estimate Item Paybook" with the following fields: Contract ID: TRN356e, Prj Nbr: 67004-3213-14, Ln Itm Nbr: 0670. Below these fields is a table with the following data:

Prj Nbr	Cat Nbr	Ln Itm Nbr	Item Code	Item Description
67004-3213-14	0100	0670	307-01.01	ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A

Below this table is a scroll bar. At the bottom of the window is another table with the following data:

Estimate Nbr	Period End Date	Approver User ID	Approval Date	Total Amt.	Adjmnt (+)	Adjmnt (-)
0002	09/30/14	00029	06/03/16	70,000.00	00	-20,000.00

Figure 5. Estimate Item Paybook Window

THE ESTIMATE ITEM PAYBOOK MAY BE USED TO CHECK AMOUNTS PAID ON EACH ESTIMATE FOR AN ITEM.



Exercise 5

In this exercise, view the Estimate Item Paybook window for an estimate on a contract.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN370e; 002** (estimate)

1. On the **Estimate** panel, double-click the **Estimate Item Paybook** icon. The system displays the Select Contract and Line Item window.
2. In the **Contract ID** column, scroll to and double-click **TRN356e**.

View an item.

3. In the **Line Item** area, scroll to and double-click the following row:

Ln Itm Nbr **0700**, Project **67004-3213-14**
Item Code **307-01.08** Description **ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING B-M2**
4. Has an adjustment been applied to this item? _____

View yet another item.

5. Click **Open**. The system displays the Select Contract and Line Item window.
6. In the **Line Item** area, scroll to and double-click the following row:

Ln Itm Nbr **0670**, Project **67004-3213-14**
Item Code, **307-01.01** Description **ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A**
7. Has an adjustment been applied to this item? _____

Prepare for the next exercise.

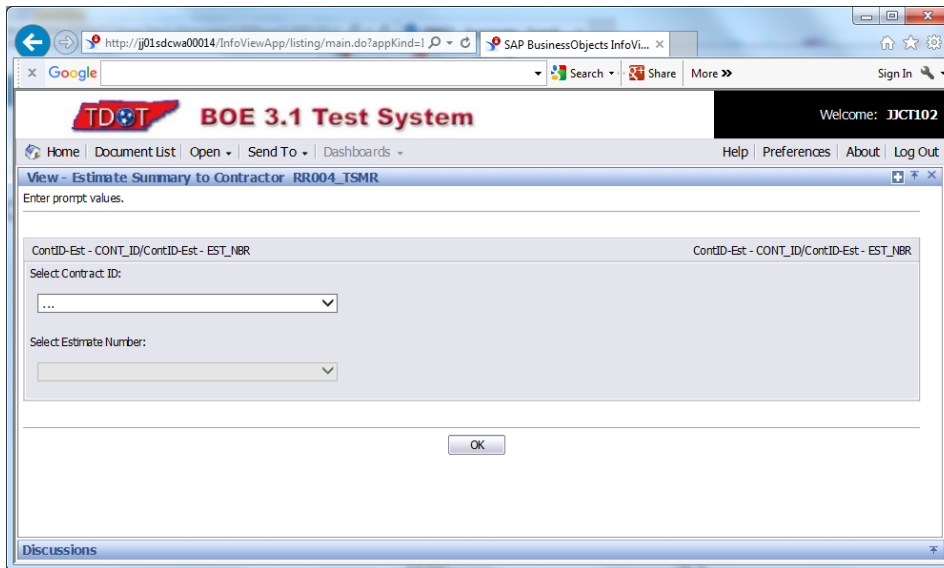
8. **Close**. The system closes the Estimate Item Paybook window and displays the Estimate panel.
9. Click the **Contractor Payments** tab. The system displays the Contract Payments panel.

You've viewed the Estimate Item Paybook for an estimate on a contract.

Viewing the Estimate Summary to Contractor Report

The BOE report, *Estimate Summary to Contractor*, displays the amounts to be paid to the contractor based on the estimate. The report summarizes previous payments made to the contractor and the status of the contract when the estimate is generated. An itemized description of quantities and amounts on all items in every project contained in the estimate is also given.

Navigation: Accessories > System Attachments > SM Reports (BOE reports)




The screenshot shows a web browser window displaying the 'BOE 3.1 Test System' interface. The page title is 'View - Estimate Summary to Contractor: RR004_TSMR'. The user is logged in as 'JCT102'. The main content area contains a form with the following elements:

- A header bar with the TDOT logo and 'BOE 3.1 Test System' text.
- A navigation menu with 'Home', 'Document List', 'Open', 'Send To', and 'Dashboards'.
- A 'Welcome: JCT102' message in the top right corner.
- A 'View - Estimate Summary to Contractor: RR004_TSMR' title bar.
- A prompt area with the text 'Enter prompt values.'.
- A form with two dropdown menus: 'Select Contract ID:' and 'Select Estimate Number:'. The 'Select Contract ID:' dropdown shows '...'.
- An 'OK' button at the bottom of the form.
- A 'Discussions' link at the bottom left of the page.

Figure 6. BOE Report - Estimate Summary to Contractor - Prompts

Print Date: 06/03/2016
JJCT102

STATE OF TENNESSEE
DEPARTMENT OF TRANSPORTATION
Estimate Summary to Contractor Report



Contract: TRNING Estimate Number: 0002 Estimate Type: Progress Pay Period: 9/1/2014 to 09/30/2014

Contractor: Highways, Inc. Contractor's Address: 1623 Galleria Boulevard Brentwood, TN 37027	Time Allowed: 715.0 Days Charged: 137.0 Days Elapsed Calendar Days: 137.0 Days Percent Time: 19.16 % Percent Complete(\$): 9.02 % Percent Behind: 10.14 %
Contract Location: THE CONSTRUCTION ON SR 84	Dates Let: 03/29/2014 Awarded: 04/16/2014 Contract Executed: 05/16/2014 Date Notice to Proceed: 05/17/2014 Work Began: 08/01/2014 To Be Completed: 04/30/2016 Substantial Work Complete: Accepted:
Counties: OVERTON	
Project(s): 67004-3213-14	


	Total to Date	Previous to Date	This Estimate		Amounts
Total Earnings:	\$1,983,856.74	\$515,500.00	\$1,468,356.74	Current Contract:	\$14,657,837.81
Stockpiled Materials:	\$0.00	\$0.00	\$0.00	Original Contract:	\$14,657,837.81
Amount Due:	\$1,983,856.74	\$515,500.00	\$1,468,356.74		
Test Report Payment Adjustments:	\$0.00	\$0.00	\$0.00		
Material Discrepancy Adjustments:	\$-20,000.00	\$0.00	\$-20,000.00		
Payment Due:	\$1,963,856.74	\$515,500.00	1,448,356.74		

RR004 Page 1

Figure 7. BOE Report - Estimate Summary to Contractor [RR004] (initial page)

Print Date: 06/03/2016
JJCT102

STATE OF TENNESSEE
DEPARTMENT OF TRANSPORTATION
Estimate Summary to Contractor Report



Project Number	Cat #	Line Item #	Item Code	Units	Primary/ Supplemental Description	Total Item Quantity	Total Amount
67004-3213-14	0100	0610	209-65.01	LS	TEMPORARY STREAM DIVERSION (DESCRIPTION)	Bid: 1.000 This Est: 0.000 Total: 0.000	Unit Price: \$10,000.000 This Est: \$0.000 Total: \$0.000
67004-3213-14	0100	0620	209-65.03	L.F.	TEMPORARY DIVERSION CHANNEL	Bid: 558.000 This Est: 0.000 Total: 0.000	Unit Price: \$10.000 This Est: \$0.000 Total: \$0.000
67004-3213-14	0100	0630	303-01	TON	MINERAL AGGREGATE, TYPE A BASE, GRADING D	Bid: 123,731.000 This Est: 2,600.000 Total: 2,600.000	Unit Price: \$12.000 This Est: \$31,200.000 Total: \$31,200.000
67004-3213-14	0100	0640	303-01.01	TON	GRANULAR BACKFILL (ROADWAY)	Bid: 1,068.000 This Est: 0.000 Total: 0.000	Unit Price: \$15.000 This Est: \$0.000 Total: \$0.000
67004-3213-14	0500	2570	303-01.02	TON	GRANULAR BACKFILL (BRIDGES)	Bid: 78.000 This Est: 0.000 Total: 0.000	Unit Price: \$40.000 This Est: \$0.000 Total: \$0.000
67004-3213-14	0100	0660	303-10.01	TON	MINERAL AGGREGATE (SIZE 57)	Bid: 1,698.000 This Est: 0.000 Total: 0.000	Unit Price: \$18.000 This Est: \$0.000 Total: \$0.000
67004-3213-14	0100	0670	307-01.01	TON	ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A	Bid: 11,179.000 This Est: 1,400.000 Total: 1,400.000	Unit Price: \$50.000 This Est: \$70,000.000 Total: \$70,000.000
	0100	0670	ADJUSTMENT		Material Discrepancy Payment Adjustme	Adj This Est: -400.000 Adj Total: -400.000	Adj This Est: -20,000.000 Adj Total: -20,000.000

RR004 Page 14

Figure 8. BOE Report - Estimate Summary to Contractor [RR004] (detail of subsequent page)

THE OFFICE STAFF / DISTRICT SUPERVISOR WILL REVIEW THE ESTIMATE SUMMARY TO CONTRACTOR REPORT TO ENSURE THAT THE LINE ITEM PAYMENT IS CORRECT AND TO ENSURE THE ITEM CATEGORIES ARE CORRECT. IF CHANGES ARE REQUIRED, THE OFFICE STAFF WILL FOLLOW THE ESTIMATE CORRECTION PROCEDURE. REMINDER: IF THE ESTIMATE MUST BE RE-GENERATED, THE ESTIMATE MUST FIRST BE RETURNED TO PENDING STATUS IN THE ADJUSTMENTS PLUG-IN BEFORE THE ESTIMATE IS DELETED AND GENERATED AGAIN.



Exercise 6

In this exercise, view the BOE report, *Estimate Summary to Contractor*, for an estimate on a contract.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN356e**

Note: For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to answer the questions.

1. *In Figure 7, what is the amount due to the contractor before adjustments on this estimate? _____*
2. *In Figure 7, are there any material discrepancies adjustments on this estimate? _____ .*
3. *In Figure 7, what is the amount of the material discrepancies adjustments on this estimate? _____*
4. *In Figure 7, are there any stockpile payments on this estimate? _____*
5. *In Figure 8, for line item number 0670, item code 307-01.01, what is the total quantity installed on this estimate? _____*
6. *In Figure 8, for line item number 0670, item code 307-01.01, what is the total quantity deducted? _____*
7. *In Figure 8, for line item number 0670, item code 307-01.01, what is the total amount for the material discrepancy adjustment? _____*

You've viewed the Estimate Summary to Contractor report.

Summary

To access Contractor Payment reports:

1. On the **Contractor Payments** panel, double-click the **Reports** icon.
2. Double-click the icon for the desired report.

To navigate to the Contractor Payments panel:

1. On the **Main Panel** panel, double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

To navigate to the Estimate panel:

1. On the **Contractor Payments** panel, double-click the **Estimate** icon. The system displays the Estimate panel.

To open an estimate summary:

1. On the **Estimate** panel, double-click the **Estimate Summary** icon.
2. Click **Open**.
3. In the **Contract** list box, scroll to and double-click the desired contract.

To open an estimate discrepancy:

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon.
2. In the list box, scroll to and double-click the desired contract.
3. In the list box, scroll to and double-click the desired estimate.

To view an estimate item:

1. On the **Estimate** panel, double-click the **Estimate Item Detail** icon. The system displays the Contract window.
2. In the **Contract** area, scroll to and double-click the desired contract. The system displays the Estimate Item Detail window.
3. From the **Service** menu, click **View Estimate**.

To view the estimate item paybook:

1. On the **Estimate** panel, double-click the **Estimate Item Paybook** icon. The system displays the Select Contract and Line Item window.
2. In the **Contract** area, scroll to and double-click the desired contract.
3. In the **Line Item** area, scroll to and click the desired line item.

Review Exercise

In this exercise, review an estimate for a contract.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN356e**

1. Navigate to the Estimate Summary window for contract **TRN370c** estimate **0002**.
2. What are the item earnings for estimate **0002**? _____
3. Are there discrepancies on estimate **0002**? _____
4. Navigate to the Estimate Discrepancy window.
5. What types of discrepancies exist on this estimate?

6. Navigate to the Estimate Item Detail window.
7. View estimate item details for the following:
Item Code **307-01.01**, Line Item Number **0670**,
ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM)
GRADING A.
8. What quantity was installed to date? _____
9. What is the purpose of the *Summary to Contractor* report?

10. **Exit SiteManager.**

You've reviewed an estimate for a contract.

Performing Contract Midlife Activities for Field Documentation

In this chapter, you will receive instruction about the following:

- Understanding Dates in SiteManager 2
- Viewing Checklist Event Dates 3
- Viewing a Key Date 5
- Correcting Quantities for Approved Progress Estimates 8
- Viewing DWRs Created by the 'Quantity Correction' Plug-in 13
- Summary 16
- Review Exercise 18

Understanding Dates in SiteManager

Since dates are very important in the life of a highway construction contract, they are important in SiteManager. Four of the most important types of dates in SiteManager are as follows:

- Critical Dates (of the Contract window)
- Key Dates
- Checklist Event Dates
- Milestone Dates

CRITICAL DATES ARE NOT UPDATED BY FIELD PERSONNEL.

The first three, Critical Dates, Key Dates, and Checklist Events are very powerful because they can send SiteManager Inbox messages as reminders to an individual recipient or to a distribution list of recipients.

Distribution List: <input style="width: 90%;" type="text"/>	Recipient: <input style="width: 90%;" type="text"/>
Message Text: <input style="width: 100%;" type="text"/>	

Figure 1. Standard Messages Based on Data Type

TDOT USES RECIPIENTS ONLY AND NOT DISTRIBUTION LISTS.

Date Type	When the Message Is Sent	Recipient	Message Text
Critical Dates (Single Occurrence)	When a value is entered in the Actual Date Field by a Headquarters User.	In-box of the Recipient.	The text defined in the <i>Message Text</i> field.
Key Date (Single Occurrence)	When the Projected Date of the Key Date is reached before the Actual Date is entered.	In-box of the user whose User ID is identified in the Project Manager field on the Primary Personnel folder tab of the Contract window.	The projected date was missed.
	When a value is entered in the Actual Date Field by a User.	In-box of the Recipient.	The text defined in the <i>Message Text</i> field.
Checklist Event Dates (May be used for multiple occurrences)	When the Projected Date of the Checklist Event is reached before the Actual Date is entered.	In-box of the Recipient.	The text defined in the <i>Message Text</i> field.
Milestone	When the Scheduled Completion Date is reached before the Actual Completion Date entered.	Message appears in the Estimate Discrepancy window after estimate is generated for the period in which the milestone was missed.	<i>Milestone XXX is not reached</i>

Table 1. SiteManager Dates

Viewing Checklist Event Dates

The Checklist Event Dates window lists the scheduled events for the selected contract. The data for the event selected in the upper pane is displayed in the lower pane. The data shows a chronological history of each occurrence of a repetitive scheduled event and the actual date recorded by the Office Staff for each occurrence. This window lets the Office Staff record the actual dates of the checklist scheduled events and add or delete checklist event date records.

RECIPIENTS ARE NOTIFIED WHEN A SCHEDULED EVENT DOES NOT OCCUR ON TIME.

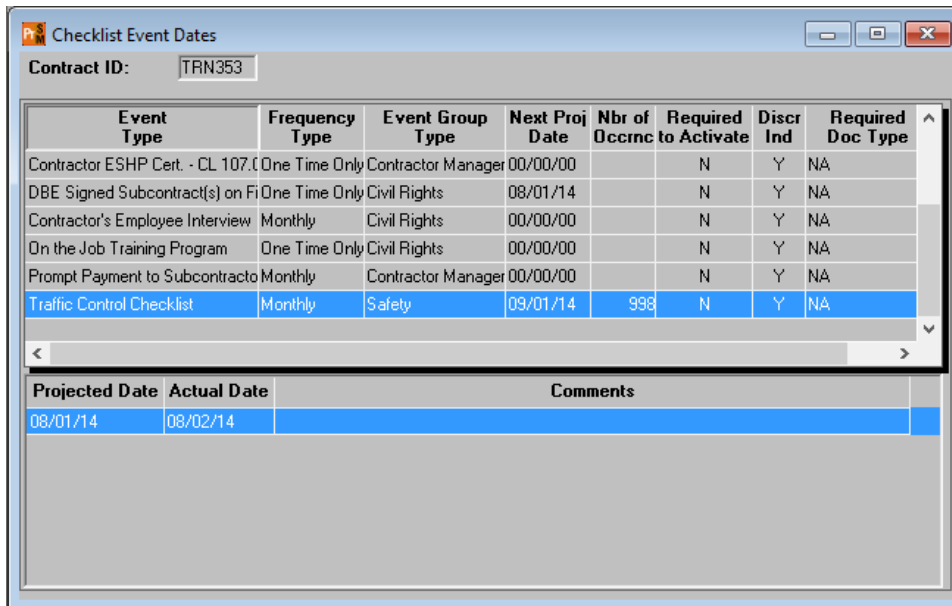


Figure 2. Checklist Event Dates Window



Exercise 1

In this exercise, view the actual date of checklist events.

User ID **jj00001** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**

1. Start and log onto SiteManager as user **jj00001** *while connected in server mode.*
2. On the **Main Panel** panel, double-click the **Contract Administration** icon. The system displays the Contract Administration panel.
3. Double-click the **Contract Records** icon. The system displays the Contract Records panel.
4. Double-click the **Checklist Event Dates** icon. The system displays the Select Contract window.
5. In the **Contract ID** column, double-click **TRN353**. The system displays the Checklist Event Dates window.
6. In the **Event Type** column, scroll to and select **DBE Signed Subcontract(s) on File**. In the lower pane, the system displays the actual date recorded by the Office Staff.
7. In the **Event Type** column, scroll to and select **Traffic Control Checklist**. In the lower pane, the system displays the actual date recorded by the Office Staff.
8. **Close**. The system closes the Checklist Event Dates window and displays the Contract Records panel.

You've viewed the actual date of checklist events.

Viewing a Key Date

Key dates are dates that are important *when they occur*. Therefore, a single recipient is notified when a key date is accomplished. The Project Manager is notified when a key date is *not* accomplished by the projected date. A key date can be set up to be required either when the contract is activated or when it is finalized. the user creates the key date schedule and records the actual occurrences of key dates on the Key Dates window.

THE RECIPIENT IS NOTIFIED WHEN ENTERED AND IF NOT ENTERED.

The Key Dates window displays the key dates for the selected contract in the upper pane. The data for the selected key date is displayed in the lower window. The key date types are pre-defined in the system code tables. The system adds a set of default key dates automatically to each new contract. The user creates the key date schedule and records the actual occurrence of key dates on this window. The user can add, modify, and delete the key dates.

The screenshot shows the 'Key Dates' window for Contract ID TRN353. It features a table with columns: Key Date Type, Projected Date, Actual Date, Required to Activate, and Required to Finalize. The 'Starting Notice' row is highlighted. Below the table, there are input fields for 'Key Date Type' (set to 'Starting Notice'), 'Projected Date' (05/14/14), 'Actual Date' (05/21/14), 'Distribution List', and 'Recipient' (jr00019). There are also checkboxes for 'Required to Activate' and 'Required to Finalize', and a 'Message Text' field containing: 'Projected Date Above = Effective Date, Actual Date Above = Work Begin Date'.

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Contract Materials Ready	00/00/00	00/00/00	N	N
Completion Notice (Date Time Stopped)	00/00/00	00/00/00	N	N
Final Inspection	00/00/00	00/00/00	N	N
Field Prep Complete	06/01/14	00/00/00	N	N
Final Records Submittal	00/00/00	00/00/00	N	N
DT1696 Materials and Tests Certification	00/00/00	00/00/00	N	N
Notice of Termination	00/00/00	00/00/00	N	N
Starting Notice	05/14/14	05/21/14	N	N

Figure 3. Key Dates Window

THE HEADQUARTERS FINANCE OFFICE UPDATES THE NOTICE TO PROCEED DATE UPON RECEIPT OF THE STARTING NOTICE REPORT.

UNTIL THE NOTICE TO PROCEED DATE IS ENTERED, FIELD DATA COLLECTION CAN BEGIN, BUT ESTIMATES CANNOT BE GENERATED.

Key Date	Recipient	Fed/ State	Enters Date	Comment
CC-3	District Supervisor designee	Fed	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates) All CC-3's have been received.
Completion Notice (Date Time Stopped)	District Supervisor	Both	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates) Time charges have been stopped. The final inspection and all exceptions are complete.
Contract Materials Ready	Regional M&T Supervisor	Both	Regional M&T Designee	Projected & Actual Date = Date Contract Materials are generated
DT1696 Materials and Tests Certification	District Supervisor designee	Both	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates). DT1696 Materials and Tests certification submitted to Regional Materials and Tests.
Field Prep Complete	District Supervisor	Both	Office Staff	Projected Date = Effective Date. Contract ready for field documentation.
Final Inspection	District Supervisor designee	Both	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates). Final Inspection completed this date as inspected and Accepted Date.
Final Records Submittal	District Supervisor designee	Both	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates) Project Records have been submitted to Final Records.
Notice of Termination	District Supervisor designee	Both	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates). NOT form complete. Submit Field Office Completion Notice Report.
Starting Notice	District Supervisor designee	Both	Office Staff	Projected Date = Effective Date. Used to generate the Starting Notice report which notifies HQ Finance to fill in the Notice to Proceed and Work Begin Dates (from Critical Dates)

Table 2. TDOT Default Key Dates



Exercise 2

In this exercise, view the key dates for a contract.

User ID	jj00001	Password	pass
Connection	Training Server		
Group Name	FIELD - Operations Inspector [INSP]		
Prior Keys	TRN353		

1. On the **Contract Records** panel, double-click the **Key Dates** icon. The system displays the Key Dates window.
2. In the **Key Date Type** column, select **Starting Notice**.
3. Has this date occurred? _____
4. Why is this date important? _____
5. **Close**. The system closes the Key Dates window and displays the Contract Records panel.

You've viewed the key dates for a contract.

Correcting Quantities for Approved Progress Estimates

Use the Quantity Correction plug-in to adjust pay item quantities on Progress estimates that have reached final approval. Note that quantities on Final estimates may not be adjusted after the estimate is approved.

The screenshot shows a software window titled "Quantity Adjustments". At the top, there are fields for "Contract ID: CNB022R", "Inspector: j05752", and "DWR Date of Incorrect Qty: 4/28/2005". Below this is a table with the following columns: Project Number, Category Number, Line Item Number, Item Code, Description, Location, Placed Quantity, and Loc Seq Nbr. The table contains one row with the following data: Project Number 55019-3220-94, Category Number 0100, Line Item Number 0010, Item Code 105-01, Description CONSTRUCTION STAKES, LINES AND GRADES, Location Bridge #2, Placed Quantity 0.400, and Loc Seq Nbr 1. Below the table, there are three input fields: "Correct Quantity: 4.000", "Incorrect Qty Previously Paid: 0.400", and "Adjustment: 3.600". At the bottom, there is a "Remarks/Calculations:" field with a text area containing "Corrected typo that resulted in an incorrect quantity being recorded." and "Save" and "Cancel" buttons.

Project Number	Category Number	Line Item Number	Item Code	Description	Location	Placed Quantity	Loc Seq Nbr
55019-3220-94	0100	0010	105-01	CONSTRUCTION STAKES, LINES AND GRADES	Bridge #2	0.400	1

Correct Quantity: 4.000 Incorrect Qty Previously Paid: 0.400 Adjustment: 3.600

Remarks/Calculations:
(254 Max Length) Corrected typo that resulted in an incorrect quantity being recorded.

Save Cancel

Figure 4. Quantity Correction Plug-in – Quantity Adjustments Window

ONLY THE ORIGINATOR OF THE DWR CAN MODIFY ANY OF THE QUANTITIES ON THAT DWR USING THE QUANTITY CORRECTION PLUG-IN.

A DWR QUANTITY CAN ONLY BE CORRECTED ONE TIME USING THE QUANTITY CORRECTION PLUG-IN.

THE QUANTITY CORRECTION PLUG-IN CREATES A SYSTEM GENERATED DWR. THIS DWR MUST BE AUTHORIZED BEFORE THE CORRECTION IS INCLUDED ON AN ESTIMATE.



Exercise 3

In this exercise, adjust an incorrect quantity on an approved DWR in the Quantity Correction plug-in.

User ID **jj00001** Password **pass**
Connection **Training Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN353**

Open the contract and Quantity Correction plug-in.

1. On the **Contract Records** panel, double-click the **Contracts** icon. The system displays the Contracts window.
2. Click the **Attachments** icon. The system displays the Attachments window.

Note: The remaining italicized steps cannot be completed in the training environment. The following steps and screen shots demonstrate the process steps.

3. Double-click the **Qty Correction** plug-in. The system displays the Quantity Adjustments window with the contract and inspector automatically selected.

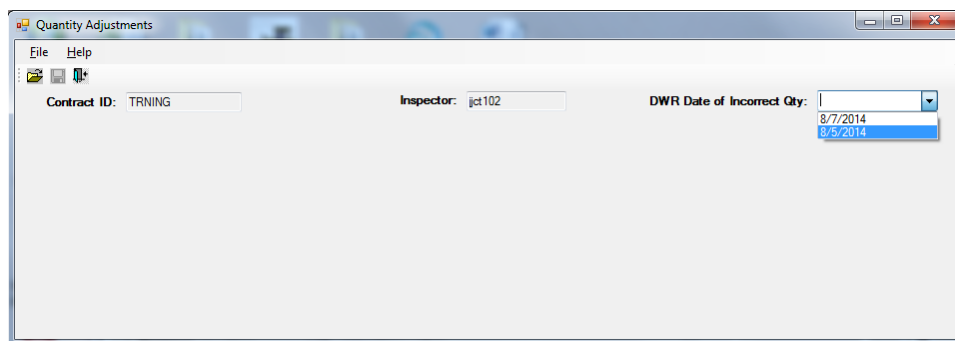


Figure 5. Quantity Adjustments Window

4. In the **DWR Date of Incorrect Qty** field, select **08/05/2014**, the DWR with the incorrect quantity. The system displays the work items recorded on the DWR for the selected date.

The screenshot shows a software window titled "Quantity Adjustments". At the top, there are three input fields: "Contract ID: TRNING", "Inspector: jct102", and "DWR Date of Incorrect Qty: 8/5/2014". Below these is a table with the following columns: Project Number, Category Number, Line Item Number, Item Code, Description, Location, Placed Quantity, and Loc Seq Nbr. The first row is highlighted in blue and contains the following data: Project Number: 67004-3213-14, Category Number: 0100, Line Item Number: 0010, Item Code: 105-01, Description: CONSTRUCTION STAKES, LINES AND GRADES, Location: Main Road, Placed Quantity: 1.000, and Loc Seq Nbr: 1. Below the table, there are three input fields: ".Correct Quantity", "Incorrect Qty Previously Paid: 1.000", and "Adjustment:". At the bottom, there is a text area labeled "Remarks/Calculations: (500 Max Length)" and two buttons: "Save" and "Cancel".

Project Number	Category Number	Line Item Number	Item Code	Description	Location	Placed Quantity	Loc Seq Nbr
67004-3213-14	0100	0010	105-01	CONSTRUCTION STAKES, LINES AND GRADES	Main Road	1.000	1

Figure 6. Quantity Adjustments Window

5. Select the following row for the DWR item with the incorrect placed quantity:

*Project Number 67004-3213-14, Category Number 0100,
Line Item Number 0010, Item Code 105-01,
Description CONSTRUCTION STAKES, LINES AND GRADES,
Location Main Road.*

The system displays an area to make the correction.

The screenshot shows a software window titled "Quantity Adjustments". At the top, there are fields for "Contract ID: TRNING", "Inspector: jct102", and "DWR Date of Incorrect Qty: 8/5/2014". Below this is a table with the following columns: Project Number, Category Number, Line Item Number, Item Code, Description, Location, Placed Quantity, and Loc Seq Nbr. The first row is highlighted in blue and contains the values: 67004-3213-14, 0100, 0010, 105-01, CONSTRUCTION STAKES, LINES AND GRADES, Main Road, 1.000, and 1. Below the table, there are three input fields: "Correct Quantity" with the value 0.400, "Incorrect Qty Previously Paid" with the value 1.000, and "Adjustment" with the value -0.600. At the bottom, there is a "Remarks/Calculations" field with a text area containing "Corrected typo that recorded an incorrect quantity being recorded." and two buttons: "Save" and "Cancel".

Project Number	Category Number	Line Item Number	Item Code	Description	Location	Placed Quantity	Loc Seq Nbr
67004-3213-14	0100	0010	105-01	CONSTRUCTION STAKES, LINES AND GRADES	Main Road	1.000	1

Correct Quantity: 0.400 Incorrect Qty Previously Paid: 1.000 Adjustment: -0.600

Remarks/Calculations:
(500 Max Length)

Corrected typo that recorded an incorrect quantity being recorded.

Save Cancel

Figure 7. Quantity Adjustments Window

6. In the **Correct Quantity** field, type **0.400**.
7. On the keyboard, press the **Tab** key. The **Quantity Correction** plug-in shows the calculated adjustment in the **Adjustment** field.
8. In the **Remarks/Calculations** field, type **Corrected typo that resulted in an incorrect quantity being recorded**.

9. **Save.** The system displays a message to inform you that once saved, the correction is not editable.

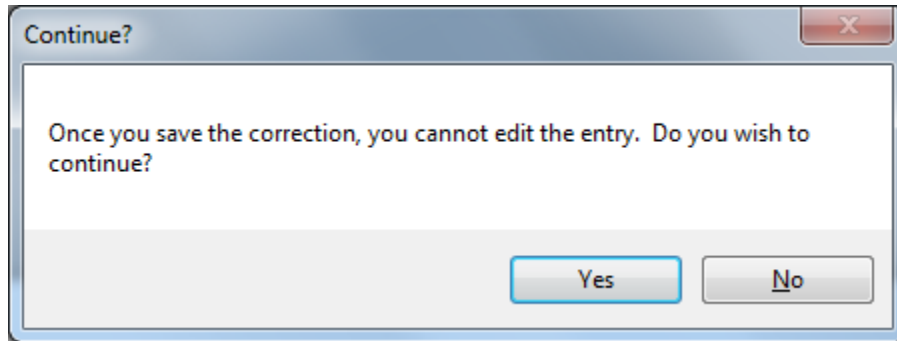


Figure 8. Continue? Window

10. In the message, click **Yes**.
11. The system displays a message to inform you that a quantity has been adjusted for that line item number.

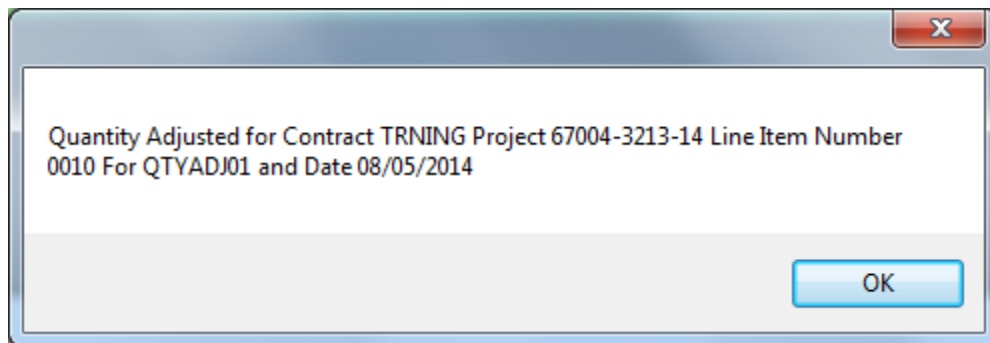


Figure 9. Untitled Message Window

12. In the message, click **OK**.
13. On the toolbar, click **Exit Application**.

Prepare for the next exercise.

14. To close the Contracts window, click **Close**. The system displays the Contract Records window.
15. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've viewed how to adjust an incorrect quantity on an approved DWR in the Quantity Correction plug-in.

Viewing DWRs Created by the 'Quantity Correction' Plug-in

The 'Qty Correction' plug-in attachment opens the Quantity Adjustments window and creates QTYADJ DWRs to adjust paid quantities on progress estimates that have already reached final approval. These may be viewed in the DWR window.

The auto created QTY ADJ DWRs are not authorized and will need to be authorized in the Diary window to be included in the next progress estimate.

The screenshot shows the 'Daily Work Reports' window with the following data:

- Contract ID:** TRN356f
- Inspector:** Quantity Adjustment ID 1
- Date:** 09/10/14
- Project Nbr:** 67004-3213-14
- Line Itm Nbr:** 0010
- Prpsl Line Nbr:** 0010
- Item Code:** 105-01
- Category Nbr:** 0100
- Item Desc:** CONSTRUCTION STAKES, LINES AND GRADES
- Unit Price:** \$150,000.00000
- Supp Desc 1:**
- Supp Desc 2:**
- Qty Reported to Date:** 0.400
- Qty Authorized to Date:** 1.000
- Units Type:** LS
- Qty Installed to Date:** 1.000
- Bid Qty:** 1.000
- Pay To Plan Qty:**
- Status:** Active
- Qty Paid to Date:** 1.000
- Current Contract Qty:** 1.000

Loc Seq Nbr	Location Installed	Placed Qty.	Plan Page Number	Templt Used
1	00028, Bridge #2	-600.0		<input type="checkbox"/>

Placed Qty: -600 Plan Page Nbr: 0 Contractor: Highways, Inc. ** PRIME **

As Built Qty: .000 Loc Seq Nbr: 1 Location: 00028, Bridge #2

Station Offset Distance Station Offset Distance

From: + .000 .000 To: + .000 .000

Material Inspection Detail

Material Component Cont Est Matr Qty Satisf Repr Matr Qty Reprt Matr Qty Matr Unit

Figure 10. Daily Work Reports Window



Exercise 4

In this exercise, view the DWR resulting from the Quantity Correction plug-in.

User ID **jj00001** Password **pass**
Connection **Training Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN353**

1. On the **Main Panel** panel, double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports panel.
2. Double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports window.
3. On the toolbar, click **Open**. The system displays a message prompting you to save changes.
4. In the message, click **No**. The system displays the Contract ID window.

Select a different contract.

5. In the **Contract ID** area, in the **Contract ID** column, double-click **TRN356f**.
6. In the **Inspector** area, in the **User ID** column, double-click **QTYADJ1**.
7. In the **Date** area, in the **DWR Date** column, double-click **09/10/14**. The system displays a message to inform you that the DWR will be opened in a read-only format.
8. In the message, click **OK**. The system displays the Daily Work Reports window.

View the installed work item.

9. Click the **Work Items** tab. The system displays the Work Items panel.
10. Double-click the following row:

Project Number **67004-3213-14**, Line Item Number **0010**,
Category Number **0100**, Item Code **105-01**,
Description **CONSTRUCTION STAKES, LINES AND GRADES**.
11. What is the placed quantity? _____

View the remark.

12. On the toolbar, click the **Remarks** button. The system displays the Remarks window.
13. View the remark.
14. To close the Remarks window, click the **Remarks** button again.
The system closes the Remarks window.

Prepare for the next exercise.

15. **Close.** The system closes the Daily Work Reports window and displays the Daily Work Reports panel.
16. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've viewed the DWR resulting from the Qty Correction plug-in.

Summary

To access the Contract Records panel:

1. On the **Main Panel** panel, double-click the **Contract Administration** icon.
2. Double-click the **Contract Records** icon.

To record the actual date of a checklist scheduled event:

1. On the **Contract Records** panel, double-click the **Checklist Event Dates** icon.
2. In the **Event Type** column, scroll to and select the desired event type.
3. In the **Actual Date** field, type the actual date the checklist event occurred.
4. **Save.**

To view a key date:

1. On the **Contract Records** panel, double-click the **Key Dates** icon.
2. In the **Key Date Type** column, select the desired key date.

To correct the quantity of an item on a paid estimate with the Quantity Correction plug-in:

1. On the **Contract Records** panel, double-click the **Contracts** icon. The Contracts panel opens.
2. Click the **Open** button. The Select Contract list is displayed.
3. In the **Select Contract** list box, scroll to and double-click the **Contract ID** or perform a **Find**. The Select Contract list closes and the Description folder tab is displayed.
4. Click the **Attachments** button.
5. Double-click the **Qty Correction** plug-in.
6. In the **DWR Date of Incorrect Qty** field, select the DWR Date for the DWR to be corrected. Note: this must be a DWR included on a paid estimate, and must be a DWR you created.

7. Click to select the row for the DWR with the incorrect placed quantity. The Quantity Correction plug-in displays an area to make the correction.
8. In the **Correct Quantity** field, type the correct quantity to report for this item on this day.
9. On the keyboard, press the **Tab** key to calculate and display the quantity for the adjustment (Incorrect Quantity - Correct Quantity).
10. In the **Remarks/Calculations** field, type the reason for the correction.
11. **Save.** The Quantity Correction plug-in displays a message to inform you that a quantity has been adjusted for that line item number.
12. In the message, click the **OK** button.

To view the DWR of an item modified with the Quantity Correction plug-in:

1. On the **Main Panel** panel, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
3. Select the desired contract, inspector, and date of the DWR that was corrected. The system displays the DWR.
4. Click the **Work Items** tab.
5. Scroll to and double-click the item that was corrected.

Review Exercise

In this exercise, perform contract midlife activities.

User ID **jj00001** Password **pass**
Connection **Training Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN356f**

1. Navigate to the Checklist Event Dates window for contract **TRN353f**.
2. What is the frequency for the **DBE Signed Subcontract(s) on File** event type? _____
3. When did the **DBE Signed Subcontract(s) on File** event type actually occur? _____
4. Navigate to the Key Dates window for contract **TRN356f**.
5. What is the actual date for the **Starting Notice**?

6. If an error is made on a DWR that needs to be corrected, and the estimate has been generated but not paid, what should be done?

7. What window is used to run the Quantity Correction plug-in to adjust the quantity on a DWR included in a paid estimate?

8. **Exit SiteManager.**

You've performed contract midlife activities.

Understanding Change Order Basics for Field Documentation

In this chapter, you will receive instruction about the following:

- Understanding General Change Order Concepts 2
- Viewing the Item Summary Window 8
- Tracking Change Orders 10
- Viewing the Custom Change Order 12
- Viewing the Change Order Report 15
- Summary 17
- Review Exercise 18

Understanding General Change Order Concepts

The change order process allows legal changes to be made to a contract by creating, approving, and tracking changes.

Contract change orders may include the following:

- Quantity adjustments for existing items (overrun/underruns)
- Adding new items of work to the contract (extra work)
- Time extensions on milestones or revisions to contract time or contract completion date
- Additions to the contract not affecting time or item quantities

Except for zero-dollar change orders, users can specify more than one function to make up a change order. Before saving a change order, perform edits to ensure that its components are reconciled with its selected functions. The system displays messages to inform the users if information has not been entered for a selected function.

Select a contract to create a new change order.

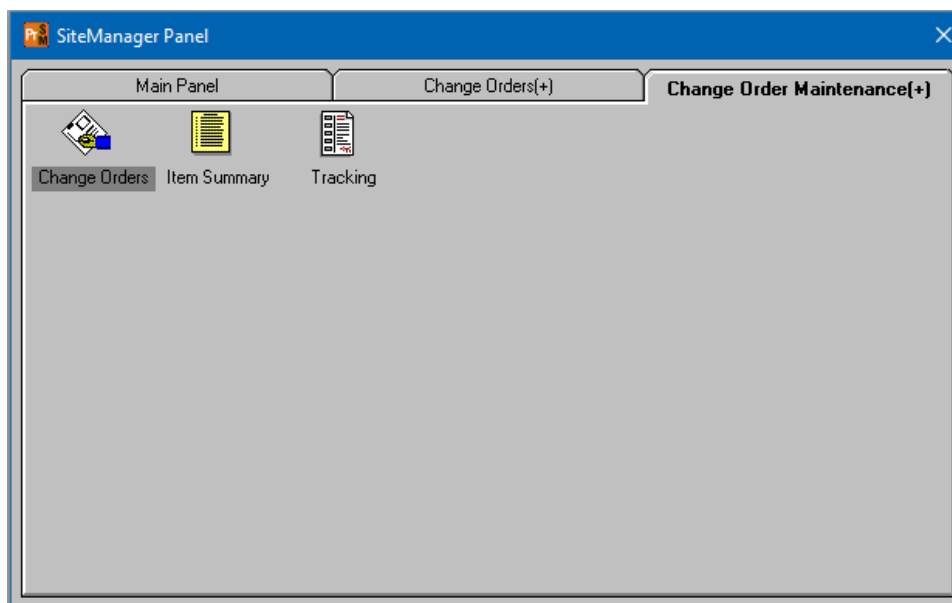


Figure 1. SiteManager Panel Window - Change Order Maintenance Panel



Exercise 1

In this exercise, navigate to the Change Order Maintenance panel.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**

1. On the **Main Panel** panel, double-click the **Change Orders** icon. The system displays the Change Orders panel.
2. Double-click the **Change Order Maintenance** icon. The system displays the Change Order Maintenance panel.

You've navigated to the Change Order Maintenance panel.

Change Order Life Cycle

SiteManager software's change order functions reflect the life cycle of contract change orders.

Creating a New Change Order

Only users with specific authority may create new change orders. Each change order must be associated with an existing active contract. Record specific information using the following Change Order window's panels:

- Header
- Items
- Time Adjustments
- Explanations

Calculating Change Orders

After the full change order creation or maintenance activities are complete, including entries or updates to the change order items, time adjustments and explanations as desired, users may calculate the view-only CO Amount field value on the Header panel.

Maintaining Change Orders

Once a change order has been created, updates to the change order information may be required. Modify change order header information, items, time frames, and explanations in update mode on the appropriate panels.

SITEMANAGER CALCULATES THE TOTAL AMOUNT OF THE CO AND DISPLAYS THE AMOUNT IN THE CO AMOUNT FIELD.

CO AMT COULD BE NEGATIVE FOR TOTAL CHANGE ORDER.

A CHANGE ORDER CAN BE KEPT IN DRAFT AND SENT FOR REVIEW ONLY OR CHANGED TO PENDING AND SENT FOR APPROVAL WITHOUT A REVIEW.

Reviewing and Approving of Change Orders

After it is created, a draft change order can be forwarded via In-Box notification for parallel review. Parallel review is concurrent review by more than one reviewer at a time.

The writer of the change order can also place the change order into Pending status and submit it for a hierarchical approval, skipping the review process.

Users involved in reviewing a draft change order or approving a pending change order can record their decisions about proposed changes to the contract using the Review/Approve window. Reviewers/approvers receive an In-Box message from the author requesting an action, review or approval for the change order. The In-Box message specifies the contract and change order number.

When a change order that is in Pending status (in the approval process) is given the recommendation “Denied” in the Change Order Review/Approve window, it remains in Pending status. The change order creator may choose to change the status to Draft to make modifications, then change it back to Pending to resubmit it for approval. If the change order will never be approved, it may be changed to Denied status on the Header panel. Once a change order is in Denied status, it may not be modified or submitted for review/approval.

For Headquarters Finance to enter the Physical Work Complete Date as part of the contract completion process, all change orders on a contract must be either Approved or Denied. (Change orders may not be in a Draft or Pending status for the contract completion process.)

Tracking Change Orders

At any time, the writer of the change order may view the status of a change order in the review or approval cycle by opening the Tracking window. The Tracking window for a change order is a view-only window and displays:

- The date a request for recommendation was sent to a reviewer or approver
- The reviewer or approver’s name
- The action requested - review or approve
- The date the reviewer or approver makes a recommendation
- The recommendation - Approved or Denied
- Any Remarks the reviewer or approver has made

Authorized users may also display details about current and historic Contract items on-line using the Item Summary window.

A CHANGE ORDER MUST BE APPROVED TO REPORT CHANGE ORDER ITEMS INSTALLED IN DWRS.

DENIED CHANGE ORDERS REMAIN IN PENDING STATUS AND MUST BE CHANGED TO DRAFT OR DENIED IN THE HEADER WINDOW. CHANGE ORDERS IN DENIED STATUS ARE INQUIRY ONLY.

ALL CHANGE ORDERS MUST BE APPROVED OR DENIED BEFORE CONTRACT COMPLETION CAN OCCUR.

Reporting

Once approved, change order data may be analyzed to help manage the change order process. The Change Order Reports function allows users to produce reports that gather information about trends in Contract changes.

A PAPER COPY OF THE CHANGE ORDER IS STILL REQUIRED FOR PHYSICAL SIGNATURES. SITEMANAGER REFLECTS ELECTRONIC VERSION.

WHEN AN APPROVER PHYSICALLY SIGNS THE CHANGE ORDER, THAT APPROVER SHOULD ALSO INDICATE THEIR APPROVAL OF THE CHANGE ORDER IN SITEMANAGER. THE HEADQUARTERS FINANCE OFFICE WILL INDICATE APPROVAL OF THE CHANGE ORDER ON BEHALF OF ALL APPLICABLE HEADQUARTERS APPROVERS.

Understanding Change Order Status

The Status field displays the status of the change order in the creation, review, and approval process. The change order status types follow:

- **Draft** - A change order is Draft status while it is being created, edited, or forwarded for *review*.
- **Pending** - A change order is changed to Pending status when it needs to be submitted for the *approval* process. While in Pending status, the change order cannot be modified except for its status.
- **Pending (with a Recommendation of Denied)** - A change order in Pending status (under review) that received a recommendation of 'Denied' may have its status changed back to Draft. With a Draft status, the change order may be edited (revised), have its status changed to Pending, and be resent through the *approval* process.
- **Approved**: A change order is automatically placed in Approved status when the last approver completes the *approval* process – it is not a manual selection. When a final approval level approves a change order, it cannot be altered. Adjustments can only be made by creating a new change order.
- **Denied** - Changing the status to Denied causes it to become inquiry-only for the life of the contract. The Denied status is not available until the Change Order has been placed in Pending status.

WHEN THE CHANGE ORDER IS APPROVED IT BECOMES READ-ONLY AND THE ITEMS BECOME AVAILABLE ON DWRS.

All change orders must be in either Approved or Denied status for the contract completion process.

IF AN APPROVER SELECTS 'DENY' IN THE REVIEW/APPROVE WINDOW, THE CREATOR SHOULD CHANGE THE STATUS BACK TO DRAFT, MAKE CORRECTIONS, AND CHANGE IT TO PENDING IN THE HEADER WINDOW TO SUBMIT IT AGAIN.

IF AN APPROVER SELECTS 'DENIED' IN THE REVIEW/APPROVE WINDOW AND PROVIDES A REMARK INDICATING THAT THE CHANGE ORDER WILL NEVER BE APPROVED AND PROVIDES A REASON, THE CREATOR SHOULD CHANGE THE STATUS OF THE CHANGE ORDER TO DENIED IN HEADER WINDOW.

BEWARE: A CHANGE ORDER IN DENIED STATUS MAY NOT BE CHANGED TO DRAFT.

Understanding Change Order Functions

The six types of change order functions include the following:

- **Overruns or Underruns** - Used when the existing contract items are either exceeded or not needed to complete the contract or work item.
- **Extra Work** - Used when additional work items are required to complete the contract.
- **Time Adjustments** - Used when the time frames need to be adjusted to reflect the completion period for a milestone or contract.
- **Zero Dollar** - Used only for contract adjustments that will not affect the dollar amount of the contract (for example, adding permits or special provision to the contract).
- **Force Account** - TDOT will not use this function. Force Account change orders will require the "Extra Work" function to be selected.
- **Final Quantity** - TDOT will not use this function.

Users define the purpose of the change order by selecting among the different functions. Except for Zero Dollar, users can specify more than one function to make up a change order.

Viewing the Item Summary Window

The Contract Change Order Item Summary window allows users to view the details of an item on a change order, regardless of the status of the change order. The Item Summary window is a display-only window with two data windows. The top pane displays the selected change order item's description as well as bid, current and pending contract item quantities and corresponding amounts. The lower pane displays a list of the change orders associated with the selected change order item, including the quantity, dollar amount and the status of each change order.

The screenshot shows a window titled "Item Summary" with the following fields and data:

Contract ID: TRN350 Proj Nbr: 67004-3213-14 Line Item Nbr: 0940
Item Code: 607-37.02 Unit: L.F. Unit Price: 30.00000
Item Description: 18" CORRUGATED METAL PIPE CULVE
Supp Desc1:
Supp Desc2:
Contract Bid: 206.000 \$6,180.00
Approved Change Order: 0 \$0.00
Current Contract: 206.000 \$6,180.00 % Change To Date: 0
Pending Change Order: 80.000 \$2,400.00

CO Nbr	Quantity	Unit Price	Amount	Status
001	80.000	\$30.00	\$2400.00	PEND

Figure 2. Item Summary Window



Exercise 2

In this exercise, view the Item Summary window.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**

1. On the **Change Order Maintenance** panel, double-click the **Item Summary** icon. The system displays the Change Order Items Select window.
2. In the **Contract ID** area, in the **Contract ID** column, double-click **TRN350**.
3. In the **Change Order Items** area, in the **Item Code** column, double-click **607-37.02**. The system displays the Item Summary window.
4. What is the adjustment to the item quantity for this change order? _____
5. On which change order did this occur? _____
6. Has this item been adjusted on any change orders for this contract? _____
7. To close the Item Summary window, click the **Close** button.

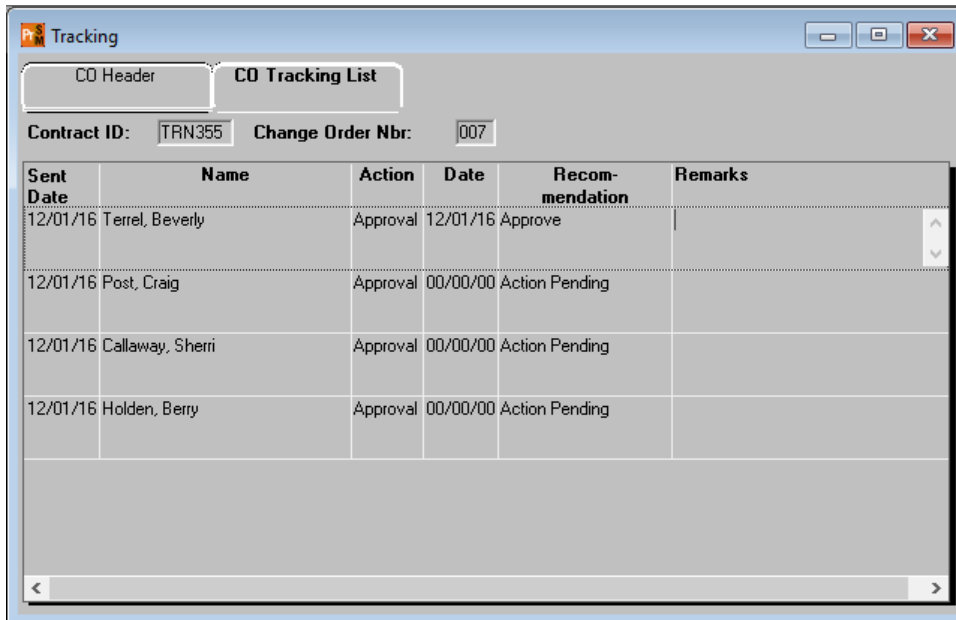
You've viewed the Item Summary window.

Tracking Change Orders

The status of a Change Order in the review or approval cycle can be monitored by opening the Tracking window at any time. The Tracking window for a change order is a view-only window and displays the following information:

- The date a request for recommendation was sent to a reviewer or approver
- The reviewer or approver's name
- The action requested - review or approve
- The date the reviewer or approver made a recommendation
- The recommendation - Approved or Denied
- Any Remarks the reviewer or approver has made

Authorized users may also view details about current and historic contract items on-line using the Item Summary window.



The screenshot shows a window titled "Tracking" with a "CD Tracking List" tab. It displays fields for "Contract ID: TRN355" and "Change Order Nbr: 007". Below is a table with columns: Sent Date, Name, Action, Date, Recommendation, and Remarks.

Sent Date	Name	Action	Date	Recommendation	Remarks
12/01/16	Terrel, Beverly	Approval	12/01/16	Approve	
12/01/16	Post, Craig	Approval	00/00/00	Action Pending	
12/01/16	Callaway, Sherri	Approval	00/00/00	Action Pending	
12/01/16	Holden, Berry	Approval	00/00/00	Action Pending	

Figure 3. Tracking Window



Exercise 3

In this exercise, view the Tracking window for another change order.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN350** (contract); **001** (change order)

1. On the **Change Order Maintenance** panel, double-click the **Tracking** icon. The system displays the Tracking window.

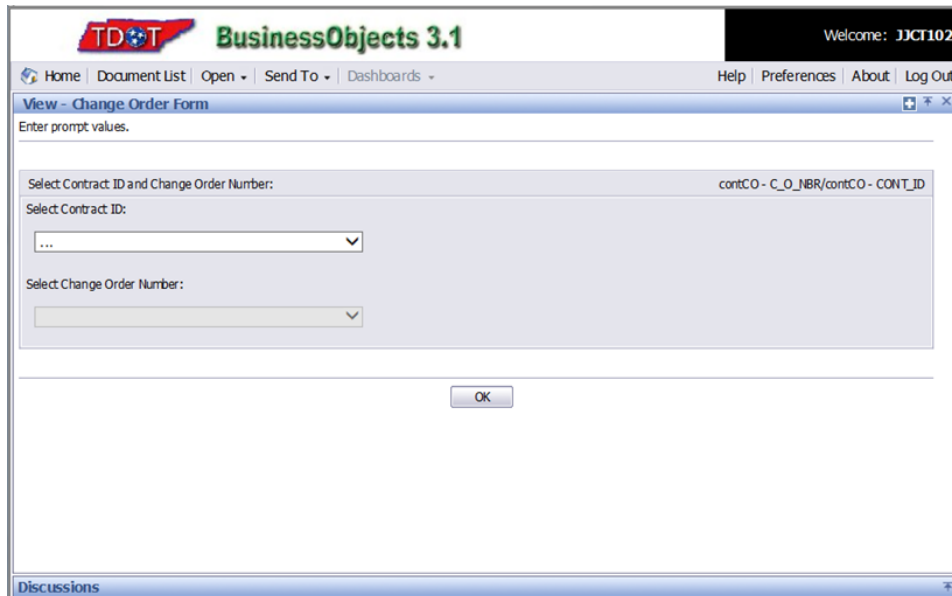
Open another change order on a different contract.

2. On the toolbar, click the **Open** button. The system displays the Change Order Tracking Select window.
3. In the **Selection** area, click the **Contract ID** button. The system displays the Contract ID area.
4. In the **Contract ID** column, double-click **TRN355**. The system displays the Change Orders area.
5. In the **CO Nbr** column, scroll to and double-click **007**. The system displays the Tracking window.
6. For general information about the change order, view the CO Header panel.
7. Click the **CO Tracking List** tab. The system displays the CO Tracking List panel.
8. Who is the next person to approve the change order? _____
9. To close the Tracking window, click the **Close** button. The system displays the Change Order Maintenance window.

You've viewed the Tracking window for a change order.

Viewing the Custom Change Order

The BOE report, *Supplemental Agreement and/or Request for Construction Change*, is a custom TDOT document to gather physical signatures from department officials. It's important that the report is reviewed for accuracy.



The screenshot displays the BusinessObjects 3.1 interface. At the top, the TDOT logo and 'BusinessObjects 3.1' are visible. A user profile bar shows 'Welcome: JCT102'. The main menu includes 'Home', 'Document List', 'Open', 'Send To', and 'Dashboards'. On the right, there are links for 'Help', 'Preferences', 'About', and 'Log Out'. The central window is titled 'View - Change Order Form' and contains the following elements:

- A prompt: 'Enter prompt values.'
- A header for the selection area: 'Select Contract ID and Change Order Number: contCO - C_O_NBR/contCO - CONT_ID'
- A label: 'Select Contract ID:'
- A dropdown menu for 'Select Contract ID' showing '...'
- A label: 'Select Change Order Number:'
- A dropdown menu for 'Select Change Order Number'.
- An 'OK' button at the bottom center.

At the bottom of the window, there is a 'Discussions' tab.

Figure 4. Change Order – Parameters

**Supplemental Agreement and/or Request for Construction Change
Change Order No. 001**

Category 3

STATE OF TENNESSEE
Department of Transportation
Bureau of Operations
Nashville, TN 37243-0326

Contract No.: CNP160
Project No.: 44011-3200-94, 44011-4200-04, 71008-3203-94, 71008-4203-04,
71031-3212-94, 71031-4212-04
Reference No.: HSIP-96(40), N/A, HSIP-291(10), N/A, HSIP-96(40), N/A
County(s): JACKSON, PUTNAM

Whereas, we **ROGERS GROUP, INC.** with **TRAVELERS CASUALTY & SURETY COMPANY OF AMERICA**, as Surety, entered into a contract with the STATE OF TENNESSEE, Department of Transportation, Bureau of Operations, on **06/19/2015**, for the construction by said Contractor of the above designated contract; and Whereas, certain items of construction encountered, are not covered by the original contract, we desire to submit the following additional items of construction to be performed by the Contractor and paid by the State at the prices scheduled therefore below:

The purpose of this Change Order is to establish unit prices for items of work not covered by the original contract.

The purpose of this Change Order is to extend contract time.

This change order is necessary to add Items 705-02.02, Single Guardrail (Type 2); Item 706-06.03, Radius Rail; Item 712-02.01, Additional Traffic Control and Item 713-02.14, Flexible Delineator (Bi-Directional, White), and extend the contract 24 days to a new completion of November 15, 2015.

Items 705-02.02, Single Guardrail (Type 2); Item 706-06.03, Radius Rail; Item 712-02.01, Additional Traffic Control and Item 713-02.14, Flexible Delineator (Bi-Directional, White), are necessary items for safety improvements which will be added to the ongoing resurfacing contract. A Road Safety Audit Review held on September 30, 2015, determined the need of additional safety improvements on S.R. 96 from S.R. 24 (US-70) to S.R.53 in Granville. The existing guardrail throughout the current project in Jackson County is well below the acceptable height standards and will be upgraded to the new 31 inch height safety standards. Several guardrail locations measured below 20 inches making it difficult to attach new type 38 end terminals with the existing guardrail and adjustments necessary are inadequate to meet the minimum height restrictions. Due to the rural location and numerous curves, flexible delineators (bi-directional, white) are being added to this contract per the Road Safety Audit Review to accent the changes in the horizontal alignment. The Average Unit Prices for all items have been verified and are in compliance within the 3 year historic cost. Therefore, it is recommended that Item 705-02.02, Single Guardrail (Type 2); Item 706-06.03, Radius Rail; Item 712-02.01, Additional Traffic Control and Item 713-02.14, Flexible Delineator (Bi-Directional, White) be added to the contract.

As a result of the increased safety improvements, it is necessary to extend the contract 24 days. The new completion date will be November 15, 2015.

Project Documents supporting this time extension are available upon request.

This Change Order includes a Time Extension.

Unit prices listed below include all labor, materials, profit, overhead and incidentals necessary to complete this work.

Item Code	Description	Unit	Current/Pending Quantities	Revised Quantities	Qty Over + Qty Under -	Contract Price	Net Amount Due Change
705-02.02	SINGLE GUARDRAIL (TYPE 2) Single Guardrail (Type 2)	Linear Feet	0.000	2,417.000	2,417.000	17.65	43,143.45

Figure 5. Supplemental Agreement and/or Request for Construction Change Report (initial page)

**Supplemental Agreement and/or Request for Construction Change
Change Order No. 001**

Category 3

STATE OF TENNESSEE
Department of Transportation
Bureau of Operations
Nashville, TN 37243-0326

Contract No.: CNP160
Project No.: 44011-3200-94, 44011-4200-04, 71008-3203-94, 71008-4203-04,
71031-3212-94, 71031-4212-04
Reference No.: HSIP-96(40), N/A, HSIP-291(10), N/A, HSIP-96(40), N/A
County(s): JACKSON, PUTNAM

706-06.03	RADIUS RAIL Radius Rail	Linear Feet	0.000	12.500	12.500	24.68	308.50
712-01.01	ADDITIONAL TRAFFIC CONTROL Additional Traffic Control	Lump Sum	0.000	1.000	1.000	7,500.00	7,500.00
713-02.14	FLEXIBLE DELINEATOR (WHITE)	Each	0.000	300.000	300.000	36.75	11,025.00

Bid Contract Amount: \$1,080,778.41

Current Change Order : \$61,976.95
Approved Change Orders: \$0.00
Pending Change Orders: \$0.00
Total Change Orders to Date: \$61,976.95

Now, Therefore, We, ROGERS GROUP, INC., Contractors, and TRAVELERS CASUALTY & SURETY COMPANY OF AMERICA, Surety, hereby agree to the Supplemental Agreement consisting of the above mentioned items and prices, and agree that this Supplemental Agreement is hereby made a part of the original contract and will be performed by this Contractor in accordance with specifications thereof, and that the original contract remain in full force and effect, except insofar as specifically modified by this Supplemental Agreement.

RECOMMENDED FOR APPROVAL:

_____	DATE	_____	DATE
DISTRICT SUPERVISOR		FHWA/CERTIFICATION ACCEPTANCE	
		_____	CONTRACTOR
		By _____	DATE
APPROVED BY:			
_____	DATE	_____	SURETY
DISTRICT OPERATIONS ENGINEER		By _____	DATE

Figure 6. Supplemental Agreement and/or Request for Construction Change Report (final page)

Viewing the Change Order Report

The reviewer and/or approver of a change order uses the Change Order Report window as a source of information. This report window displays all the data included on a change order. A second page displays only if there are Time Extensions associated with the change order selected for this report.

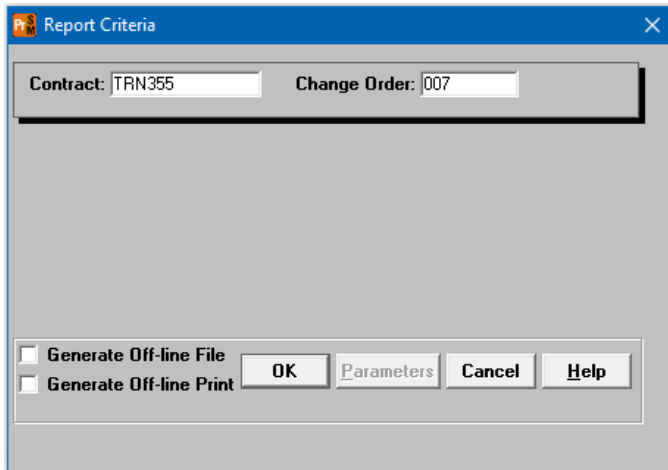


Figure 7. Report Criteria

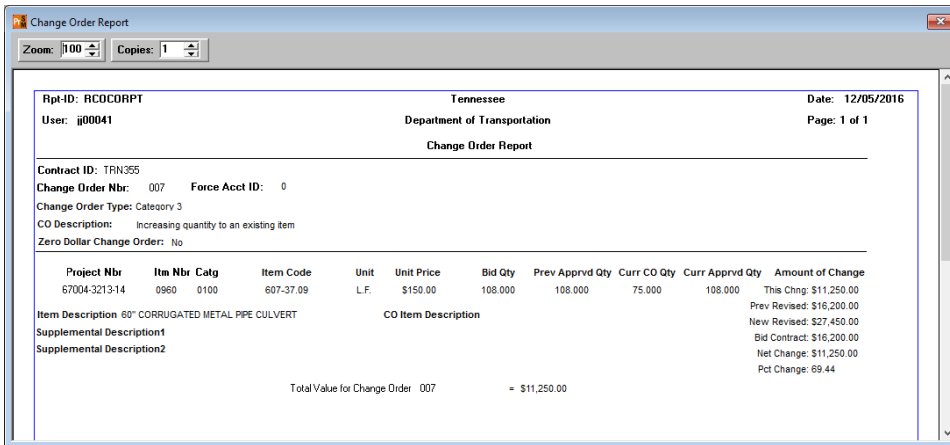


Figure 8. Change Order Report

THE STANDARD CHANGE ORDER REPORT IS AVAILABLE IN STANDALONE MODE.



Exercise 4

In this exercise, access and view the Change Order report.

User ID **jj00041** Password **pass**
Connection **Server**
Group Name **FIELD - Operations Inspector [INSP]**
Prior Keys **TRN355 (contract); 007 (change order)**

1. On the SiteManager Panel window, click the **Change Orders** tab. The system displays the Change Orders panel.
2. Double-click the **Reports** icon. The system displays the Reports panel.
3. Double-click the **Change Order Report** icon. The system displays the Report Criteria window with the current keys selected.
4. To generate the report, click **OK**.
5. What is the description for this change order?

6. What is the total value of this change order? _____
7. To close the Change Order Report window, click **Close**. The system displays the SiteManager Panel window.

Prepare for the next exercise.

8. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've accessed and viewed the Change Order report.

Summary

Contract change orders may include:

- Quantity adjustments for existing items
- Adding new items of work to the contract
- Extra work
- Time extension on milestones or revisions to a contract completion date

To access the Change Orders panel:

1. On the **Main Panel** panel, double-click the **Change Orders** icon. The system displays the Change Orders panel.

To view the Item Summary window:

1. On the **Change Orders** panel, double-click the **Change Order Maintenance** icon. The system displays the Change Order Maintenance panel.
2. Double-click the **Item Summary** icon. The system displays the Change Order Items Select window.
3. Select the desired contract and change order.
4. Open the desired record.

To track the status of a change order:

1. On the **Change Orders** panel, double-click the **Change Order Maintenance** icon. The system displays the Change Order Maintenance panel.
2. Double-click the **Tracking** icon. The system displays the Change Order Tracking Select window.
3. Select the desired contract and change order.

To view the Change Order report:

1. On the **Change Orders** panel, double-click the **Reports** icon. The system displays the Reports panel.
2. Double-click the **Change Order Report** icon.
3. Select the desired contract and change order.
4. Click **OK** to generate the report.

Review Exercise

In this exercise, review information about a change order.

User ID	jj00041	Password	pass
Connection	Training Server		
Group Name	FIELD – Operations Inspector [INSP]		
Prior Keys	TRN355 (contract); 005 (change order)		

1. Navigate to the **Tracking** window and view the approvers for contract **TRN355**, change order **006**.
2. Who is the next approver for this Change Order?

3. Navigate to the **Change Order Report** window.
4. Generate the **Change Order Report** for contract **TRN355**, change order **006**.
5. What is the **Change Order Type** for this change order?

6. **Exit SiteManager.**

You've reviewed information about a change order

Answers

This section contains the answers to Field Staff course exercise questions.

- Getting Started 2
- Common Functionality 2
- Administering Contracts for Field Documentation 3
- Creating Daily Work Reports
for Field and Office Documentation (Part 1) 5
- Creating Daily Work Reports
for Field and Office Documentation (Part 2) 6
- Test Templates to Material Categories 6
- Processing Sample Records and Test Results
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Getting Started

Not applicable.

Common Functionality

Exercise 1

5. Update
6. None
12. Open

Exercise 2

2. Taylor Smith
3. 00/00/00
4. TRN349
5. New

Exercise 3

5. New, then Choose Keys

Administering Contracts for Field Documentation

Exercise 2

2. Region 2, Unit 723
3. Completion Date
4. \$14,657,837.81

Exercise 3

2. Overton

Exercise 5

3. 05/17/14
4. 04/30/17

Exercise 6

2. Jamie Nopps

Exercise 7

2. Highways, Inc.
3. Johnson & Company
4. Hudson Insurance Co

Exercise 8

2. 8.32%

Exercise 9

2. 4
4. Mowing Cycle 1
5. 06/01/13
6. 20 days

Exercise 10

5. SR-84; EXIST. SR-85, FROM NEAR WINDLE RD. TO SR-84
6. State Route 84

Exercise 11

2. Overton

Exercise 12

5. \$1.00000
6. .000
10. \$143.00000
11. 240.00

Exercise 14

4. Three
5. Two
7. 07/10/14
8. No, because the Parent Subcont Nbr field is blank

Exercise 15

2. 1
3. Quantity: 13,111.000 Amount: \$89,154.80

Review Exercise

3. Region 2, Unit 723
4. Grade & Drain
5. 05/16/14
6. Johnson & Company
8. No
10. One
13. 1,885.00
14. No
16. Four
19. Southern State Survey
20. No
21. No

Creating Daily Work Reports for Field and Office Documentation (Part 1)

Exercise 8

4. DWR template required
8. DWR template
15. 40.00

Exercise 10

10. Yes – Highways, Inc.
12. Three types, three pieces
14. One

Creating Daily Work Reports for Field and Office Documentation (Part 2)

Exercise 5

27. 29.0

30. 29.0

Review Exercise

10. 40.0

Test Templates to Material Categories

Not applicable.

Processing Sample Records and Test Results for Operations Inspectors

Exercise 5

7. Yes or No. Depends on the other sample IDs created by the user.

Exercise 6

9. 4.5%

Exercise 13

- 7. So far, yes. In-spec is okay.
- 12. So far, yes. No-spec is okay.
- 17. No. Out-of-spec test results disqualify the sample from auto-finalizing.
- 25. Out-of-spec
- 29. No-spec
- 33. In-Spec

Review Exercise for Asphalt at the Plant

- 4. In-spec

Exercise 18

- 61. Yes or No. Depends on the other sample IDs created by the user.

Creating and Viewing Diaries for Field and Office Documentation

Exercise 6

- 3. 57 degrees and partially cloudy

Exercise 7

- 3. 13.0

Exercise 8

- 3. Concrete Grinder (1), Pickup Truck (2), Crane (1)
- 5. Class "A" Operators, Foreman, Unskilled Laborer, Truck Driver (2 axles)

Understanding Estimate Basics and Progress Estimates for Field Documentation

Exercise 2

4. \$1,412,011.08
5. Yes, Item and Other

Exercise 3

4. Change order to increase quantity is Pending.
8. Not enough samples were taken and completed for the amount installed.

Exercise 4

6. 70.100
7. 70.100
9. 5,500.000
10. 5,500.000
12. 929.000
13. 929.000

Exercise 5

4. No
7. Yes, for -20,000.00

Exercise 6

1. \$1,433,841.78
2. Yes
3. \$-25,218.44
4. No
5. 1400
6. -400
7. -20,000.00

Review Exercise

2. \$1,437,229.52
3. Yes, Item and Other
5. Overrun, Checklist Event and Deficient Tested Material
8. 1,400.00
9. Send copy of estimate to the contractor.

Performing Contract Midlife Activities for Field Documentation

Exercise 2

3. Yes, on 5/21/14
4. Time starts on that day

Exercise 4

11. -.600

Review Exercise

2. One Time Only
3. 08/15/14
5. 05/21/14
6. See “TDOT Progress Estimate Correction Workflow”
7. Contracts window > Attachments > Qty Correction plug-in

Understanding Change Order Basics for Field Documentation

Exercise 2

4. 80.00
5. 001
6. No. The Approved Change Order field has a Quantity of 0.

Exercise 3

8. Post, Craig

Exercise 4

5. Increasing quantity to an existing item
6. \$11,250.00

Review Exercise

2. Post, Craig
5. Category 3