AASHTOWare Project SiteManager™ Training Guide for Office 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:

Understanding the General Workflow

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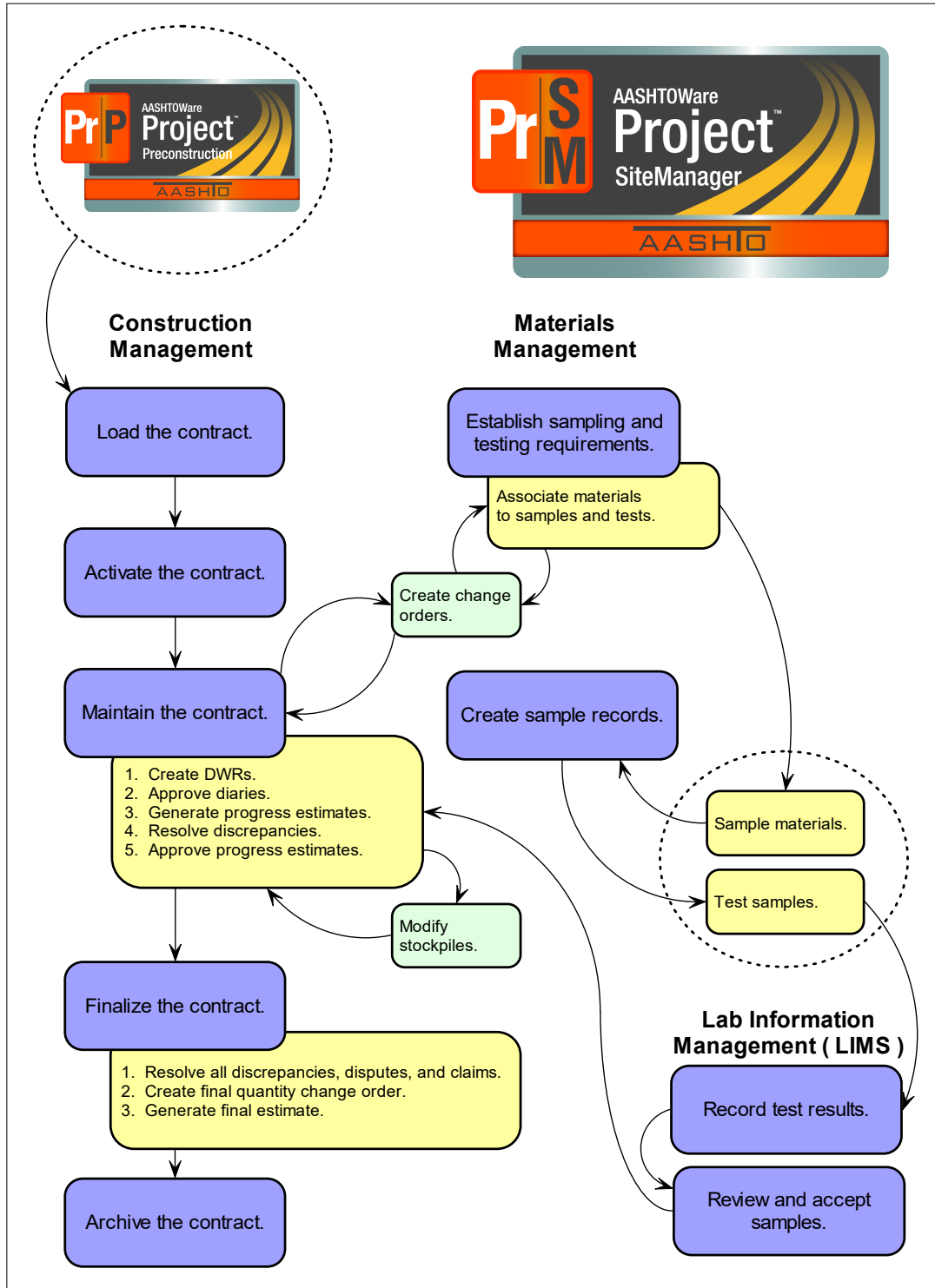

Figure 1. General Workflow

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

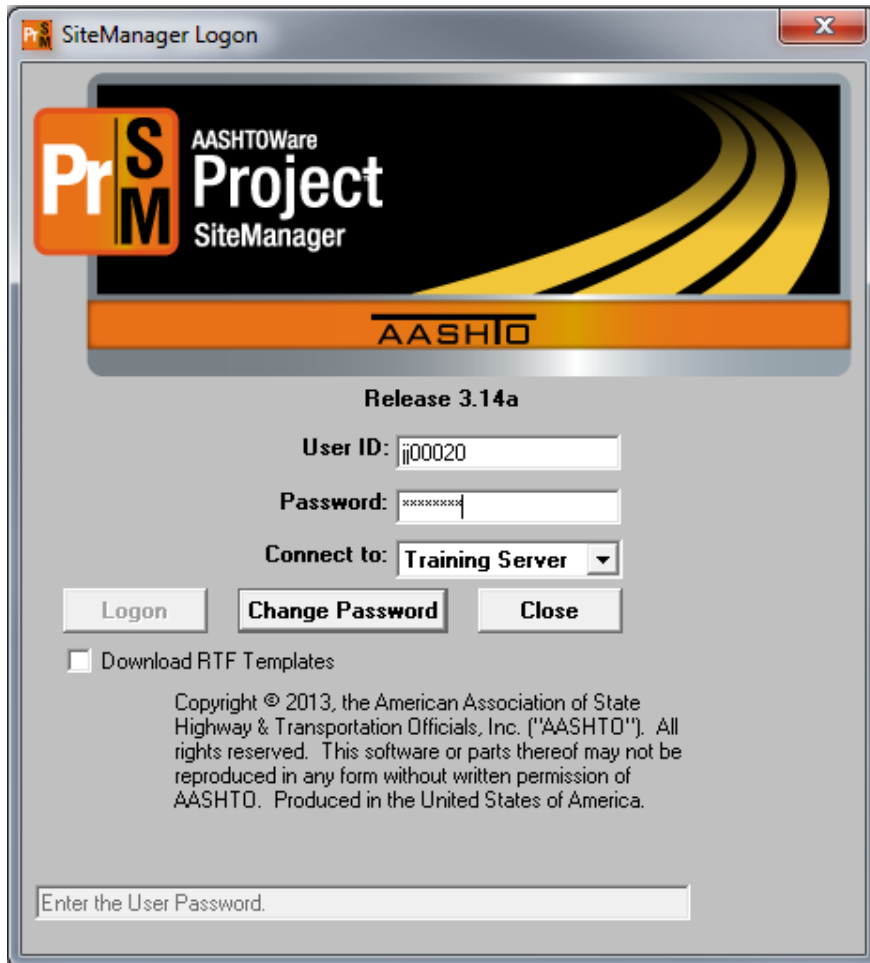In addition to a user ID, SiteManager also has password protection.

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.
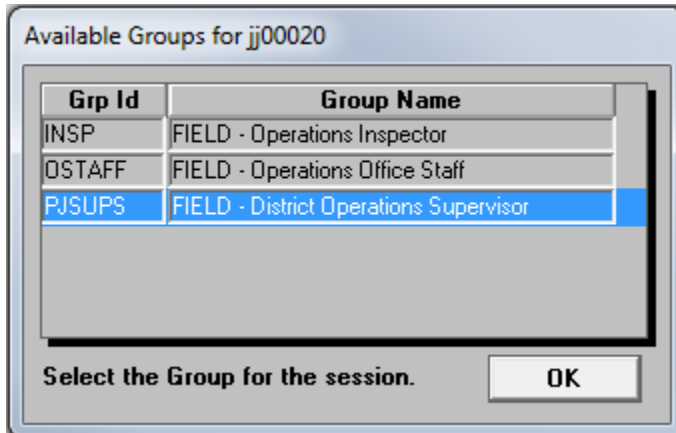

Figure 6. Available Groups For < > Window

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

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. <u>SITEMANAGER PASSWORDS FOR TDOT CRITERIA</u>:

   - 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.

Figure 8. SiteManager Panel Window - Main Panel
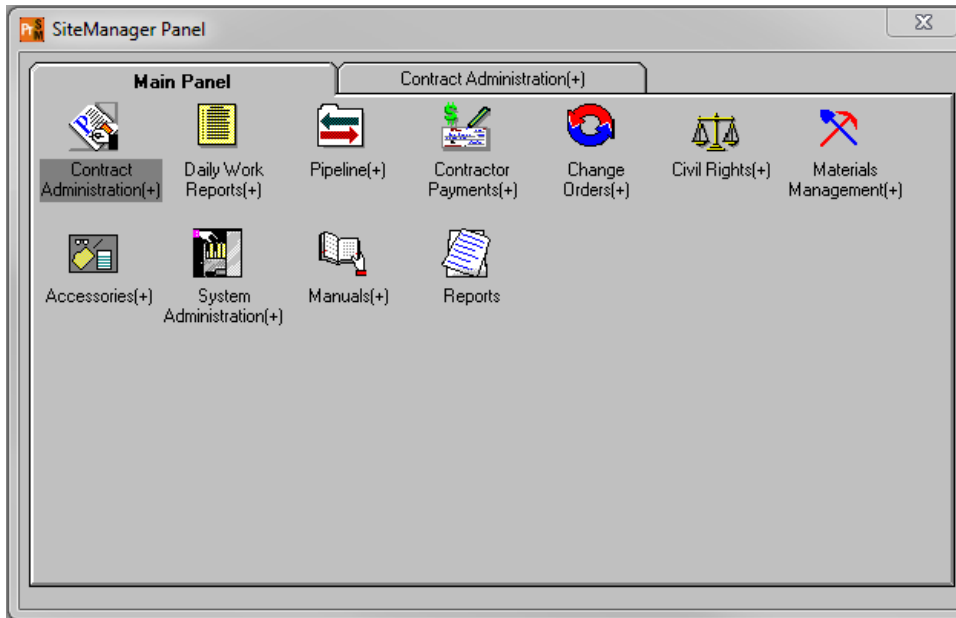
NOTE

AVAILABLE ICONS ARE SPECIFIC TO THE SECURITY GROUP.

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.
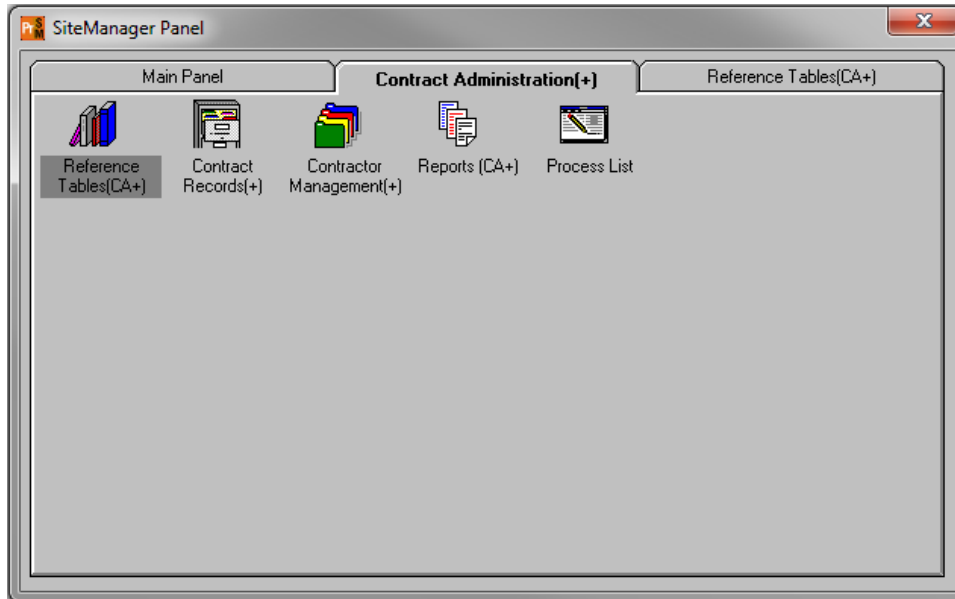

Figure 9. Navigating in SiteManager

Note: 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.

   > NOTE
   >
   > EXPLAIN UP AND DOWN CONCEPT, POSSIBLY AS TIERS.

3. To go up two levels, click the **Main Panel** tab.

4. Double-click the **Daily Work Reports** icon. View the icons available.

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

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.

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.

| Ready | Server | PROD | PJSUPS | ijvp523 |

Figure 11. SiteManager Status Bar

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.

File	Edit	Services	Window	He
Open				Ctrl+O
Close				Ctrl+F4
New				Ctrl+N
Delete				Ctrl+D
Save				Ctrl+S
Refresh				Ctrl+F
Print Setup				Ctrl+U
Print Preview				Ctrl+W
Print				Ctrl+P
Main Panel				Ctrl+M
Exit				Alt+F4

Services	Window	Help
Remarks		Ctrl+Alt+R
Address		Ctrl+Alt+A
Generic Fields		Ctrl+Alt+G
Attachments		
Process Status		
Custom Record		Ctrl+Shift+U

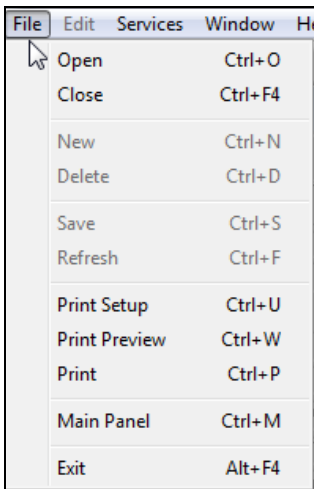| Help	
Contents	F1
Search for Help on...	Ctrl+Y
Glossary	Ctrl+G
Current Window	Ctrl+F1
About SiteManager	Ctrl+Shift+A
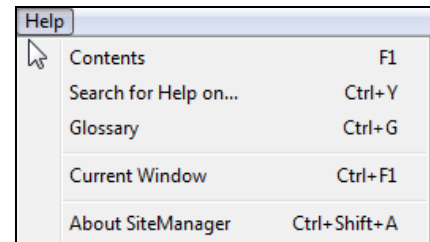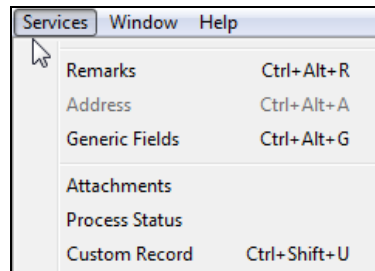
Figure 12. SiteManager Menus - File, Services and Help

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.

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

8. On the SiteManager Online Help window, click **Close**.

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.
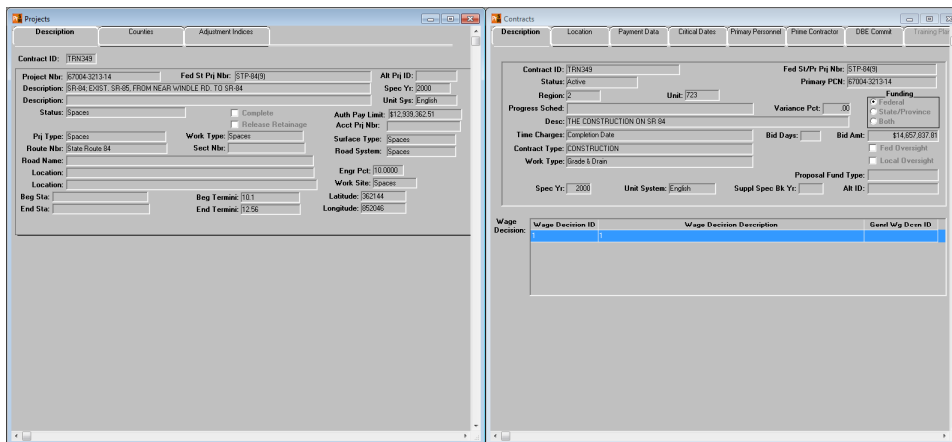
Figure 13. Two Windows Tiled

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

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? _____

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.
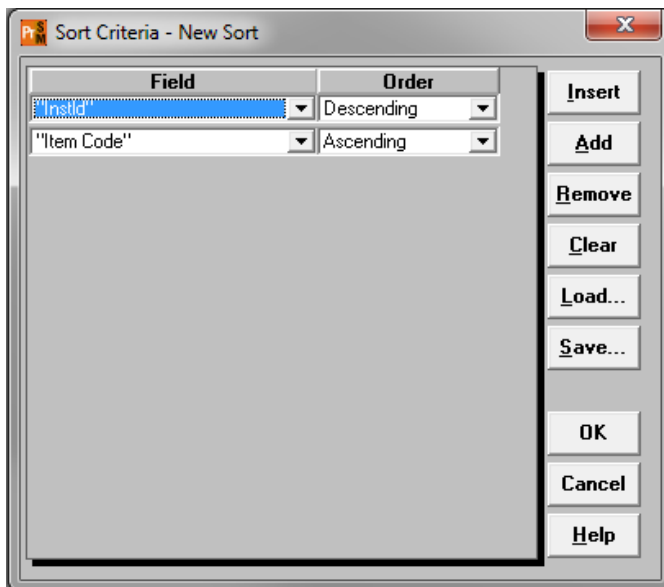
Figure 1. 'Sort Criteria – New Sort' Window

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
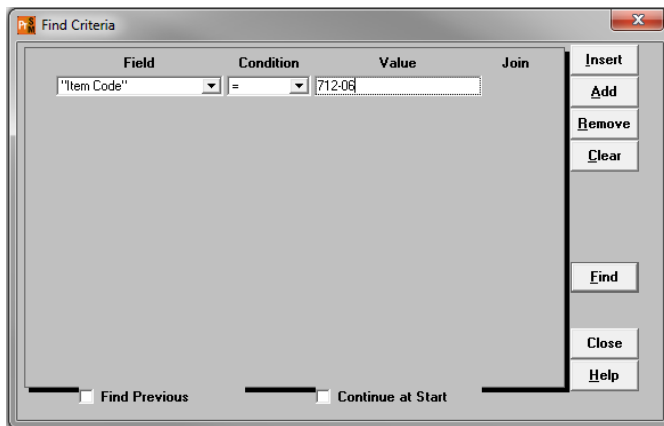
Figure 2. 'Find Criteria' Window

   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

Figure 3. 'Filter Criteria – New Filter' Window
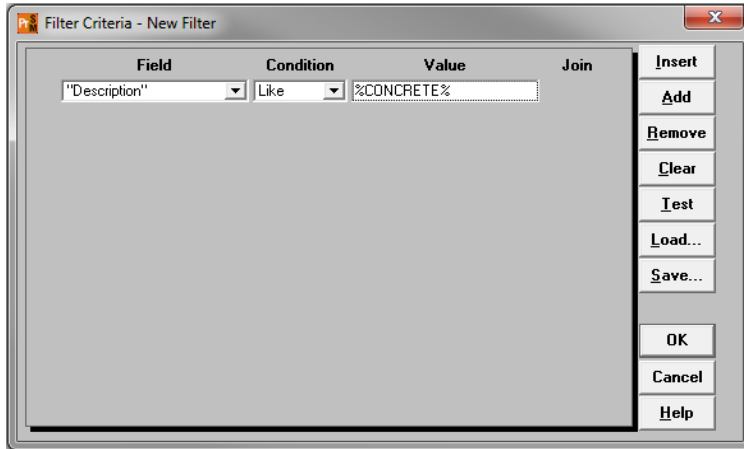
WARNING! CLICK CLEAR ONLY TO REMOVE ALL ROWS ON A FILTER AND RETURN TO AN UNFILTERED LIST. CLICK REMOVE TO DELETE A SINGLE ROW.

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%**.

> % CHARACTERS ARE VARIABLES.

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.

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.

KNOWN ISSUE

IGNORE.
ALWAYS CLICK YES.

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.

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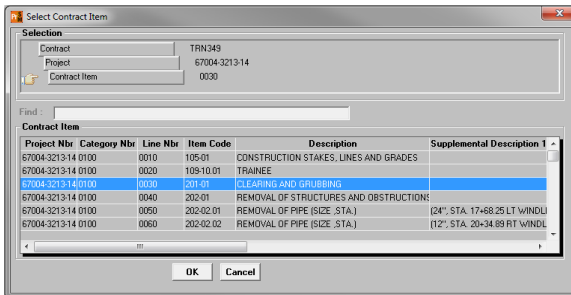
Figure 5. Select < > Window (with Quick Sort)

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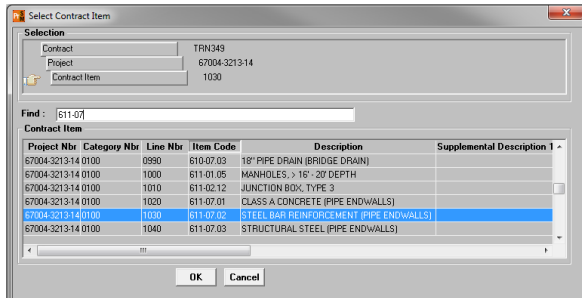
Figure 6. Select < > Window (with Quick Find)

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.

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.

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.
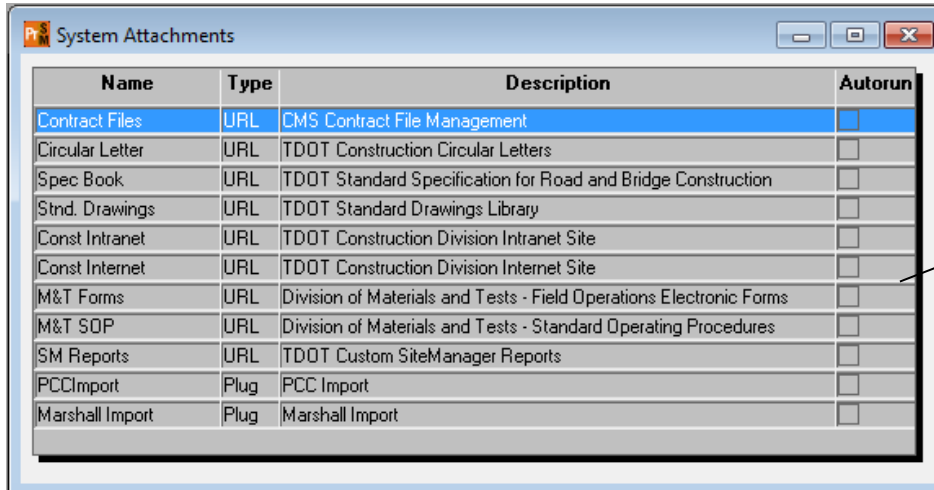
Prepare for the next exercise.

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.

Figure 8. System Attachments Window

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

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.

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/

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/#.
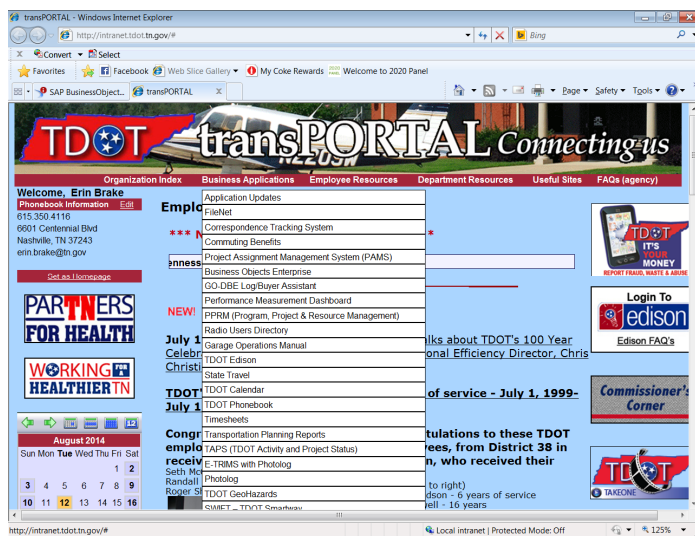
Figure 10. transPORTAL Intranet Site – Home Page

Common Functionality

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

   Note: This is also known as production BOE.

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.
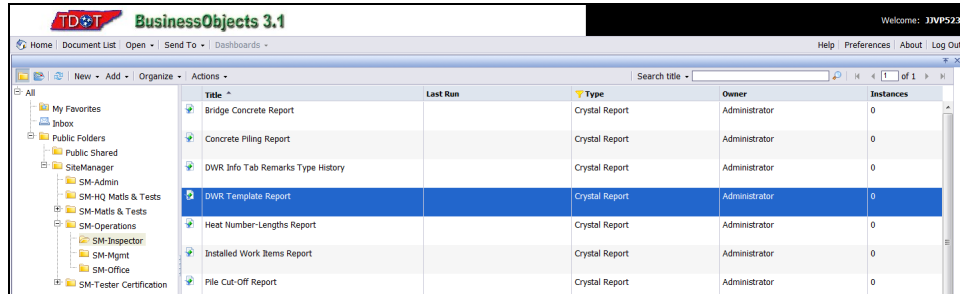
Figure 11. BusinessObjects Intranet Page (Production)

5. Click the **Document List** button.
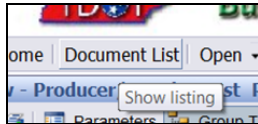
Figure 12. Document List Button (detail)

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 **SM Operations** folder.

9. Double-click the **SM-Inspector** folder.

10. Double-click **DWR Template Report**. The system may display a message to inform that the document is being processed.

11. 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).
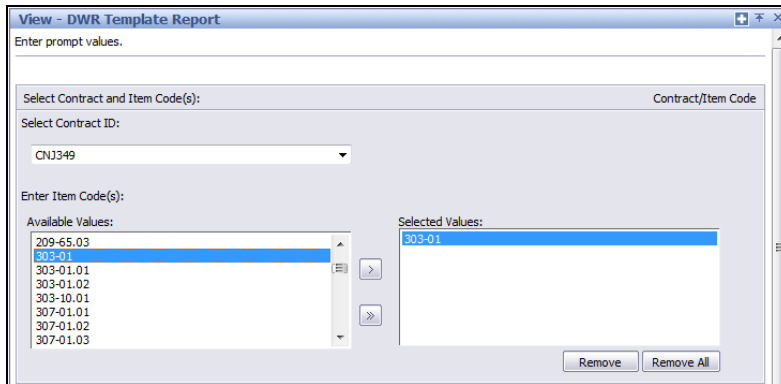
Figure 13. DWR Template Report - Prompts Page (Part 1 of 2)

- ▪ **Select Contract ID:**
  Select the desired contract.

- ▪ **Enter Item Code(s):**
  Select the desired items.
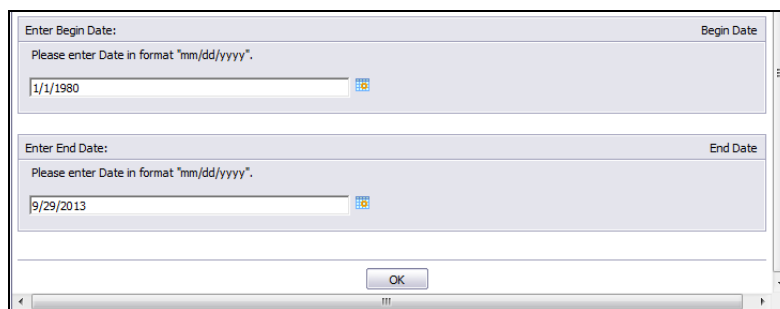
Figure 14. DWR Template Report - Prompts Page (Part 2 of 2)

- ▪ **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.
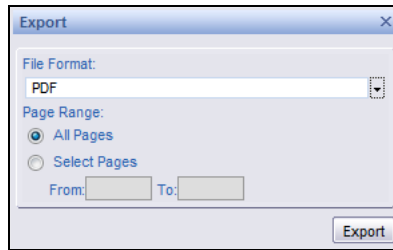
Figure 15. BusinessObjects - Export Window

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.

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.

Activating Contracts for Office Documentation

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

Understanding New Contracts

New contracts are typically loaded electronically from the Preconstruction system into SiteManager with a pending status.
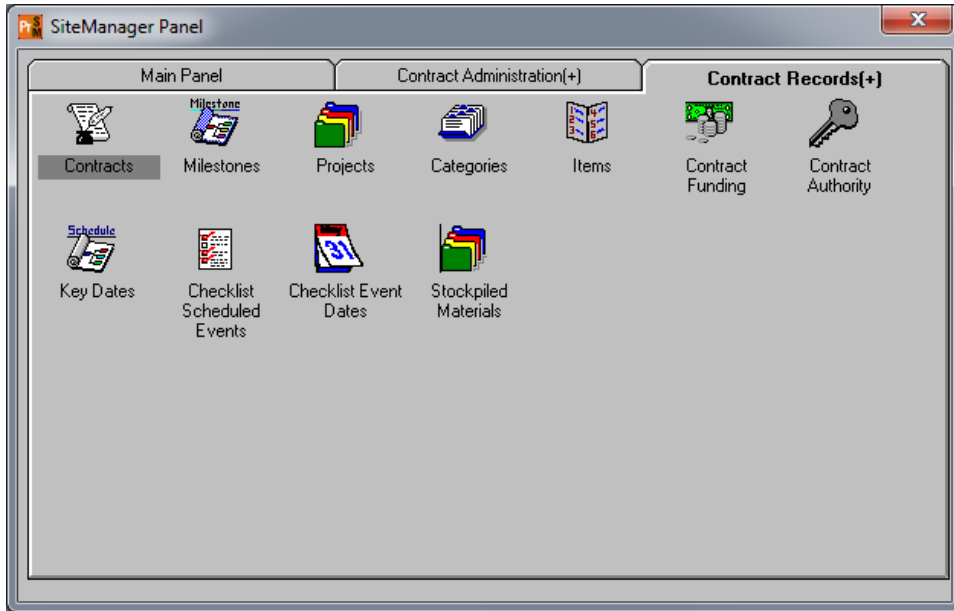
Figure 1. Contract Records Panel

To begin tracking the progress of contract work in SiteManager, the Headquarters Finance Office will change the contract's status to Active. This will trigger an automatic email notification to the District Supervisor, Office Staff and Regional Materials & Tests. Upon receipt of the notification, Office Staff will begin the contract activation and initialization process and Regional Materials will begin setting up contract materials.

Exercise 1

In this exercise, navigate to the Contracts window.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		

1. Start and log onto SiteManager as user **jj00002** *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 **TRN350**.

You've accessed the Contracts window.

Viewing Contracts

The Contracts window's Description panel displays the basic Contract 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.

MOWING CONTRACTS WILL BE SET UP AS COMPLETION DATE BUT WILL USE MILESTONES CHARGED BY WORKING DAY.

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 FIELD SHOWS THAT THE ITEMS ARE FROM THE 2000 ITEM MASTER. (2001 ITEM MASTER IS METRIC).
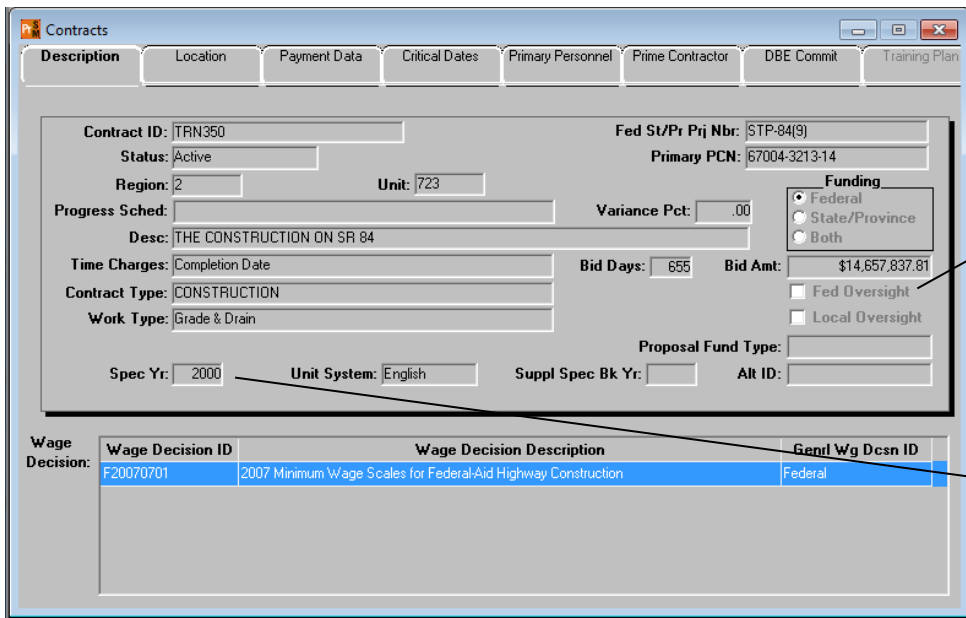
Figure 2. Contracts Window - Description Panel
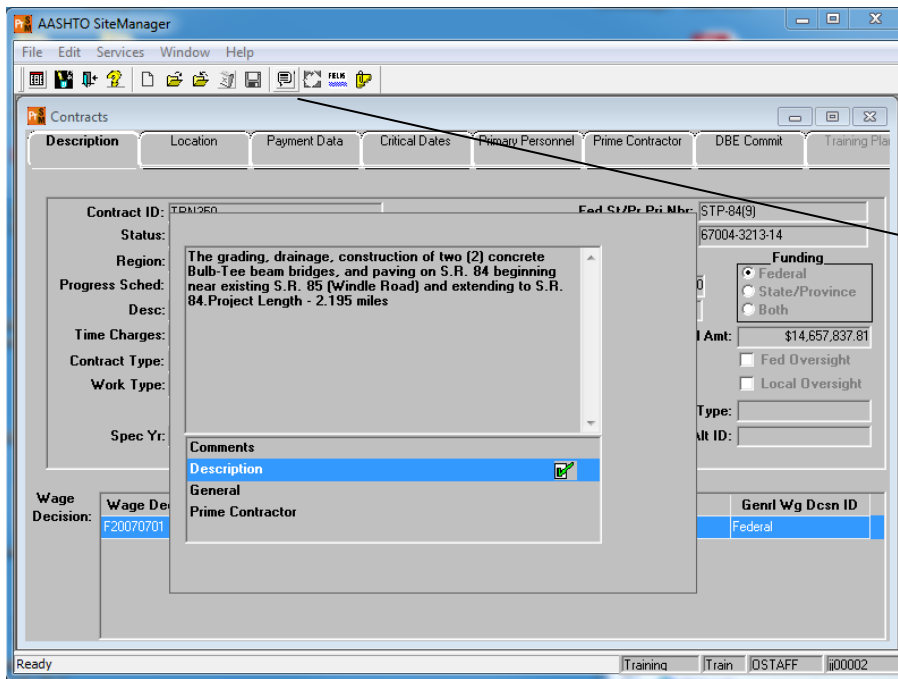
Figure 3. Contracts Window - Remarks Window - Detail

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

 Exercise 2

In this exercise, view the description of a contract.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. View the information on the **Description** panel.

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 viewed information about a contract.

Viewing the Contract Location

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

Figure 4. Contracts Window - Location Panel

 Exercise 3

In this exercise, view the location of a contract.
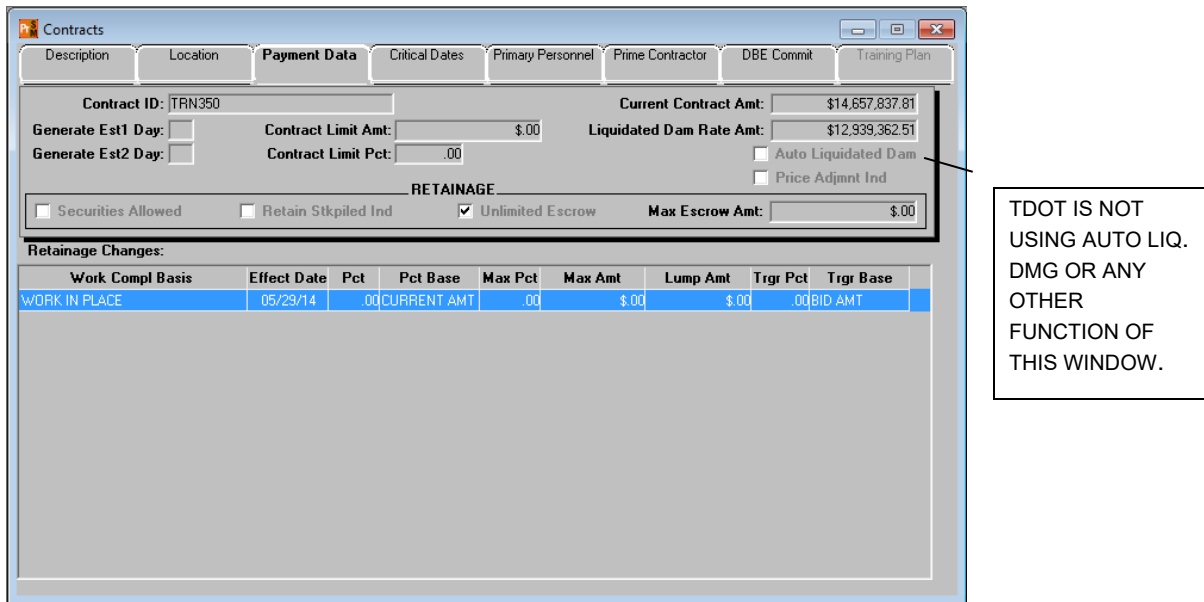
User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Click the **Location** tab. The system displays the Location panel.

2. What is the primary county? _____

You've viewed location information for a contract.

Viewing Contract Payment Data

The Payment Data panel displays common construction computations automatically calculated by the system.

Figure 5. Contracts Window - Payment Data Panel

Exercise 4

In this exercise, view the payment data of the contract.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

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

You've viewed the payment data for a contract.

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 Preconstruction system, 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 Preconstruction 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	00/00/00	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	04/30/17	N	N
Contract Items Complete Date	00/00/00	N	Y

Contract ID: TRN350

Critical Date Description: Notice to Proceed Date
Actual Occurrence Date: 05/17/14 ☐ Required to Activate ☐ Required to Finalize
Distribution List: Recipient ID:
Message Text:

Figure 6. Contracts Window - Critical Dates Panel

HEADQUARTERS CONSTRUCTION AND FINANCE OFFICES UPDATE THE CRITICAL DATES PANEL.

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

SiteManager Critical Date Name	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	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	Date the contract is fully executed (also known as, 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	Completion date established by the contract.
Price Adjustments Base Date	Typically, the first day of the month for the month preceding the Letting Date.
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 that a critical event occurred for the contract.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Click the **Critical Dates** tab. The system displays the Critical Dates panel.

2. In the **Critical Date Description** column, scroll to and click **Notice to Proceed Date**. The system displays the Notice to Proceed Date data in the lower pane.

3. When did the **Notice to Proceed Date** occur? _____

4. When did the **Original Completion Date** occur? _____

You've viewed the actual dates that critical events occurred.

CAN DO DWRS AND DIARIES WITHOUT A NOTICE TO PROCEED DATE, BUT YOU CAN'T GENERATE AN ESTIMATE.

Viewing Contract Primary Personnel

The Primary Personnel panel displays the contract's primary state personnel. Every contract must have a project manager and a project engineer. When users are designated as the Project Manager and Project Engineer on the Contract window's Primary Personnel panel, the system automatically grants them contract authority. If primary personnel are later replaced, SiteManager starts contract authority for the new personnel and ends contract authority for the previous personnel.

The terms Project Manager and Project Engineer are SiteManager terms and have no significance other than the fact that they are the first to receive contract authority.

THE USER INDICATED HERE WILL RECEIVE SYSTEM-GENERATED MESSAGES ABOUT THE CONTRACT.

WHEN A CONTRACT IS PENDING THE PROJECT MANAGER/ ENGINEER FIELD WOULD BE BLANK OR CONTAIN AN "N".

Figure 7. Primary Personnel Panel

THE HEADQUARTERS FINANCE 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 the contract.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Click the **Primary Personnel** tab. The system displays the Primary Personnel panel.

2. Who is the project supervisor for this contract?

    _____

You've viewed the project manager and project engineer assigned to a contract.

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 8. Contracts Window - Prime Contractor Panel

SINCE TDOT DOES NOT RECORD AN INSURANCE COMPANY FOR THE PRIME CONTRACTOR, 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's surety and insurance companies for a contract.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Click the **Prime Contractor** tab. The system displays the Prime Contractor panel.

2. Who is the prime contractor? _____

3. Which bonding company is used? _____

4. Which surety company is used? _____

You've viewed the prime contractor's associates.

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 panel.

Figure 9. Contracts Window - DBE Commit Panel

Exercise 8

In this exercise, view the DBE goal for a contract.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Click the **DBE Commit** tab. The system displays the DBE Commit panel.

2. What is the total current percentage of the DBE commitment?
   _____

3. **Close**. The system closes the Contracts window and displays the Contract Records panel.

You've viewed the DBE goal for a contract.

Note: The Training Plan panel is unavailable because it is obsolete functionality deactivated by AASHTO.

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.
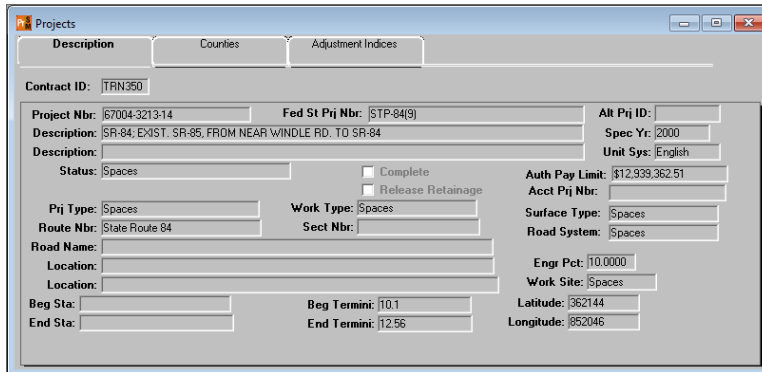
Figure 10. Projects Window - Description Panel

 Exercise 9

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

User ID   **jj00002**   Password   **pass**
Connection   **Server**
Group Name   **FIELD – Operations Office Staff (OSTAFF)**
Prior Keys   **TRN350**

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? _____

7. **Close**. The system closes the Projects window and displays the Contract Records panel.

You've viewed a project description.

Viewing Contract Items

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

THE CATEGORY NBR LABEL DOES NOT DISPLAY PROPERLY IN INQUIRY MODE.

DOES NOT REPRESENT "SPEC BOOK YEAR."
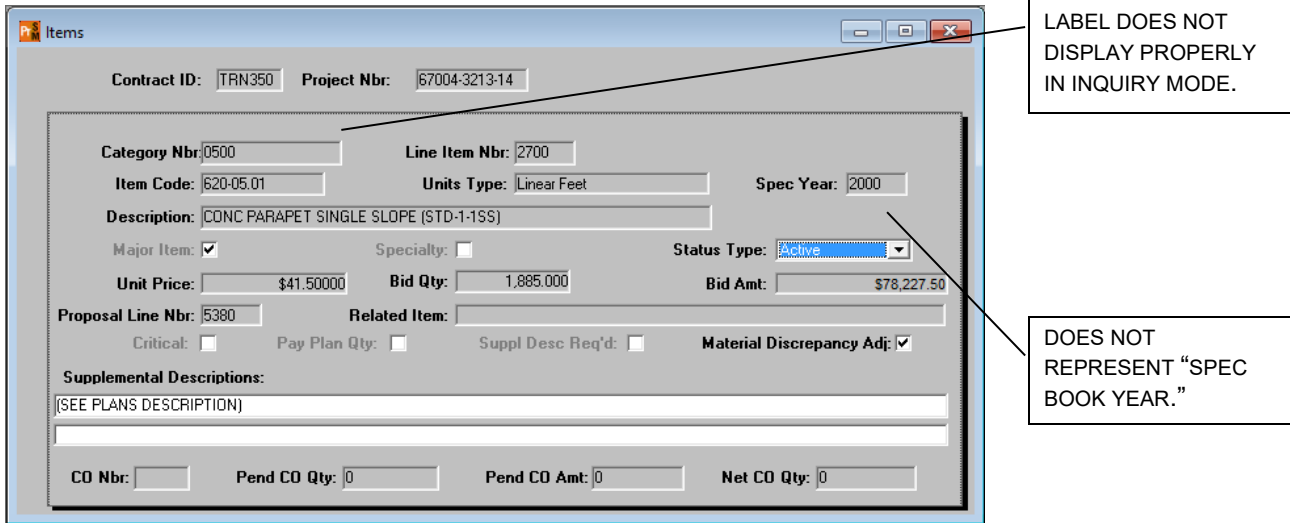
Figure 11. Items Window

ITEMS KNOWN AS "ADD-ON" ITEMS ARE ADDED TO THE CONTRACT BEFORE IT IS ASSIGNED TO THE REGION. 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, EXCEPT FOR THE "ADD-ON" ITEMS LISTED IN THE NEXT SECTION THAT ARE ADDED BY HEADQUARTERS FINANCE.

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 10

In this exercise, review contract items.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

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 and double-click **67004-3213-14**.

Open an item.

3. In the **Contract Item** area, to sort by item code, click the **Item Code** column heading.

4. In the **Item Code** column, double-click **307-01.01** for category number **0100** and line number **0670**. The system displays the Items window for **ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A**.

5. What is the unit price? _____

6. What is the bid quantity? _____

Open 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, double-click **620-05.01** for category number **0500** and line number **2700**. The system displays the Items window for **CONC PARAPET SINGLE SLOPE (STD-1-1SS)**.

10. What is the supplemental description? _____

```
LEAVE
WINDOW
OPEN FOR
NEXT
EXERCISE.
```

You've reviewed contract items.

Viewing TDOT Variable Add-on Items per Specifications

Referring to the following tables, if the contract item exists, then the corresponding item(s) listed as Item(s) Automatically Added to Contract are added to the contract as "add-on" items. The appropriate unit of measure and assigned unit price are also displayed for each item.

HQ ADDS THESE PRIOR TO CONTRACT ACTIVATION.

ONLY THE ITEMS THAT APPLY TO THE CONTRACT BID ITEMS ARE ADDED.

Bid Item On Contract	Item Automatically Added To Contract		
	Item	Unit	Unit Price
203-01	203-01.03 ROAD & DRAINAGE ADD'L MATERIAL	CUBIC YARD	203-01 PRICE X 150%
	203-05 UNDERCUTTING	CUBIC YARD	203-01 PRICE X 150%
204-02.01	204-02.02 EXTRA DEPTH DRY EXCAVATION (A)	CUBIC YARD	204-02.01 PRICE X 150%
	204-02.03 EXTRA DEPTH DRY EXCAVATION (B)	CUBIC YARD	204-02.01 PRICE X 180%
204-03.01	204-03.02 EXTRA DEPTH WET EXCAVATION (A)	CUBIC YARD	204-03.01 PRICE X 150%
	204-03.03 EXTRA DEPTH WET EXCAVATION (B)	CUBIC YARD	204-03.01 PRICE X 180%
204-04.01	204-04.02 EXTRA DEPTH ROCK EXCAVATION (A)	CUBIC YARD	204-04.01 PRICE X 150%
	204-04.03 EXTRA DEPTH ROCK EXCAVATION (B)	CUBIC YARD	204-04.01 PRICE X 180%
307 MIX ITEM	307-03.20 PRICE ADJUSTMENT FOR AC CONTENT	DOLLAR	$1.00
307 ASPHALT ITEM	307-05.40 LIQUID ANTI-STRIP AGENT PAYMENT	DOLLAR	$1.00
	307-05.41 HYDRATED LIME ANT-STRIP AGENT PAY	DOLLAR	$1.00
307 OR 411 ASPHALT ITEM	407-07 DENSITY DEDUCTION	DOLLAR	$1.00
	407-09 A C CONTENT & GRADATION DEDECUTION	DOLLAR	$1.00
411 MIX ITEM	411-03.20 PRICE ADJUSTMENT FOR AC CONTENT	DOLLAR	$1.00
411 ASPHALT ITEM	411-03.40 MATERIAL VARIATION DEDUCTION	DOLLAR	$1.00
	411-05.40 LIQUID ANTI-STRIP AGENT PAYMENT	DOLLAR	$1.00
	411-05.41 HYDRATED LIME ANT-STRIP AGENT PAY	DOLLAR	$1.00
501 ITEM	501-05-03 PRICE ADJ FOR RIDEABILITY (CONCRETE)	DOLLAR	$1.00

Bid Item On Contract	Item Automatically Added To Contract		
	Item	Unit	Unit Price
501-01.20, 501-01.21 OR 501-01.30	501-05-05 ADDL P'LAND CEMENT & CONC (ULTRATHIN)	DOLLAR	$1.00
604-03.01	604-01.08 CLASS A CONC (FOUNDATION LEVELING)	CUBIC YARD	604-03.01 PRICE X 40%
CONCRETE ITEM (EXCLUDING 501 ITEMS)	604-22.50 DEFECTIVE CONCRETE	DOLLAR	$1.00
705-01.01	705-01.50 SHOP CURVED GRDRL @ BRIDGE ENDS	LINEAR FEET	705-01.01 PRICE X 125%
705-12.02	705-01.51 SHOP CRV GRDRL @ BR END (LONG POST)	LINEAR FEET	705-12.02 PRICE X 125%
705-02.02	705-02.50 SHOP CURVED GUARDRAIL	LINEAR FEET	705-02.02 PRICE X 150%
705-02.03	705-02.51 SHOP CURVED GUARDRAIL (LONG POST)	LINEAR FEET	705-02.03 PRICE X 150%
801-01 WITHOUT 801-02	801-02 SEEDING WITHOUT MULCH	UNIT	801-01 PRICE X 45%
801-01 WITHOUT 801-06	801-06 MULCH	UNIT	801-01 PRICE X 60%

Table 2. TDOT Add-on Items per Specifications

TDOT Add-on Items (Before Contract is Activated) per Special Provisions

The following table provides a list of "add-on" items that may be added to a contract before the time of activation.

HQ ADDS THESE PRIOR TO CONTRACT ACTIVATION.

Item	Description	Unit Measure
105-02	FLAGGING ADJUSTMENT	DOLLAR
105-03	RAILROAD FLAGGING (DEDUCT)	DOLLAR
108-01.01	NO EXCUSE BONUS	LUMP SUM
108-07	LIQUIDATED DAMAGES	DAY
108-07.01	LIQUIDATED DAMAGES	WEEK
108-07.02	LIQUIDATED DAMAGES	%
108-08.01	LIQUIDATED DAMAGES (MOWING)	DAY
108-08.02	LIQUIDATED DAMAGES (LITTER)	LINEAR MILE
108-08.03	LIQUIDATED DAMAGES (SWEEPING)	LINEAR MILE
108-08.04	LIQUIDATED DAMAGES	HOUR
108-08.05	LIQUIDATED DAMAGES	LANE
108-08.06	LIQUIDATED DAMAGES	WEEKEND
108-08.07	LIQUIDATED DAMAGES	15 MINUTES
108-08.08	LIQUIDATED DAMAGES	30 MINUTES
108-08.09	LIQUIDATED DAMAGES	EACH
108-10.01	INCENTIVE PAYMENT	DAY
108-10.02	INCENTIVE PAYMENT	DAY
108-10.03	INCENTIVE PAYMENT	DAY
108-10.04	INCENTIVE PAYMENT	DAY
108-10.05	INCENTIVE PAYMENT	DAY
108-10.06	INCENTIVE PAYMENT	DAY
108-10.07	INCENTIVE PAYMENT	DAY
108-10.08	INCENTIVE PAYMENT	DAY
108-10.09	INCENTIVE PAYMENT	DAY
108-10.10	DISINCENTIVE PAYMENT	DAY
108-10.11	DISINCENTIVE PAYMENT	DAY
108-10.12	DISINCENTIVE PAYMENT	DAY
108-10.13	DISINCENTIVE PAYMENT	DAY
108-10.14	DISINCENTIVE PAYMENT	DAY
108-10.15	DISINCENTIVE PAYMENT	DAY
108-10.16	DISINCENTIVE PAYMENT	DAY
108-10.17	DISINCENTIVE PAYMENT	DAY
108-10.18	DISINCENTIVE PAYMENT	DAY
108-10.19	DISINCENTIVE PAYMENT	DAY
108-10.20	DISINCENTIVE PAYMENT	HOUR
108-10.21	DISINCENTIVE PAYMENT	HOUR

Item	Description	Unit Measure
108-10.22	DISINCENTIVE PAYMENT	HOUR
108-10.23	DISINCENTIVE PAYMENT	HOUR
108-10.24	DISINCENTIVE PAYMENT	HOUR
108-10.25	DISINCENTIVE PAYMENT	HOUR
108-10.26	DISINCENTIVE PAYMENT	HOUR
108-10.27	DISINCENTIVE PAYMENT	HOUR
108-10.28	DISINCENTIVE PAYMENT	HOUR
108-10.29	DISINCENTIVE PAYMENT	HOUR
108-10.30	INCENTIVE PAYMENT	HOUR
108-10.31	INCENTIVE PAYMENT	HOUR
108-10.32	INCENTIVE PAYMENT	HOUR
108-10.33	INCENTIVE PAYMENT	HOUR
108-10.34	INCENTIVE PAYMENT	HOUR
108-10.35	INCENTIVE PAYMENT	HOUR
108-10.36	INCENTIVE PAYMENT	HOUR
108-10.37	INCENTIVE PAYMENT	HOUR
108-10.38	INCENTIVE PAYMENT	HOUR
108-10.39	INCENTIVE PAYMENT	HOUR
108-10.40	INCENTIVE PAYMENT	LUMP SUM
108-10.41	INCENTIVE PAYMENT	LUMP SUM
108-10.42	INCENTIVE PAYMENT	LUMP SUM
108-10.43	INCENTIVE PAYMENT	LUMP SUM
108-10.44	INCENTIVE PAYMENT	LUMP SUM
108-10.45	INCENTIVE PAYMENT	LUMP SUM
108-10.46	INCENTIVE PAYMENT	LUMP SUM
108-10.47	INCENTIVE PAYMENT	LUMP SUM
108-10.48	INCENTIVE PAYMENT	LUMP SUM
108-10.49	INCENTIVE PAYMENT	LUMP SUM
108-10.50	INCENTIVE PAYMENT	WEEKEND
108-10.51	INCENTIVE PAYMENT	WEEKEND
108-10.52	INCENTIVE PAYMENT	WEEKEND
108-10.53	INCENTIVE PAYMENT	WEEKEND
108-10.54	INCENTIVE PAYMENT	WEEKEND
108-10.55	INCENTIVE PAYMENT	WEEKEND
108-10.56	INCENTIVE PAYMENT	WEEKEND
108-10.57	INCENTIVE PAYMENT	WEEKEND
108-10.58	INCENTIVE PAYMENT	WEEKEND
108-10.59	INCENTIVE PAYMENT	WEEKEND
108-10.60	DISINCENTIVE PAYMENT	WEEKEND
108-10.61	DISINCENTIVE PAYMENT	WEEKEND

Item	Description	Unit Measure
108-10.62	DISINCENTIVE PAYMENT	WEEKEND
108-10.63	DISINCENTIVE PAYMENT	WEEKEND
108-10.64	DISINCENTIVE PAYMENT	WEEKEND
108-10.65	DISINCENTIVE PAYMENT	WEEKEND
108-10.66	DISINCENTIVE PAYMENT	WEEKEND
108-10.67	DISINCENTIVE PAYMENT	WEEKEND
108-10.68	DISINCENTIVE PAYMENT	WEEKEND
108-10.69	DISINCENTIVE PAYMENT	WEEKEND
108-11	ACCELERATED SCHEDULE INCENTIVE PAYMENT	LUMP SUM
109-01.01	PAYMENT ADJUSTMENT FOR FUEL	DOLLAR
109-01.02	PAYMENT ADJUSTMENT FOR BITUMINOUS MATERIAL	DOLLAR
407-10	ASPHALT CEMENT CONTENT & GRADATION DEDUCTION	DOLLAR
411-03.30	RIDEABILITY DEDUCTION	DOLLAR
411-03.32	RIDEABILITY (SPECIAL PROVISION 411B)	DOLLAR
602-04	STEEL INSPECTION COST	DOLLAR
604-22.50	DEFECTIVE CONCRETE	DOLLAR
604-23.01	RIDEABILITY DEDUCTION (BRIDGES)	DOLLAR

Table 3. TDOT Add-on Items (Before Contract is Activated) per Special Provisions

TDOT Add-on Items (After Contract is Activated) per Specifications

The following table provides a list of "add-on" items that may be added to a contract after the contract is activated.

Item	Description	Unit Measure
108-09.01	DAMAGE TO STATE PROPERTY	DOLLAR
108-09-02	DAMAGE TO STATE PROPERTY	DOLLAR
108-09.03	DAMAGE TO STATE PROPERTY	DOLLAR
108-09.04	DAMAGE TO STATE PROPERTY	DOLLAR
108-09.05	DAMAGE TO STATE PROPERTY	DOLLAR
108-09.06	DAMAGE TO STATE PROPERTY	DOLLAR
108-09.07	DAMAGE TO STATE PROPERTY	DOLLAR
108-09.08	DAMAGE TO STATE PROPERTY	DOLLAR
108-09.09	DAMAGE TO STATE PROPERTY	DOLLAR
108-99	COST OF WORK DONE BY STATE FORCES	DOLLAR
109-05.01	ELIMINATED OR ALTERED ITEM	DOLLAR
109-05.02	ELIMINATED OR ALTERED ITEM	DOLLAR
109-05.03	ELIMINATED OR ALTERED ITEM	DOLLAR
109-05.04	ELIMINATED OR ALTERED ITEM	DOLLAR
109-05.05	ELIMINATED OR ALTERED ITEM	DOLLAR
109-05.06	ELIMINATED OR ALTERED ITEM	DOLLAR
109-05.07	ELIMINATED OR ALTERED ITEM	DOLLAR
109-05.08	ELIMINATED OR ALTERED ITEM	DOLLAR
109-05.09	ELIMINATED OR ALTERED ITEM	DOLLAR
501-05.01	ADDITIONAL PORTLAND CEMENT CONCRETE (RAMP PAVING	CUBIC YARD
501-05.02	PRICE ADJUSTMENT FOR RIDEABILITY (%)	SQUARE YARD
501-05.04	THICKNESS DEFICIENCY (%)	SQUARE YARD
604-01.06	CLASS A CONCRETE ADJUSTMENT (INCREASE)	CUBIC YARD
604-01.07	CLASS A CONCRETE ADJUSTMENT (DECREASE)	CUBIC YARD
606-02.04	STEEL PILES (10 INCH)(CUT-OFFS)	LINEAR FEET
606-03.04	STEEL PILES (12 INCH)(CUT-OFFS)	LINEAR FEET
606-04.04	STEEL PILES (14 INCH)(CUT-OFFS)	LINEAR FEET
606-05.04	UNTREATED TIMBER PILES (SIZE 1)(CUT-OFFS)	LINEAR FEET
606-06.04	UNTREATED TIMBER PILES (SIZE 2)(CUT-OFFS)	LINEAR FEET
606-07.04	TREATED TIMBER PILES (SIZE 1)(CUT-OFFS)	LINEAR FEET
606-08.04	TREATED TIMBER PILES (SIZE 2)(CUT-OFFS)	LINEAR FEET
606-09.04	PRECAST CONCRETE PILES (SIZE 1)(CUT-OFFS)	LINEAR FEET
606-10.04	PRECAST CONCRETE PILES (SIZE 2)(CUT-OFFS)	LINEAR FEET
606-15.05	18" PRESTR CONC PILES (CUT-OFFS)	LINEAR FEET
606-16.04	STEEL PIPE PILES (10-INCH)(CUT-OFFS)	LINEAR FEET
606-17.04	STEEL PIPE PILES (12-INCH)(CUT-OFFS)	LINEAR FEET

Item	Description	Unit Measure
606-18.04	STEEL PIPE PILES (14-INCH)(CUT-OFFS)	LINEAR FEET
606-19.04	STEEL PIPE PILES (16-INCH)(CUT-OFFS)	LINEAR FEET
606-20.04	STEEL PIPE PILES (18-INCH)(CUT-OFFS)	LINEAR FEET
606-20.40	STEEL PIPE PILES (CUT-OFFS) (SIZE)	LINEAR FEET
606-21.40	STEEL PIPE PILES (CUT-OFFS) (SIZE)	LINEAR FEET
606-23.02	STEEL PIPE PILES (24-INCH)(CUT-OFFS)	LINEAR FEET
619-01.02	POLYMER MODIFIED CONC (VARIABLE DEPTH-TYPE 1)	CUBIC YARD
619-01.03	POLYMER MODIFIED CONC (VARIABLE DEPTH-TYPE 3)	CUBIC YARD

Table 4. TDOT Add-on Items (After Contract is Activated) Per Specifications

UPON NOTIFICATION BY OPERATIONS FIELD OFFICE, HEADQUARTERS FINANCE WILL ADD ADD-ON ITEMS WITHOUT A CHANGE ORDER.

THE NEW CONTRACT CHANGE ORDER ITEM FUNCTION IS USED TO ADD NEW ITEMS NOT COVERED BY STANDARD SPECIFICATIONS OR SPECIAL PROVISIONS.

Exercise 11

In this exercise, review an add-on contract item.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. On the toolbar, click **Open**.

2. In the **Contract Item** area, to sort by item code, click the **Item Code** column heading.

3. In the **Item Code** column, double-click **109-01.01** for category number **0100** and line number **9028**. The system displays the Items window for **PAY ADJUSTMENT FOR FUEL**.

4. What is the unit price? _____

5. What is the bid quantity? _____

6. **Close**. The system closes the Items window and displays the SiteManager Panel window.

You've viewed another contract item.

Viewing Contract Funding

The Contract Funding panel lets the user view funding for the whole contract and for the contract's projects, categories, and line items. The Contract Funding panel lists the current funding specifications in the top pane. Data for the selected funding record is displayed in the bottom pane. If the user adds funding that does not match the funding selection on the Contracts 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.
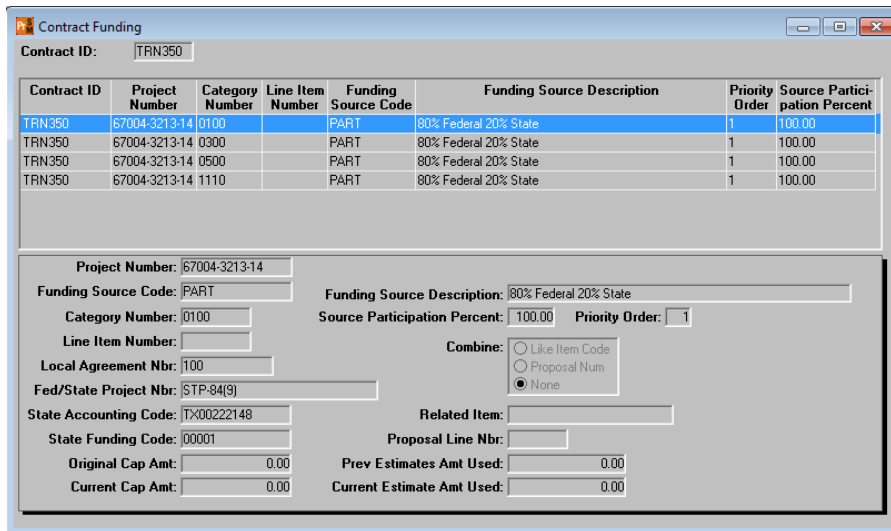
Figure 12. Contract Funding Window (example 1, non-standard funding)
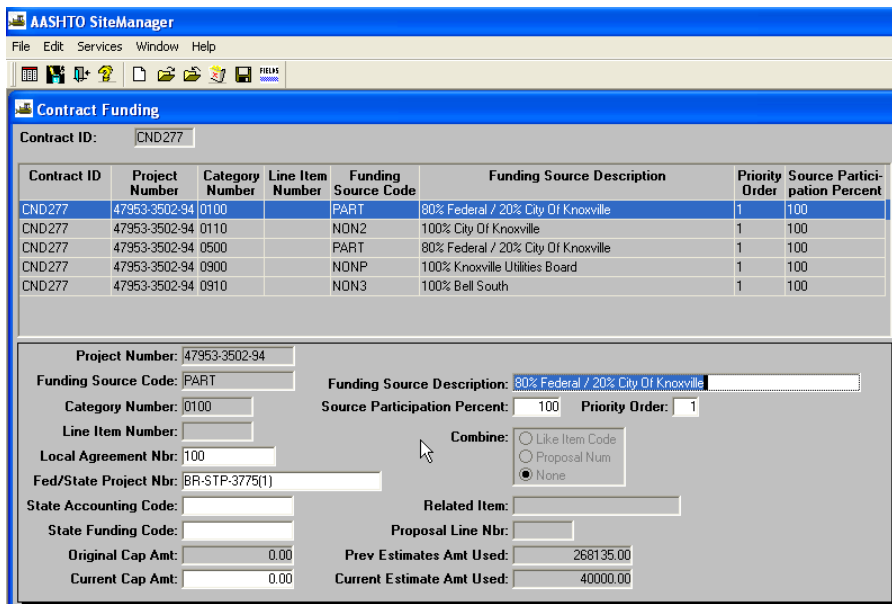
Figure 13. Contract Funding Window (example 2, non-standard funding)

THE CONTRACT FUNDING WINDOW IS LOADED FROM PRECONSTRUCTION.

THE CATEGORY NUMBER IDENTIFIES THE FUNDING SOURCE AND MUST BE GIVEN ATTENTION WHEN RECORDING WORK IN A DWR.

 Exercise 12

In this exercise, view the Contract Funding window.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

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

2. View the contract funding for contract **TRN350** and compare to that in Figure 12.

3. **Close**. The system displays the SiteManager Panel window.

4. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've viewed the funding for a contract.

Viewing Subcontracts

The Subcontract panel displays subcontracts and subcontract data. The panel also displays calculated DBE commitment amounts. The user can define both parent subcontracts and lower level subcontracts.

Figure 14. Description Panel

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.

Subcontract Descriptions

When a new subcontract is approved, the system adds the subcontract amount to the total amount of uncompleted work for the subcontractor. This value is displayed on the Vendors window. The contract's prime contractor cannot be selected as a subcontractor on the contract.

The percentage of the subcontract that can be counted towards the contract's DBE goal depends on the subcontract's level, the subcontractor's DBE status, and whether the subcontract includes Items. A parent subcontract with a DBE subcontractor and items is always counted 100% towards the contract's DBE goal. If the subcontract has no items (that is, the subcontractor is a supplier/hauler), the user enters the percentage counted towards the DBE goal. For nested subcontracts, if a higher-level DBE subcontract is counted 100% towards the DBE goal, the percentage of the nested subcontract is always zero.

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 AT TDOT.

Exercise 13

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

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. On the **Main Panel**, double-click the **Contract Administration** icon.

2. On the **Contract Administration** panel, double-click the **Contractor Management** icon.

3. On the **Contractor Management** panel, 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 **SubCont Nbr** column, scroll to and double-click **00000001**. The system displays the Subcontracts window.

7. What is the approval date for this subcontract?

   _____

8. Is this a "nested" subcontract?

   _____

You've viewed a subcontract.

Viewing Subcontract Items

The Subcontracts window's Items panel displays subcontract items. If the subcontract has items, the subcontract amount is the sum of all the item amounts.

IF THE WORK ITEM IS NOT ASSOCIATED TO THE SUBCONTRACTOR, THE INSPECTOR WILL NOT BE ABLE TO GIVE THE SUBCONTRACTOR CREDIT FOR INSTALLING THE WORK ITEM ON THE DWR.

Figure 15. Subcontracts Window - Items Panel

Exercise 14

In this exercise, view a subcontract item.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. On the Subcontracts window, 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 on this subcontract for item **501-01.03 PORTLAND CEMENT CONCRETE PAVEMENT (PLAIN) 10"** on project **67004-3213-14** and line item **0850**.

   _____

4. **Close**. The system closes the Subcontracts window and displays the SiteManager Panel window.

You've viewed a subcontract item.

Preparing for Field Activities

SiteManager has two modes – server and standalone. Standalone users transfer contract data to their standalone database to perform field reporting using a function called *pipeline*. All preliminary work that would affect their field reporting must be completed on the server before they pipeline the contract data to standalone.

> AFTER THE TDOT HEADQUARTERS CONSTRUCTION AND FINANCE OFFICES HAVE COMPLETED THEIR CONTRACT ACTIVATION ACTIVITIES, AN EMAIL NOTIFICATION WILL BE SENT TO OFFICE STAFF RELEASING THE CONTRACT TO BEGIN FIELD PREPARATION ACTIVITIES.
>
> THESE ARE THE MINIMUM ACTIVITIES THAT MUST OCCUR TO MAKE IT POSSIBLE FOR THE FIELD INSPECTION STAFF TO PIPELINE AND BEGIN FIELD REPORTING: UPDATE CONTRACT MASTER LIST; GRANT CONTRACT AUTHORITY TO FIELD STAFF, IF NECESSARY; AND VERIFY ASSOCIATION OF MATERIALS SAMPLE AND TESTING REQUIREMENTS TO THE CONTRACT. UPON COMPLETION OF THE FIELD PREPARATION ACTIVITIES BY THE OFFICE STAFF AND THE CONFIRMATION OF THE MATERIALS GENERATION OFFICE STAFF WILL ENTER THE ACTUAL DATE OF THE 'FIELD PREP COMPLETE' KEY DATE.

Understanding the Contract Master List

The Contract Master List allows the active equipment, personnel types, and staff members on the Vendor's Master List to be associated to a specific contract. The Vendor Master List data for the prime contractor and any approved Subcontractors are available to associate with the contract. The Contract Master List controls the dropdown lists used in the DWR window to report daily equipment, personnel, and staff presence at the contract site.

Contract Master Lists are created on the SiteManager server. For the content to be available in standalone, the contract must be pipelined down before the data will be available in the dropdown lists for equipment, personnel types, and staff members on the DWR. No change to Contract Master List content is permitted in standalone.

> USE THE CONTRACT MASTER LIST TO ASSOCIATE THE FOLLOWING FOR THE PRIME CONTRACTOR AND SUBCONTRACTORS ON A CONTRACT: EQUIPMENT, PERSONNEL, AND STAFF MEMBER.
>
> EQUIPMENT AND PERSONNEL WILL BE ASSOCIATED FOR THE PRIME CONTRACTOR AND ALL SUBCONTRACTORS AT THE BEGINNING OF THE PROJECT AND FOR ALL ADDITIONAL SUBCONTRACTORS ADDED THROUGHOUT THE LIFE OF THE CONTRACT.
>
> UPON SUBCONTRACT APPROVAL FROM HQ CONSTRUCTION AN EMAIL NOTIFICATION WILL BE SENT TO THE DESIGNATED OFFICE STAFF. AT THIS TIME, EQUIPMENT AND PERSONNEL ASSOCIATIONS FOR THE SUBCONTRACTOR SHALL BE MADE.
>
> THE SUPERVISOR MASTER LIST FUNCTION WILL NOT BE USED.

Exercise 15

In this exercise, open the contract master list for a contract.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Click the **Main Panel** tab. The system displays the Main Panel panel.

2. Double-click the **Daily Work Reports** icon. The system displays the Daily Work Reports panel.

3. Double-click the **Reference Tables** icon. The system displays the Reference Tables panel.

4. Double-click the **Contract Master List** icon. The system displays the Select Contract Vendor window.

5. In the **Contract ID** area, in the **Contract ID** column, scroll to and double-click **TRN350**.

6. In the **Vendor** area, scroll to and double-click **Highways, Inc.**

You've opened the contract master list for a contract's vendor.

Associating Vendor Equipment with the Contract

Only the *active* equipment that has been added to the vendor master list may be associated with the contract.
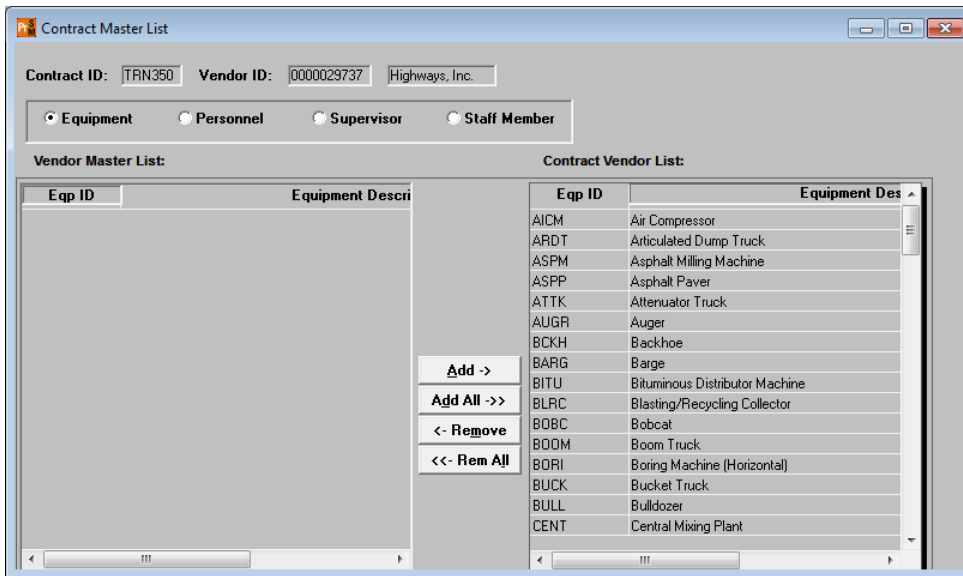
Figure 16. Contract Master List Window - Equipment Panel

Exercise 16

In this exercise, associate equipment from a vendor master list to the contract master list.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Click the **Equipment** button, if not already selected.

2. To add all equipment, click the **Add All** button.
   Note all equipment options available from the Vendor Master List pane have been associated to the selected vendor for the selected contract.

3. **Save**.

You've associated vendor's equipment to the contract master list.

Associating Vendor Personnel Types with the Contract

Only the *active* personnel types that have been added to the vendor master list may be associated with the contract.
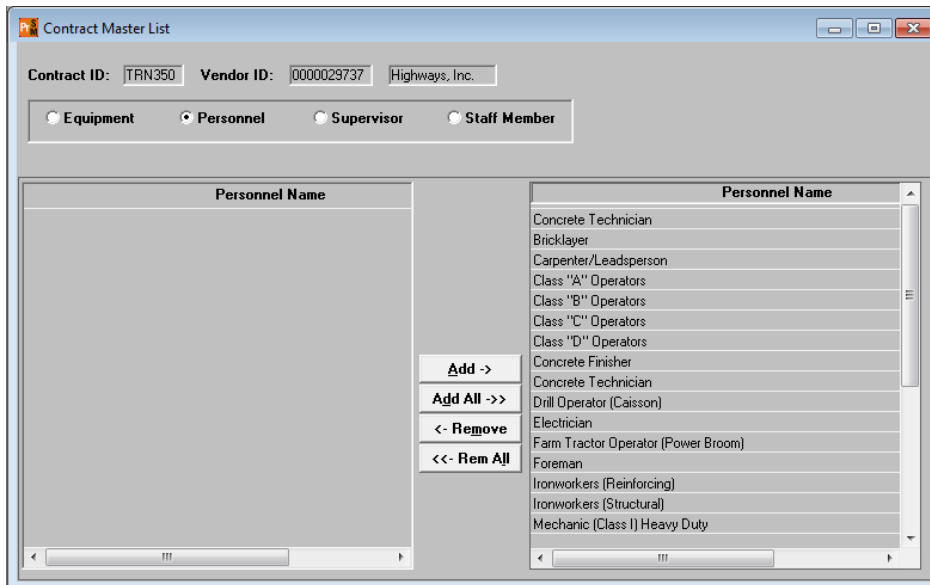
Figure 17. Contract Master List Window - Personnel Panel

SUPERVISOR NAMES WILL NOT BE MAINTAINED IN THE SUPERVISOR SECTION OF THE CONTRACT MASTER LIST FUNCTION. INSTEAD, SUPERVISOR TYPES, SUCH AS SUPERINTENDENT OR FOREMAN, ARE INCLUDED IN THE PERSONNEL SECTION.

Exercise 17

In this exercise, associate all personnel types from a vendor master list to the contract master list.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Click the **Personnel** button.

2. To add all personnel, click the **Add All** button.
    Note all personnel types available from the Vendor Master List pane have been associated to the selected vendor for the selected contract.

3. **Save**.

You've associated vendor's personnel types to the contract master list.

Associating Staff Members with the Contract

Only the *active* staff members that have been added to the vendor master list may be associated with the contract.
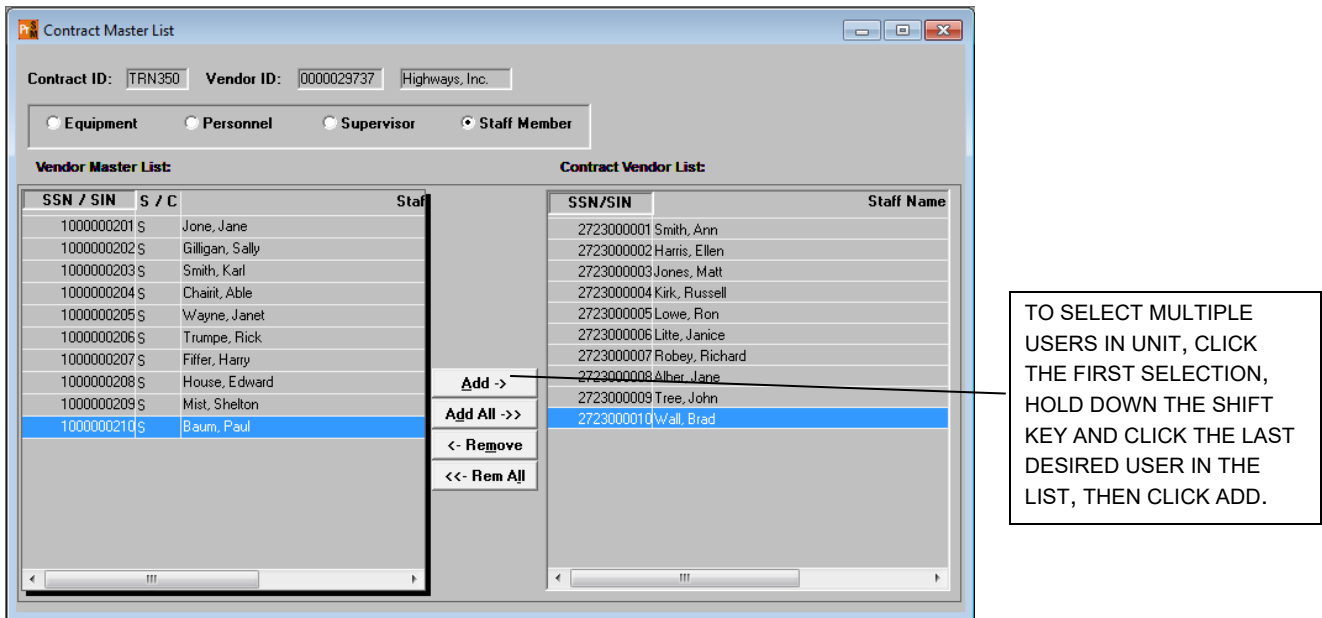
Figure 18. Staff Member Window

OFFICE STAFF WILL ASSOCIATE STAFF MEMBERS FROM THE VENDOR MASTER LIST TO THE CONTRACT VENDOR LIST.

REGIONAL SUPPORT MAINTAINS THE VENDOR MASTER LIST. CONTACT THEM IF ADDITIONAL STAFF MEMBERS ARE NEEDED.

THE SSN/SIN WILL BEGIN WITH THE FIRST FOUR DIGITS OF THE DISTRICT OFFICE FOR STATE EMPLOYEES AND A SIX (6) FOR CONSULTANTS.

Exercise 18

In this exercise, associate agency staff from a vendor's master list to the contract master list.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Click the **Staff Member** button.

2. In the **Vendor Master List** pane, click **2723000001** (the first person for Unit 723 of Region 2).

3. Press and hold down the **Shift** key.

4. Scroll to click **2723000010** (the last person for Unit 723 of Region 2). *All of the staff members in Region 2, Unit 723 have been selected.*

5. To add the selected choices, click the **Add** button. *Note the selected staff members available from the Vendor Master List pane have been associated to the selected vendor for the selected contract.*

6. **Save**.

You've associated a vendor's agency staff to the contract master list.

Contract Master List and Subcontractors

In the Contract Master List window, equipment and personnel types need to be associated for the prime contractor and each subcontractor. However, staff members only need to be associated to the prime contractor.

Exercise 19

In this exercise, add equipment and personnel types to the contract master list for a subcontractor.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Click the **Open** button. The system displays the Select Contract Vendor window.

2. On the **Vendor** list box, scroll to and double-click **WMC Contracting Company, Inc.**

Associate the equipment.

3. Click the **Equipment** button.

> BECAUSE STAFF WAS ALREADY ASSIGNED FOR THE CONTRACT, IT IS NOT NECESSARY TO REPEAT THAT ASSOCIATION SINCE IT IS NOT CONTRACTOR SPECIFIC.

4. To add all equipment, click the **Add All** button.

5. **Save**.

Associate the personnel.

6. Click the **Personnel** button.

7. To add all personnel, click the **Add All** button.

8. **Save**.

9. **Close**. The system displays the SiteManager Panel window.

10. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've added equipment and personnel types to the contract master list for a subcontractor.

Granting Contract Authority

Contract authority gives the user the authority to view or modify a specific contract. Contract authority works in conjunction with other security features. The user's ability to add, modify, or delete contract data also depends on the user's group assignments, the office level assignment, and whether the user has global (office-wide) contract access.

Adding Users to Contract Authority

The Contract Authority window displays the users, office-level assignments, global contract access indicator, and group assignments for each individual user. An authorized user can end contract authority for personnel no longer needed to work on the contract by selecting the appropriate contract authority assignment row for the user and then selecting End Contract Authority from the Services menu.
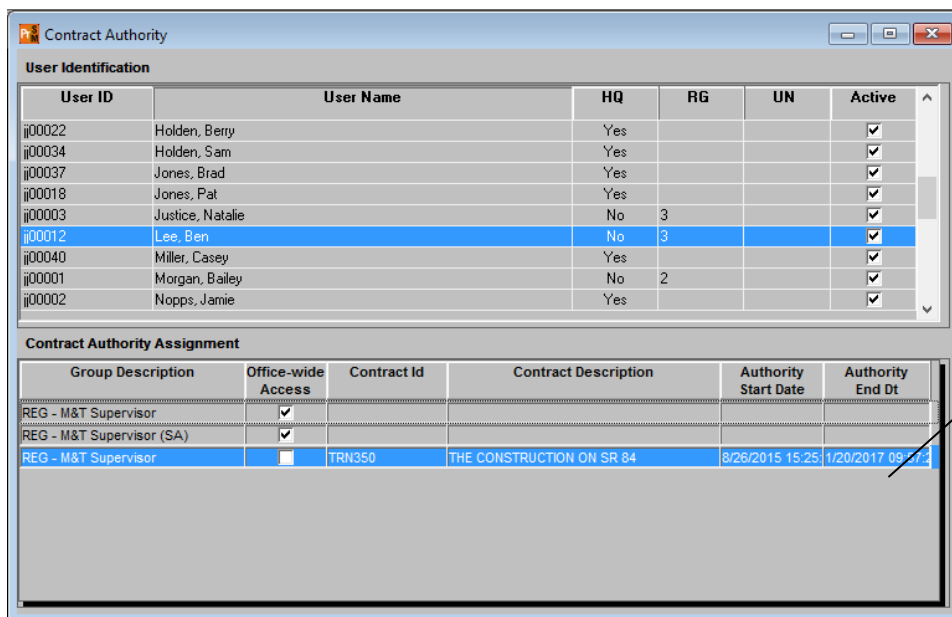
Figure 19. Contract Authority Window

BY DEFAULT, STAFF MEMBERS HAVE OFFICE-WIDE ACCESS AND WILL NOT REQUIRE CONTRACT AUTHORITY GRANTED MANUALLY.

OFFICE-WIDE CONTRACT AUTHORITY CAN BE REMOVED BY CONTACTING REGIONAL SUPPORT. DISTRICT SUPERVISORS AND OFFICE STAFF CAN ASSIGN AND REMOVE CONTRACT AUTHORITY.

Exercise 20

In this exercise, grant and end contract authority.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

> EXERCISE WILL ASSOCIATE CONTRACT AUTHORITY FOR AN INSPECTOR THAT DOES NOT HAVE OFFICE-WIDE CONTRACT AUTHORITY. PRESUME THIS INSPECTOR HAS OFFICE-WIDE ACCESS FOR A DIFFERENT OFFICE.

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. The system displays the Contract Records panel.

3. Double-click the **Contract Authority** icon. The Contract Authority window opens.

Give a user authority for a contract.

4. In the **User Name** column, scroll to and select **Singer, Emma** with user ID **jj00011**.

5. Click the **New** button. The system displays the New Contract Group Authority window.

6. In the **Group Description** field, select **INSP – Field Operations Inspector**.

7. In the **Contract ID** field, right-click and select **Search**. The system displays the Search Window window.

8. In the Contract ID column, scroll to and select **TRN350**.

9. Click **OK**.

10. **Save**.

Activating Contracts for Office Documentation

End contract authority for another user.

11. In the **User Name** column, scroll to and select **Lee, Ben** with user ID **jj00012**.

12. In the **Contract Authority Assignment** area, in the **Group Description** column, select **REG – M&T Supervisor** for contract **TRN350**.

13. From the **Services** menu, select **End Contract Authority**. The date and time that contract authority was ended is entered in the Authority End Dt field.

14. **Close**. The system displays the SiteManager Panel window.

You've managed users' contract authority.

Verifying Association of Materials Sample and Testing Requirements

Before pipelining the contract to standalone, verify receipt of an email notification stating that contract materials are ready by Regional Materials & Tests. This will trigger an automatic email notification to the District Supervisor, Office Staff and Regional Materials & Tests.

From: **TDOT SiteManagerSMTP** <TDOT.SiteManagerSMTP@tn.gov>
Date: Fri, Jan 18, 2014 at 10:35 AM
Subject: Contract Materials are Ready for CN0350
To: joseph.young@tn.gov

Contracted Materials are ready on 01/18/2014 for Contract ID CN0350 by Regional Materials.
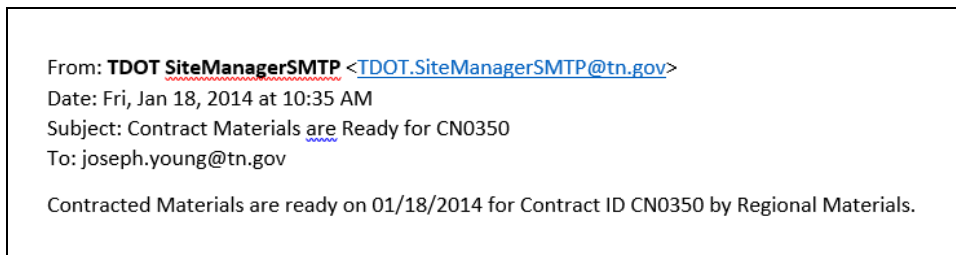
Figure 20. Example "Contract Materials are Ready" Email

If an email has not been received, notify your Regional Materials Support contact.

Upon completion of the following requirements, notify inspectors that the contract is ready to be pipelined.

- Updating Contract Master List

- Granting Contract Authority to Field Staff working outside their assigned unit and consultants

- Verifying association of Materials Sample & Testing Requirements

- Field Prep Complete key date is entered

Master lists, contract authority and verification of materials sampling and testing requirements should ALWAYS precede pipelining the contract to standalone. If field personnel inadvertently pipelined a contract before these two steps were done, they would have insufficient data in their SiteManager standalone database to correctly perform their job on the work site.

STRESS IMPORTANCE!

Summary

To open a contract from the Contracts window:

1. On the **Main Panel**, double-click the **Contract Administration** icon.

2. Double-click the **Contract Records** icon.

3. Double-click the **Contracts** icon. The system displays the Contracts window.

4. Click **Open**. The system displays the Select Contract window.

5. Scroll to and double-click the Contract ID or perform a Find. The system closes the Select Contract window and displays the Contracts window.

To view a contract's description:

1. Open a contract.

2. On the Contracts window, click the **Description** tab.

To view a contract's location:

1. Open a contract.

2. On the **Contracts** window, click the **Location** tab.

To view a contract's payment data:

1. Open a contract.

2. On the **Contracts** window, click the **Payment Data** tab.

To view the actual date of a contract critical date:

1. Open a contract.

2. On the **Contracts** window, click the **Critical Dates** tab.

3. In the **Critical Date Description** list box, scroll to and click the date. The system displays the data for the selected date in the lower pane.

To view a contract's primary personnel:

1. Open a contract.

2. On the **Contracts** window, click the **Primary Personnel** tab.

To view a contract's prime contractor:

1. Open a contract.

2. On the **Contracts** window, click the **Prime Contractor** tab.

To view a contract's DBE goal:

1. Open a contract.

2. On the **Contracts** window, click the **DBE Commit** tab.

To view a project on a contract:

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

2. Double-click the **Contract Records** icon.

3. Double-click the **Projects** icon. The system displays the Projects window.

To view an item on a contract:

4. On the **Main Panel** panel, double-click the **Contract Administration** icon.

5. Double-click the **Contract Records** icon.

6. Double-click the **Items** icon. The system displays the Items window.

7. Click **Open**.

8. In the **Contract ID** area, scroll to and double-click the desired contract. The system displays the projects for the selected contract.

9. In the **Project** area, scroll to and click the desired project.

10. In the **Contract Item** area, scroll to and click the desired item.

11. Click **OK**. The system displays the Items window and the data for the selected item.

Activating Contracts for Office Documentation

To view contract funding:

1. On the **Contract Records** panel, double-click the **Funding** icon.

2. In the **Contract ID** list box, double-click the contract.

3. Click **OK**.

To view a subcontract:

1. On the **Contractor Management** panel, double-click the **Subcontracts** icon.

2. Click **Open**.

3. In the **Contract ID** column, scroll to and double-click the contract.

4. In the **Subcontract** column, scroll to and click the subcontract.

5. Click **OK**. The system displays data for the selected subcontract.

To view an item on a subcontract:

1. On the **Contractor Management** panel, double-click the **Subcontracts** icon. The system displays the Subcontracts window.

2. Click **Open**.

3. In the **Contract ID** column, scroll to and double-click the contract.

4. In the **Subcontract** column, scroll to and click the subcontract.

5. Click **OK**. The system displays data for the selected subcontract.

6. Click the **Items** tab.

To open the Contract Master List:

1. On the **Main Panel**, double-click the **Daily Work Reports** icon.

2. Double-click the **Reference Tables** icon.

3. Double-click the **Contract Master List** icon. The system displays the Select Contract Vendor window.

4. In the **Contract ID** column, scroll to and double-click the desired contract.

5. In the **Vendor** column, scroll to and double-click the desired vendor. The system displays the Contract Master List window.

To associate Vendor Master List equipment to a contract:

1. Open the Contract Master List window.

2. Click the **Equipment** button.

3. Click the **Add All** button to add all the Vendor Master List data.

   or

   Select the desired equipment and click the **Add** button to add that single selection.

4. **Save**.

To associate Vendor Master List personnel types to a contract:

1. Open the Contract Master List window.

2. Click the **Personnel** button.

3. Click the **Add All** button to add all the Vendor Master List data.

   or

   Select the desired personnel and click the **Add** button to add that single selection.

4. **Save**.

To associate staff members to a contract:

1. Open the Contract Master List window.

2. Click the **Staff Member** button.

3. Click the **Add All** button to add all the Vendor Master List data.

4. **Save**.

To add contract authority to a user:

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

2. Double-click the **Contract Records** icon.

3. Double-click the **Contract Authority** icon. The system displays the Contract Authority window.

4. Select the desired user ID.

5. Click **New**. The system displays the New Contract Group Authority window.

6. In the **Group Description** field, select the desired group.

7. Type the **Contract ID** or use the Search function to select a specific contract.

8. **Save**.

To end contract authority for a user:

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

2. Double-click the **Contract Records** icon.

3. Double-click the **Contract Authority** icon. The system displays the Contract Authority window.

4. Select the desired user ID.

5. Select the desired contract authority assignment.

6. From the **Services** menu, click **End Contract Authority**.

To update a key date record:

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

2. On the **Contract Administration** panel, double-click the **Contract Records** icon.

3. On the **Contract Records** panel, double-click the **Key Dates** icon. The system displays the Select Contract window.

4. In the **Contract ID** area, in the **Contract ID** column, scroll to and double-click the desired contract. The system displays the Key Dates window.

5. In the upper pane, in the **Key Date Type** column, select the desired key date.

6. In the **Actual Date** field, type the actual date the key date occurred.

7. **Save**.

Review Exercise

In this exercise, view and prepare a contract for the field.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff (OSTAFF)**		
Prior Keys	**TRN350**		

1. Navigate to Contracts window.

2. Open contract **TRN349**.

3. To which region and unit is the contract assigned?
   _____

4. What is the execution date of the contract?
   _____

5. What is the surety company?
   _____

6. Navigate to the Contract Item window.

7. Open the item **621-03.04** described as **30" TEMPORARY DRAINAGE PIPE** for contract **TRN349**, **p**roject **67004-3213-14**, category number **0100** and line number **1090**.

8. Is the item an add-on item and how can you tell?
   _____

9. Navigate to the **Contractor Management** panel.

10. Open the Subcontracts window. For contract **TRN349,** open subcontract **00000003**.

11. Who is the subcontractor?
    _____

12. Is the subcontractor a DBE? _____

13. Could the subcontractor begin working? _____

14. Navigate to the **Main Panel** panel.

15. Navigate to the **Daily Work Reports** panel and to the **Reference Tables (DWR+)** panel and open the **Contract Master List** window.

16. For the prime contractor of contract **TRN349**, **Highways, Inc**, associate all the equipment, all the personnel, and the staff members for **Region 2, Unit 723**.

17. For subcontractor, **Southern States Survey**, on contract **TRN349**, associate equipment and personnel.

18. Navigate to the Contract Authority window.

19. Give **Michele Dooley** contract authority for both **FIELD - Operations Inspector** and **FIELD - Operations Inspector (SA)** groups for contract **TRN349**.

20. **Save**.

21. **Exit SiteManager**.

You've viewed and prepared a contract for the field.

Initializing Contracts
for Office Documentation

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

After the Office Staff has completed preparations for field activities and released the contract to its field inspection staff so that field reporting can begin, additional contract initialization activities shall be performed before the first estimate can be processed.

These activities include:

- Schedule Key Dates

- Schedule Checklist Event Dates

- Enter the Work Start Key Date.

- Generate the Starting Notice Report

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:

- Critical Dates (of the Contract window)

CRITICAL DATES ARE NOT UPDATED BY FIELD PERSONNEL.

- Key Dates

- Checklist Event Dates

- Milestone Dates

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.

| Distribution List: | | Recipient: | |
| Message Text: | | | |

Figure 1. Recipients Entered Here Will Be Notified for Each Event

TDOT USES RECIPIENTS ONLY AND NOT DISTRIBUTION LISTS.

Date Type	When the Message Is Sent	To Whom the Message Is Sent
Critical Dates (Single Occurrence)	When a value is entered in the Actual Date Field by a Headquarters user.	In-box of the Recipient indicated.
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.
	When a value is entered in the Actual Date Field by a User.	In-box of Recipient indicated.
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 indicated.
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.

Table 1. SiteManager Dates

Understanding Key Dates and Checklist Events

Use key dates and checklist events functionality to establish and monitor a series of key dates and scheduled events. Key dates and checklist events, although similar in functionality, are independent events.

- **Key Dates** are dates that are important when they occur and when they do not occur. A single recipient is notified when a key date is accomplished and 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.

  > NOTIFIED WHEN ENTERED AND IF NOT ENTERED.

- **Checklist Events** are actions that are important when they do not occur. For checklist events that occur more than once or at regular intervals (for example, monthly or weekly), the system tracks each occurrence. A checklist event can be set up to be required when the contract is activated or finalized, or to cause a discrepancy when estimates are generated. The user creates the checklist event schedule on the Checklist Scheduled Events window.

  > NOTIFIED IF NOT ENTERED BY PROJECTED DATE

- **Checklist Event Dates** window displays the checklist event schedule, including multiple occurrences of each event, and provides a chronological history of the events. The user records the actual occurrences of the checklist events on this window.

  > TWO PLACES FOR CHECKLIST EVENTS:
  >
  > 1. YOU SCHEDULE
  >
  > 2. YOU ENTER DATE

Scheduling Key Dates

The Key Dates window displays the key dates for the selected contract in the top pane and the data for the selected key date in the bottom pane. 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 default key dates.

Figure 2. Key Dates Window

THE KEY DATES WINDOW IS USED BY OFFICE STAFF AND REGIONAL MATERIALS AND TESTS TO SCHEDULE PROJECTED DATES AND ENTER ACTUAL DATES.

ALL DEFAULT KEY DATES WILL APPEAR FOR THE CONTRACT WHEN THE CONTRACT IS LOADED INTO SITEMANAGER. AS PART OF THE CONTRACT ACTIVATION PROCESS, THE OFFICE STAFF PERSONNEL WILL PERFORM THE FOLLOWING FUNCTIONS:

- DELETE KEY DATES THAT DO NOT APPLY TO THE CONTRACT
- ENTER THE PROJECTED DATE FOR EACH KEY DATE
- ENTER THE ACTUAL DATE FOR THE STARTING NOTICE KEY DATE

UPON RECEIPT OF THE STARTING NOTICE REPORT, THE HEADQUARTERS FINANCE OFFICE WILL UPDATE THE CRITICAL DATES WINDOW WITH THE NOTICE TO PROCEED DATE AND WORK BEGIN DATE. OFFICE STAFF WILL ENTER THE STARTING NOTICE KEY DATE IN SITEMANAGER PRIOR TO GENERATING THIS 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 1

In this exercise, delete an unnecessary key date record and schedule the key dates for a contract.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN350**		

1. Start and log onto SiteManager as user **jj00002** *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 **Key Dates** icon. The system displays the Select Contract window.

5. In the **Contract ID** area, in the **Contract ID** column, scroll to and double-click **TRN350**. The system displays the Key Dates window.

Delete an unnecessary key date record.

6. In the upper pane, in the **Key Date Type** column, select **CC-3**.

7. On the toolbar, click the **Delete** button. SiteManager prompts you to confirm the deletion.

8. In the message, click **Yes**.

Update a key date record.

9. In the upper pane, in the **Key Date Type** column, select **Starting Notice**.

10. In the lower pane, in the **Projected Date** field, type **051614**.

11. In the **Actual Date** field, type **061714**.

12. In the **Recipient** field, right-click and select **Search**. The system displays the Search Window window.

13. In the **User Name** column, double-click **Nopps, Jamie** (user ID, jj00002).

14. **Save**.

Update another key date record.

15. In the upper pane, in the **Key Date Type** column, select **Completion Notice (Date Time Stopped)**.

16. In the lower pane, in the **Projected Date** field, type **040216**.

17. In the **Recipient** field, right-click and select **Search**. The system displays the Search Window window.

18. In the **User Name** column, double-click **Nopps, Jamie** (user ID, jj00002).

19. **Save**.

20. Why provide a projected date for this event?

    _____

21. **Close**. The system closes the Key Dates window and displays the SiteManager Panel window.

You've accessed the Key Dates window and updated key date records.

Scheduling Checklist Event Projected Dates

The Checklist Scheduled Events window lists the scheduled events for the selected contract in the upper pane and the data for the event selected in the lower pane. The event types are pre-defined in the system code tables. SiteManager adds a set of default checklist events automatically to each new contract. The user creates the checklist event schedule on this window. The user can add, modify, and delete default checklist events.

<table>
<tr><td>RECIPIENTS ARE NOTIFIED WHEN A SCHEDULED EVENT DOES NOT OCCUR ON TIME.</td></tr>
</table>

For example:

- Add a checklist event when the event type needed is not listed.

- Delete an unneeded checklist event.

- Change an existing checklist event, such as modifying the frequency of the event.

When an event is scheduled on this window, a subsequent batch process creates a record for each projected date. After the batch process runs, the user can record the actual date of each occurrence of an event on the Checklist Event Dates window. The batch process and/or an estimate discrepancy may notify the recipient(s) when a checklist event is overdue.

<table>
<tr><td>TO STOP EXCEPTIONS ON JOBS AFTER WORK IS COMPLETE, BUT BEFORE THE FINAL ESTIMATE HAS BEEN RUN, REFER TO "REVIEWING AND RESOLVING ESTIMATE DISCREPANCIES" OF SECTION "CONTRACT FINALIZATION."</td></tr>
</table>

Figure 3. Checklist Scheduled Events Window

THE OFFICE STAFF USES THE CHECKLIST SCHEDULED EVENTS WINDOW TO CREATE THE CHECKLIST EVENT SCHEDULE.

ALL DEFAULT CHECKLIST EVENTS WILL APPEAR FOR THE CONTRACT WHEN THE CONTRACT IS LOADED INTO SITEMANAGER. DURING CONTRACT INITIALIZATION PROCESS, THE OFFICE STAFF PERSONNEL WILL PERFORM THE FOLLOWING FUNCTIONS:

- DELETE CHECKLIST EVENT DATES THAT DO NOT APPLY FOR THE CONTRACT.

- ENTER THE NEXT PROJECTED DATE FOR EVERY EVENT. IF NOTHING IS ENTERED, SITEMANAGER WILL ENTER THE NEXT LOGICAL DATE AFTER THE NOTICE TO PROCEED DATE. A NEXT PROJECTED DATE SHOULD BE ENTERED FOR ALL CHECKLIST EVENTS.

- ENTER THE NUMBER OF OCCURRENCES AS 999 FOR MONTHLY AND QUARTERLY.

- ENTER THE APPROPRIATE RECIPIENT.

THE CONTRACT STATUS MONITOR PROCESS RUNS NIGHTLY AND AUTOMATICALLY POPULATES THE CORRECT NUMBER OF CHECKLIST EVENTS.

Checklist Event	Event Group Type	Frequency	Recipient	Who Enters Next Date	Comment
Attestation for Illegal Immigrants	Contractor Management	Semi-Annually	District Supervisor designee	FIELD – Operations Office Staff	Next Projected Date = First day of the applicable event month (January 01 or July 01)
Contractor's Employee Interview	Civil Rights	Monthly	District Supervisor designee	FIELD – Operations Office Staff	Next Projected Date = First day of the month of the Effective Date
Contractor's Payrolls	Contractor Management	Monthly	District Supervisor designee	FIELD – Operations Office Staff	Next Projected Date = First day of the month of the Effective Date
Contractor ESHP Cert – CL 107-01.01	Contractor Management	One Time Only	District Supervisor designee	FIELD – Operations Office Staff	Next Projected Date = Effective Date of the Contract Change the "Frequency Type" field from "One Time Only" to anything else (e.g. Weekly). Enter "1" in the "Number of Occurrences" field, change the "Frequency Type" to "One Time Only," and proceed.

Checklist Event	Event Group Type	Frequency	Recipient	Who Enters Next Date	Comment
Contractor Performance Evaluation	Contractor Management	Annually	District Supervisor designee	FIELD – Operations Office Staff	Next Projected Date = First day of the applicable event month (end of year or completion of project)
Critical Path Method	Contractor Management	Monthly	District Supervisor designee	FIELD – Operations Office Staff	Next Projected Date = Effective Date
DBE Signed Subcontract(s) on File	Civil Rights	One Time Only	District Supervisor designee	FIELD – Operations Office Staff	Next Projected Date = Effective Date Change the "Frequency Type" field from "One Time Only" to anything else (e.g. Weekly). Enter "1" in the "Number of Occurrences" field, change the "Frequency Type" to "One Time Only," and proceed.
On the Job Training	Civil Rights	One Time Only	District Supervisor designee	FIELD – Operations Office Staff	Next Projected Date = Effective Date Change the "Frequency Type" field from "One Time Only" to anything else (e.g. Weekly). Enter "1" in the "Number of Occurrences" field, change the "Frequency Type" to "One Time Only," and proceed.
Prompt Payment to Subcontractors	Contractor Management	Monthly	District Supervisor designee	FIELD – Operations Office Staff	Next Projected Date = First day of the second month following the Effective Date
Traffic Control Checklist	Safety	Monthly	District Supervisor designee	FIELD – Operations Inspector	Next Projected Date = First day of the month following the Effective Date

Table 3. TDOT Default Checklist Events

Exercise 2

In this exercise, schedule the checklist events for a contract.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN350**		

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

2. In the **Event Type** column, select **DBE Signed Subcontract(s) on File**.

3. In the **Next Proj Date** field, type **053114**.

4. On the **Frequency Type** dropdown list, select **Quarterly**.

> STEPS 4-6 DEMONSTRATE THE WORK AROUND FOR ONE TIME ONLY CHECKLIST EVENTS.

5. In the **Number of Occurrences** field, type **1**.

6. In the **Frequency Type** dropdown list, select **One Time Only**.

7. In the **Recipient** field, right-click and select **Search**. The system displays the Search Window window.

8. In the **User Name** column, double-click **Nopps, Jamie** (user ID, jj00002).

9. Click **OK**.

10. **Save**.

Schedule an additional checklist event.

11. In the **Event Type** column, scroll to and select **Traffic Control Checklist**.

12. In the **Next Proj Date** field, type **053114**.

13. In the **Number of Occurrences** field, type **999**.

14. In the **Recipient** field, right-click and select **Search**.

15. In the Search Window window, scroll to and click **jj00002 Nopps, Jamie**.

16. Click **OK**.

17. **Save**.

18. **Close**. The system closes the Checklist Scheduled Events window.

You've scheduled checklist events.

Starting Milestones

Use the Milestones window to modify and delete contract milestones.

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 <u>no</u> charge on the Diary window's 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).

Figure 4. Milestones Window

FOR OFFICE STAFF TO START MILESTONES, HQ FINANCE MUST FIRST CREATE THE MILESTONES.

OFFICE STAFF ENTERS THE DATES THE MILESTONE WORK WAS STARTED AND COMPLETED. MILESTONES ARE TYPICALLY USED ONLY ON MAINTENANCE OPERATIONS CONTRACTS SUCH AS MOWING AND LITTER REMOVAL.

  Exercise 3

In this exercise, start milestones for a contract.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN350**		

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

Start a milestone.

2. In the upper pane, in the **Mlstn Nbr** column, select **01**.

3. In the lower pane, in the **Work Start** field, type **090914.**

4. **Save**.

Start another milestone.

5. In the upper pane, in the **Mlstn Nbr** column, select **02**.

6. In the lower pane, in the **Work Start** field, type **111014**.

7. **Save**.

8. **Close**. The system closes the Milestones window and displays the SiteManager Panel window.

9. Click the **Contract Administration** tab. The system displays the Contract Administration panel.

You've started milestones.

Summary

To schedule a checklist event:

1. On the **Contract Records** panel, double-click the **Checklist Scheduled Events** icon.

2. On the **Event Group Type** dropdown list, select the desired event group type.

3. On the **Frequency Type** dropdown list, select the desired frequency type. *If the frequency type is either monthly, weekly, or bi-weekly, the Event Day field is enabled.*

4. If the **Event Day** field is enabled, type the corresponding day of the week (2-6) or day of the month (1-31).

5. In the **Next Proj Date** field, type the next date this scheduled event is expected to occur.

6. In the **Nbr of Occurrences** field, type number of times this scheduled event will occur.

7. To generate a discrepancy if the event has not occurred by the time of estimate generation, select the **Discrepancy** check box.

8. If the event is a document, on the **Required Doc Type** dropdown list, click the required document type.

9. If the required document is expected from an external source, select the **External Indicator** check box.

-or-

10. Press the **Tab** key.

11. In the **Message Text** field, type a short message that is sent to the Distribution List or Recipient when the scheduled event Actual Date is not completed by the Next Projected Date.

12. **Save**.

To schedule 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 type.

3. In the **Projected Date** field, type the date the key date event is expected to be completed.

4. If this Key Date is to be part of the Contract finalization process, click the **Required to Finalize** check box (ON).

-or-

   In the **Message** field, type a short notice that will be sent to the Distribution List or Recipient when the Actual Date is entered.

5. **Save**.

To delete 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 type.

3. On the toolbar, click **Delete**.

4. In the message, click **Yes**.

5. **Save**.

To start a milestone:

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

2. In the **Contract ID** column, scroll to and double-click the desired contract. The system displays the Milestones window for the selected contract.

3. In the upper pane, scroll to and double click the milestone.

4. In the lower pane, in the **Work Start** field, type the date the milestone work began.

5. **Save**.

Review Exercise

In this exercise, perform contract initialization activities.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN350**		

1. Navigate to the **Contract Records** panel.

2. Navigate to the Key Dates window and enter the following for contract **TRN349**:

   - For **Starting Notice Date Type**, enter a projected date of **05/01/14**.

   - For **Starting Notice Date Type**, enter an actual date of **05/17/14**.

   - For the **Recipient**, search and select **jj00002 Nopps, Jamie**.

3. Navigate to the Checklist Scheduled Events window for contract **TRN349**.

   - Select the **DBE Signed Subcontract(s)**.

   - Select **Milestone No. 03.**

   - Enter **05/18/14** as the **Next Projected Date**.

   - For the **Recipient**, search and select **jj00002 Nopps, Jamie**.

4. Open the Milestones window and enter the following for contract **TRN349**:

   - For **Milestone 03**, enter a **Start Date** of **06/20/14**.

   - For **Milestone 06**, enter a **Start Date** of **06/01/14**.

5. **Save**.

6. **Exit SiteManager**.

Maintaining Contracts for Office Documentation

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

Recording Actual Dates of Checklist Events

Use the Checklist Event Dates window to display the list of repetitive scheduled events for a selected contract. Use the lower pane to view the chronological history of each occurrence of the selected event and record the actual date for each occurrence.

Figure 1. Checklist Event Dates Window

Maintaining Contracts for Office Documentation

Exercise 1

In this exercise, navigate to the Checklist Event Dates window and record actual dates.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		

1. Start and log onto SiteManager as user **jj00002** *while connected in server mode*.

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

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** area, in the **Contract ID** column, scroll to and double-click **TRN350**. The system displays the Checklist Event Dates window.

Provide an actual date for an event.

6. In the **Event Type** column, scroll to and click **Contractor's Employee Interview**.

7. In the lower pane, click in the **Actual Date** field for projected date **08/01/14**, type **080114**.

8. **Save**.

Provide an actual date for another event.

9. In the upper pane, in the **Event Type** column, scroll to and click **Prompt Payment to Subcontractors**.

10. In the lower pane, click in the **Actual Date** field for projected date **07/01/14**, type **070214**.

11. **Save**.

12. **Close**.

You've recorded actual dates of checklist scheduled events.

> WARNING!
>
> IF PROJECTED DATE MODIFIED, RECORD MAY NOT BE SAVED.

Adding Stockpiled Materials

Use the Stockpiled Materials window to select materials to be stockpiled for the contract and enter invoice data for the materials. This window displays contract line item data in the upper pane and stockpiled material data in the lower pane. The system uses this information during estimate generation to determine the amount to be paid for the items installed. The estimate process enters the installed quantity and the amount paid to date on the Stockpiled Materials window. The estimate process also closes out the stockpiled material balance when the remaining quantity is zero, or the user can close out the balance manually.

Figure 2. Stockpiled Materials Window

Preparing to Add Stockpiles

SiteManager calculates payments for Stockpiled Materials based on the quantity of Material used per Contract Item. SiteManager does not automatically apply portions of the invoiced Material quantity and payment amount to different Contract Items. This means that the user must decide how to allocate the invoiced amounts for a Stockpiled Material. Before adding invoice data to SiteManager, the user must determine the following:

- Which contract items include the invoiced material?

- How much of the total invoiced material to allocate to each contract item?

- How many units of material are included in one unit of the pay item (the conversion factor)?

From these numbers, the user can calculate the values to enter in the fields of the Stockpiled Materials panel.

Maintaining Contracts for Office Documentation

IT IS IMPORTANT TO INCLUDE THE ITEM NUMBER AND ITEM DESCRIPTION IN THE STOCKPILED MATERIAL DESCRIPTION FIELD. THIS WILL MAKE IT EASIER TO IDENTIFY THE STOCKPILE LATER.

SEE APPROPRIATE SPECIFICATION AND/OR CIRCULAR LETTER FOR DETERMINING UNIT PRICE AND INITIAL INVOICE PAYMENT. THE INITIAL INVOICE PAYMENT FIELD SHOULD ALWAYS MATCH THE INVOICE AMOUNT FIELD WHICH IS AUTOMATICALLY CALCULATED AND IS THE AMOUNT THAT WILL BE PAID FOR THE STOCKPILE ON THE NEXT ESTIMATE.

EACH INVOICE MUST BE ADDED INDIVIDUALLY AND ON THE CORRECT PROJECT NUMBER AND LINE ITEM NUMBER. WHEN AN INITIAL STOCKPILE MATERIAL PAYMENT CONSISTS OF MULTIPLE INVOICES THE FIRST INVOICE IS ENTERED UNDER THE "NEW" OPTION AND THE REMAINING INVOICES, AND ANY ADDITIONAL INVOICES RECEIVED, FOR THAT SAME MATERIAL ARE ENTERED AS "REPLENISHES" TO THE INITIAL STOCKPILE.

STOCKPILED MATERIAL REDUCTIONS OR ADDITIONS ARE CALCULATED AND APPLIED AUTOMATICALLY DURING THE ESTIMATE PROCESS IN SITEMANAGER. USE THE LINE ITEM ADJUSTMENT WINDOW AND THE BOE REPORT, *STOCKPILE*, TO VIEW THE DETAILS.

NOTE: THE PROPER CONVERSION FACTOR IS VERY IMPORTANT. IF THE CONVERSION FACTOR IS SOMETHING OTHER THAN ONE AND YOU NEED ASSISTANCE DETERMINING HOW MANY UNITS OF MATERIAL ARE IN ONE UNIT OF PAY ITEM, CONTACT YOUR REGIONAL SUPPORT.

Exercise 2

In this exercise, learn to create a stockpiled material record.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD - Operations Office Staff [OSTAFF]**		
Keys	**TRN350**		

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

Choose the keys.

2. On the **Services** menu, click the **Choose Keys** choice. The system displays the Stockpiled Material Select window.

3. In the **Contract Projects** area, in the **PCN** column, double-click **67004-3213-14**.

4. In the **Contract Items** area, to sort the records, click the **Item Code** column heading.

5. In the **Item Code** column, scroll to and double-click **604-03.02** for line number **2600** and category number **0500**. The system displays a new record for item **STEEL BAR REINFORCEMENT (BRIDGES)**.

Create the stockpiled material record.

6. In the **Stockpiled Desc** field, type **604-03.02 Steel Bar Reinforcement, Bridge**.

7. In the **Invoice Date** field, type **10/12/14**.

8. In the **Invoice Number** field, type **90587757**.

9. In the **Quantity** field, type **33092.000**.

10. Click the **Units** dropdown list and on the keyboard press **p**.

11. Click the **Pound** choice.

12. In the **Unit Price** field, type **.38644**.

13. In the **Conv Factor** field, type **1.0**.

14. What is the system-calculated invoice amount? _____

15. In the Initial **Invoice Payment** field, type **12,788.07**.

16. **Save**.

> NOTE
>
> IT IS IMPORTANT THAT YOU INCLUDE THE ITEM NUMBER AND ITEM DESCRIPTION IN THE STOCKPILED DESCRIPTION FIELD. THIS WILL MAKE IT EASIER TO IDENTIFY THE STOCKPILE.

> NOTE
>
> THE INITIAL INVOICE PAYMENT SHOULD EQUAL THE TOTAL INVOICE AMOUNT.

You've created a stockpiled material record.

Replenishing Stockpiles

The Stockpiled Materials window also allows you to add to an existing stockpile by replenishing it. After opening the existing stockpile, you use the Services menu's Replenish Stockpile choice to add to the existing stockpile. The menu selection only blanks out the Quantity field, so care should be taken to modify the other fields appropriately, particularly the Initial Invoice Payment field because this is the value that is paid on the next estimate.
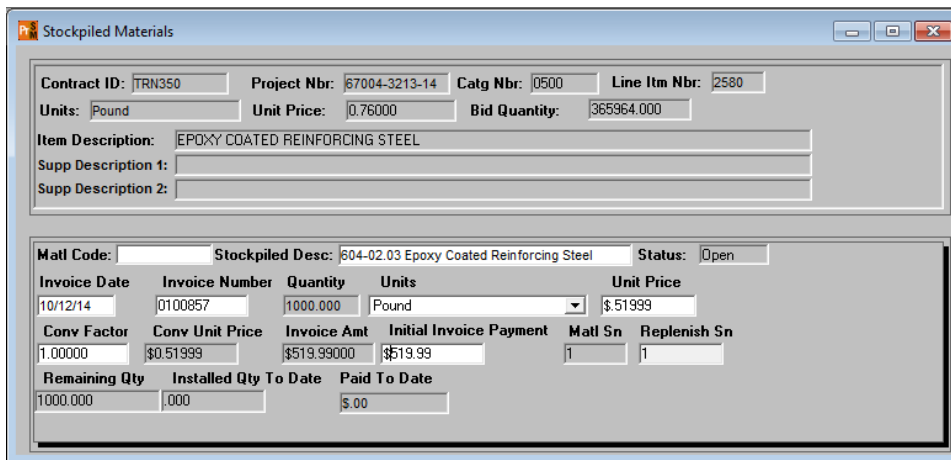
Figure 3. Stockpiled Materials Window

Exercise 3

In this exercise, learn to replenish stockpiled material.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD - Operations Office Staff [OSTAFF]**		
Keys	**TRN350**		

Open an existing record.

1. On the toolbar, click the **Open** button. The system displays the Stockpiled Material Select window.

2. **Note:** By including the item number and item description in the Stockpiled Description field it is easy to identify the correct stockpile from the Material Description column.

3. In the **Stockpiled Materials** area, in the **Material Description** column, scroll to and double-click **604-02.03 Epoxy Coated Reinforcing Steel** for project number 67004-3213-14, category number 0500, line item 2580, invoice number 0100823 entered on 09/02/15. SiteManager displays the Stockpiled Materials window.

Replenish the stockpile.

4. From the **Services** menu, click **Replenish Material**.

5. In the **Invoice Date** field, type **101214**.

6. In the **Invoice Number** field, type **0100857**.

7. In the **Quantity** field, type **1000**.

8. In the **Unit Price** field, type **.51999**.

9. In the **Initial Invoice Payment** field, type **519.99**.

10. **Save**.

You've replenished a stockpiled material.

> NOTE
>
> THE INITIAL INVOICE PAYMENT SHOULD EQUAL THE TOTAL INVOICE AMOUNT.

Closing Out Stockpile Balances

Use the Stockpiled Materials window to close an existing stockpile. After opening the existing stockpile, you use the Services menu's Close Out Balance choice to remove remaining quantity in the existing stockpile. The system will create a deduction on the next estimate for the remaining quantity times the unit price of the material that remained in the stockpile prior to closing it out.

Figure 4. Stockpiled Materials Window

Exercise 4

In this exercise, learn to close out a stockpiled material balance.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD - Operations Office Staff [OSTAFF]**		
Keys	**TRN350**		

Open an existing record.

1. On the toolbar, click the **Open** button. The system displays the Stockpiled Material Select window.

2. In the **Stockpiled Materials** area, in the **Material Description** column, scroll to and double-click **730-15.31 Cabinet 4-Phase Base Mounted** for project number 67004-3213-14, category number 0100, line item 1860, invoice number 01000710 entered on 08/20/15. SiteManager displays the Stockpiled Materials window.

Close out the balance.

3. On the **Services** menu, click **Close Out Balance**.

4. **Save**.

5. **Close**. The system displays the SiteManager Panel window.

6. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've closed out a stockpiled material balance.

Entering a Materials Sample Record for T2 Certifications

Use the Maintain Sample Information window to create a materials sample record for items requiring T2 certifications. The estimate generation process uses this data to determine the amount to be paid for items installed.

Figure 5. T2 Example (Page 1 of 2)

Basic Sample Data Panel

It is important to include the following when recording data for T2 certifications:

- **Sample Date** - T2 Date Sampled

- **Smpl Type** - Certification

- **Acpt Meth** - Certification

- **Material** - Material Code

- **Sampler** - jj# for the person whose signature is shown on the paper T2 in the Accepted By field
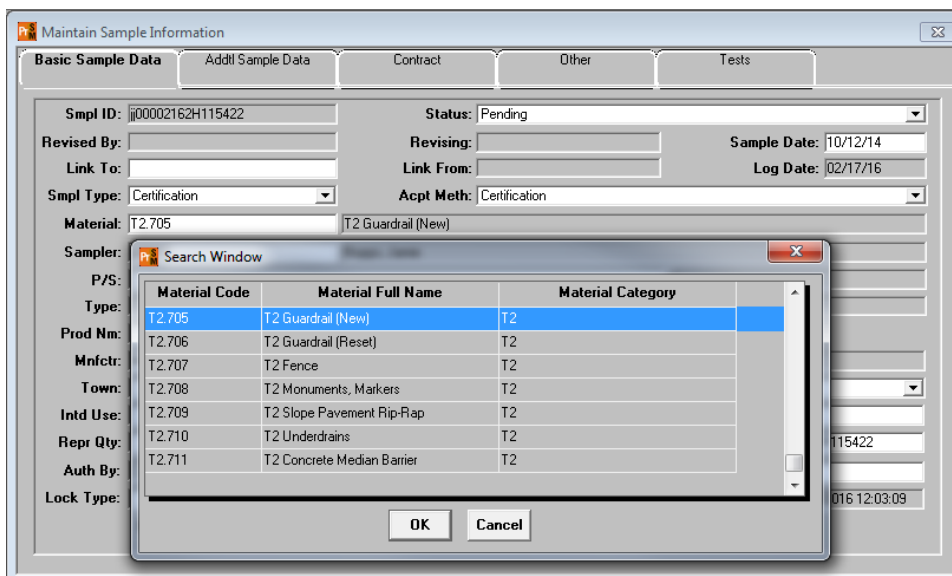
Figure 6. Maintain Sample Information Window – Basic Sample Date Panel – Material Field - Search Window

---

EXAMPLE 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.

NOTE: THE MATERIAL FULL NAME MUST BE USED TO DETERMINE THE CORRECT MATERIAL CODE.

Contract Panel

Select the contract ID, the item code(s) and record the Represented Qty from the T2 for each item selected. Items with a common material code can be recorded on the same sample record.

Figure 7. Maintain Sample Information Window - Contract Panel

Other Panel

Select DEST - TDOT T2 Certification from the Type dropdown list and record the T2 subcontractor performing the work.

Figure 8. Maintain Sample Information Window – Other Panel

Click the Open Assign Tests button on the toolbar to view the assigned test and click the Accept Default Tests button.

Figure 9. Maintain Sample Information Window – Other Panel – Open Assign Tests Button (detail)
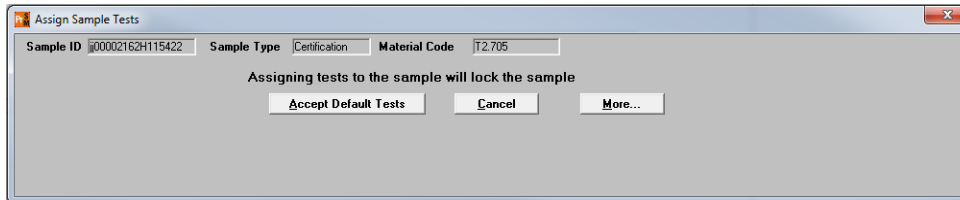
Figure 10. Maintain Sample Information Window – Other Panel – Assign Sample Tests Window

The system will automatically complete sample records for T2 items after users click the Accept Default Tests button.

      Exercise 5

In this exercise, create a sample record with multiple 705 items.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD - Operations Office Staff [OSTAFF]**		
Keys	**TRN350**		

1. On the **Main Panel** panel, double-click the **Materials Management** icon. The system displays the Materials Management panel.

2. Double-click the **Sampling and Testing** icon. The system displays the Sampling and Testing panel.

3. Double-click the **Sample Information** icon. The system displays the Maintain Sample Information window.

Record the T2 date sampled.

4. In the **Sample Date** field, type **101214**.

Record the sample ID from the electronic T2 onto the paper T2.

5. What is the sample ID? _____

Record the appropriate sample type and acceptance method.

6. On the **Smpl Type** dropdown list, select **Certification**.

7. On the **Acpt Meth** dropdown list, select **Certification.**

Record the material sampled.

8. In the **Material** field, type **T2**.

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 **T2.705**.

Record the inspector's or project supervisor's jj#.

12. In the **Sampler** field, type **jj00001**.

Record the manufacturer.

13. In the **Mnfctr** field, right-click and select the **Search** choice. SiteManager displays the Search Window window.

14. To sort the list, click the **Producer Supplier Name** column heading.

15. In the **Producer Supplier Name** column, scroll to and double-click **Multiple\Unlisted Mnfctrs**. The system populates the Mnfctr field.

Record additional sample data.

16. Click the **Addtl Sample Data** tab. The system displays the Addtl Sample Data panel.

17. Select the **Buy American** check box.

18. In the **Buy American** dropdown list, select **Certified Mill Test Report**.

19. **Save**.

NOTE
VERIFY THAT BUY AMERICAN REQUIREMENTS HAVE BEEN MET PER SP106A.

Select the items represented on the paper T2.

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 in the **Contract ID** field. The system displays the Search Window window.

23. From the object menu, select the **Search** choice.

24. In the **Contract ID** column, double-click **TRN350**. The system displays information about the associated items.

25. On the keyboard, press and hold the **Ctrl** key.

26. In the **Item Code** column, select **705-01.01**, **705-02.02**, **705-04.03** and **705.04.04**.

27. Release the **Ctrl** key.

28. Click **OK**. The system closes the Select Contract/Material Information window and displays the selected items in the Contract panel.

Record the quantity for the items represented on the paper T2.

29. In the **Item Code** column, select **705-01.01**.

30. In the **Represented Qty** field for the selected item, type **162**.

31. In the **Item Code** column, select **705-02.02**.

32. In the **Represented Qty** field for the selected item, type **3200**.

33. In the **Item Code** column, select **705-04.03**.

34. In the **Represented Qty** field for the selected item, type **2**.

35. In the **Item Code** column, select **705-04.04**.

36. In the **Represented Qty** field for the selected item, type **2**.

37. **Save**.

Assign the destination lab.

38. Click the **Other** tab. The system displays the Other panel.

39. On the keyboard, press the **space bar**. The system displays Destination Lab in the Type field.

40. Using the right mouse button, click on the **ID** field.

41. From the object menu, select the **Search** choice. The system displays the Search Window window.

42. In the **Destination Lab** column, double-click **DEST – TDOT T2 Certification**. The system closes the Search Window window.

43. **Save**.

Record the T2 subcontractor.

44. On the toolbar, click the **New** button.

45. In the **Type** dropdown list, select **T2 Subcontractor**.

46. Using the right mouse button, click on the **ID** field.

47. From the object menu, select the **Search** choice. The system displays the Search Window window.

48. In the **Vendor Full Name** column, scroll to and double-click **REYNOLDS FENCE AND GUARDRAIL, INC**.

49. **Save**.

Submit the T2 for auto-finalization.

50. On the toolbar, click the **Open Assign Tests** button. SiteManager displays the Assign Sample Tests window.

    Note: Although a T2 item does not require a test, SiteManager requires this step to use SiteManager LIMS.

51. Click the **Accept Default Tests** button. The system closes the Assign Sample Tests window, changes the Maintain Sample Information window's sample status to Completed to authorize the sample, and makes all fields inquiry-only.

    Note: In Training, there is no customization to change the sample status to Completed.

Prepare for the next exercise.

52. **Close**. The system displays the SiteManager Panel window.

53. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've created and submitted a T2.

SEND TWO COPIES OF THE PAPER T2 ALONG WITH THE RELATED MATERIAL CERTIFICATIONS TO REGIONAL M&T.

Summary

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 **Checklist Event Dates** list box, scroll to and click the desired checklist event.

3. In the **Actual Date** field, type the date that the event occurred.

4. In the **Comments** field, type comments to add to the record.

5. **Save**.

To add a stockpiled material:

1. On the **Contract Records** panel, double-click the **Stockpiled Materials** icon.

2. Click the **Services** menu, and click **Choose Keys**.

3. In the **Contract ID** list, scroll to and double-click a contract.

4. In the **PCN** list, scroll to and double-click a project number.

5. In the **Contract Items** list, scroll to and double-click an item.

6. In the **Stockpiled Desc** field, type the description.

7. In the **Invoice Date** field, type the date.

8. In the **Invoice Number** field, type the invoice number.

9. In the **Quantity** field, type the quantity.

10. In the **Units** dropdown list, select the appropriate unit.

11. In the **Units Price** field, type the unit price.

12. In the **Conv Factor** field, type the conversion factor.

13. In the **Initial Invoice Payment** field, type the initial invoice payment amount.

14. **Save**.

To replenish a stockpiled material:

1. On the **Contract Records** panel, double-click the **Stockpiled Materials** icon. The Stockpiled Materials window opens.

2. Click the **Open** button.

3. In the **Contract ID** list box, scroll to and double-click the desired contract.

4. In the **Stockpile Materials** list box, scroll to and double-click the correct stockpile.

5. Click the **Services** menu and click the **Replenish Material** choice.

6. Click **OK**.

7. In the **Quantity** field, type a previously determined quantity of the stockpiled material to be applied to this item and this contract.

8. Change the other fields as appropriate.

9. In the **Initial Invoice Payment** field, type the previously determined dollar amount of the initial payment to be applied to this item and this contract.

10. **Save**.

To close out the balance of a stockpiled material:

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

2. Click the **Open** button.

3. In the **Contract ID** list box, scroll to and double-click the desired contract.

4. In the **Stockpile Materials** list box, scroll to and double-click the correct stockpile.

5. Click the **Services** menu and click the **Close Out Balance** choice.

6. **Save**.

Review Exercise

In this exercise, demonstrate contract maintenance activities.

User ID	**jj00002**	Password	**pass**
Connection	**Server**		
Group Name	**FIELD - Operations Office Staff [OSTAFF]**		
Keys	**TRN350**		

1. Navigate to the **Checklist Event Dates** window.

2. Record **07/15/14** as the actual date for the **Contractor ESHP Cert. – CL 107.01-01** checklist event type projected for **07/15/14** on contract **TRN350**.

3. Navigate to the Stockpiled Materials window

4. Open the stockpiles for contract **TRN350**.

5. Open material **730-02.09 Signal Head Assembly 130 w\bp** for line item number **1680**.

6. Replenish the stockpile using the following invoice information:

    Invoice date: **10/12/14**
    Invoice Number: **52789**
    Quantity: **10 Each**
    Unit Price: **453.87421**

7. Change the **Initial Invoice Amount** to match the auto-calculated value rounded to two decimal places.

8. **Exit SiteManager**.

You've demonstrated contract maintenance activities.

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

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

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.

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

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.

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

> BE SURE TO CHANGE TO STANDALONE.

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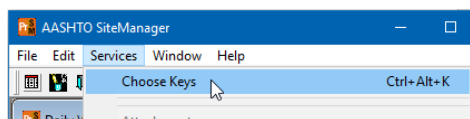
Figure 2. Daily Work Reports Window – Services Menu – Choose Keys (Detail)

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.
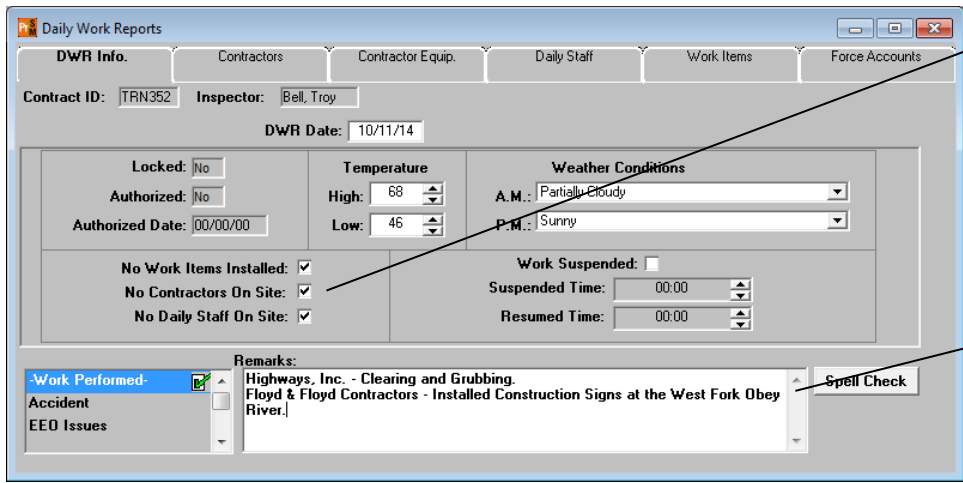
Figure 3. Daily Work Reports Window - DWR Info Panel

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.

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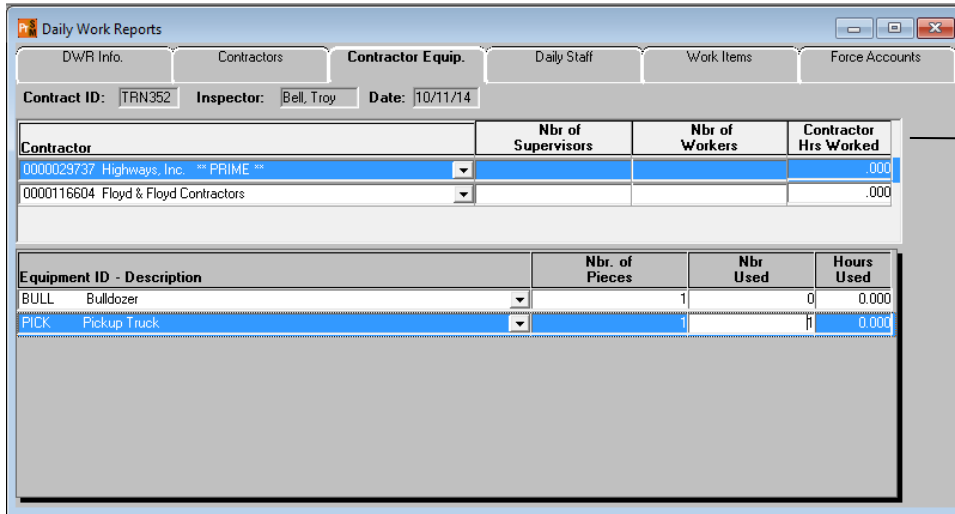
Maintain the Personnel Type Master List for each contractor. The HQ Construction Office maintains the Vendor Master Lists, while the Field Office maintains the Contract Master List.

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.

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 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.

Figure 6. Daily Work Reports Window - Daily Staff Panel

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
	67004-3213-14	0010	0010	0100	ROADWAY	105-01	CONSTRUCTION STAKES, LINES AI
	67004-3213-14	0020	0020	0100	ROADWAY	109-10.01	TRAINEE
	67004-3213-14	0030	0030	0100	ROADWAY	201-01	CLEARING AND GRUBBING
	67004-3213-14	0040	0040	0100	ROADWAY	202-01	REMOVAL OF STRUCTURES AND C
	67004-3213-14	0050	0050	0100	ROADWAY	202-02.01	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0060	0060	0100	ROADWAY	202-02.02	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0070	0070	0100	ROADWAY	202-02.03	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0080	0080	0100	ROADWAY	202-02.04	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0090	0090	0100	ROADWAY	202-02.05	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0100	0100	0100	ROADWAY	202-02.06	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0110	0110	0100	ROADWAY	202-02.07	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0120	0120	0100	ROADWAY	202-02.08	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0130	0130	0100	ROADWAY	202-02.09	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0140	0140	0100	ROADWAY	202-02.10	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0150	0150	0100	ROADWAY	202-02.11	REMOVAL OF PIPE (SIZE ,STA.)
	67004-3213-14	0160	0160	0100	ROADWAY	202-02.12	REMOVAL OF PIPE (SIZE ,STA.)
	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.

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.
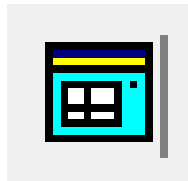
Figure 10. DWR Template Button

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.
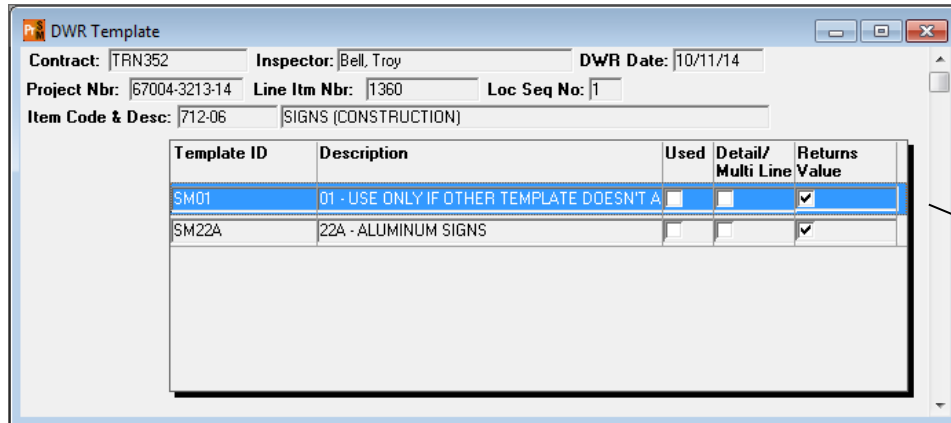
Figure 11. DWR Template Window

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:

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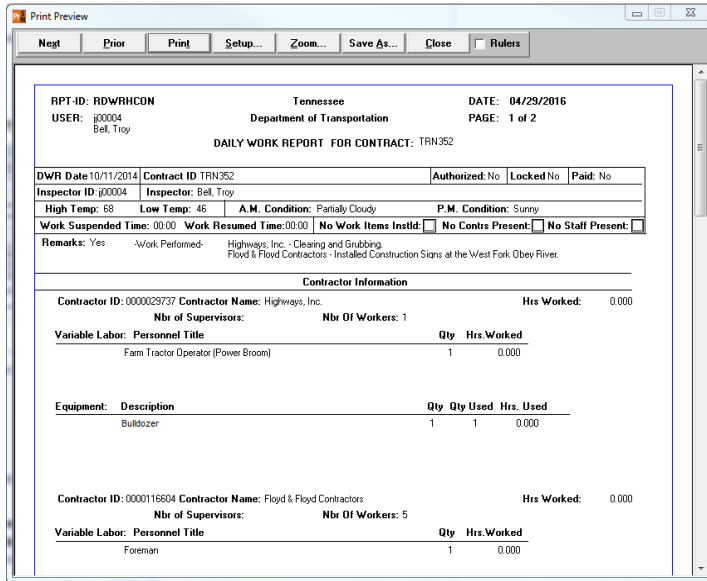
Figure 16. Print Preview Window (after clicking Preview DWR button)

 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:
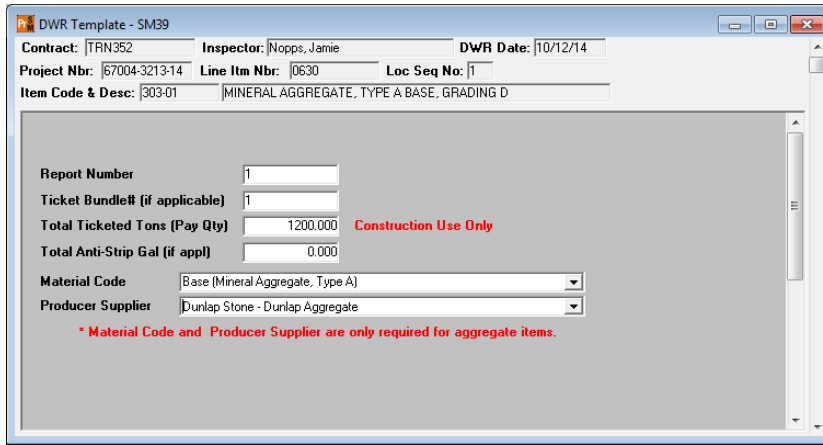
    Project Nbr **67004-3213-14**, Line Item Number **0630**, Category Number **0100**, Item Code **303-01**, Description **MINERAL AGGREGATE, TYPE A BASE, GRADING D**.

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 **Templt 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

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.
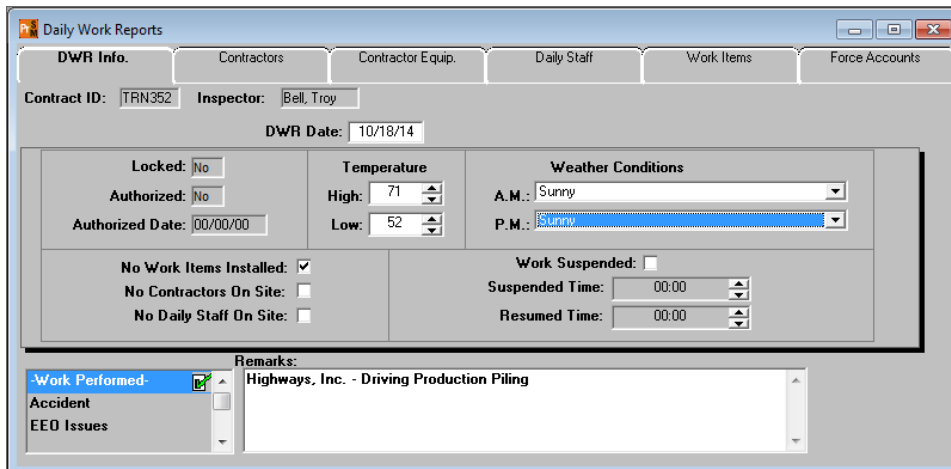
Figure 1. Daily Work Reports Window - DWR Info Panel

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.

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.

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.

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.

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

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**.

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**.

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

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*.
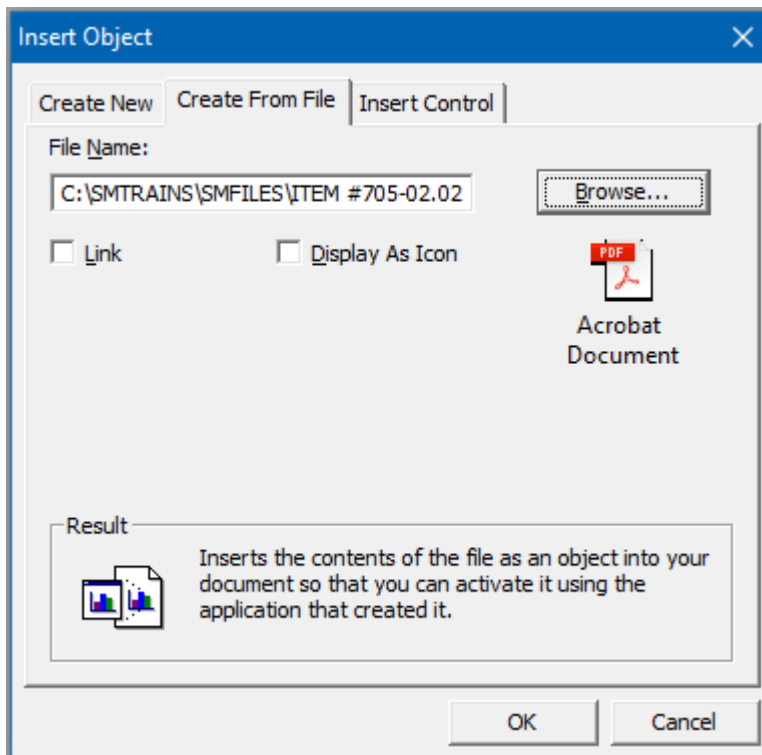
Figure 8. Insert Object Dialog Invoked by the New OLE button
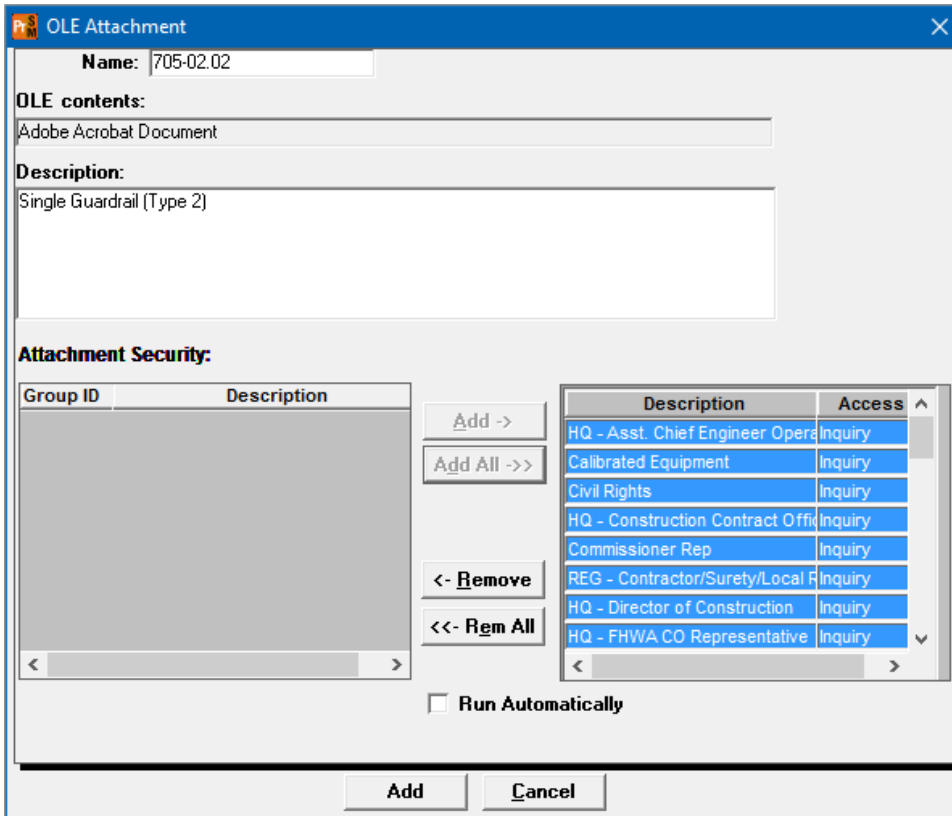
Figure 9. OLE Attachment Window

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.
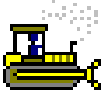
Exercise 6

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.

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

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.

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

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.

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.

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

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.
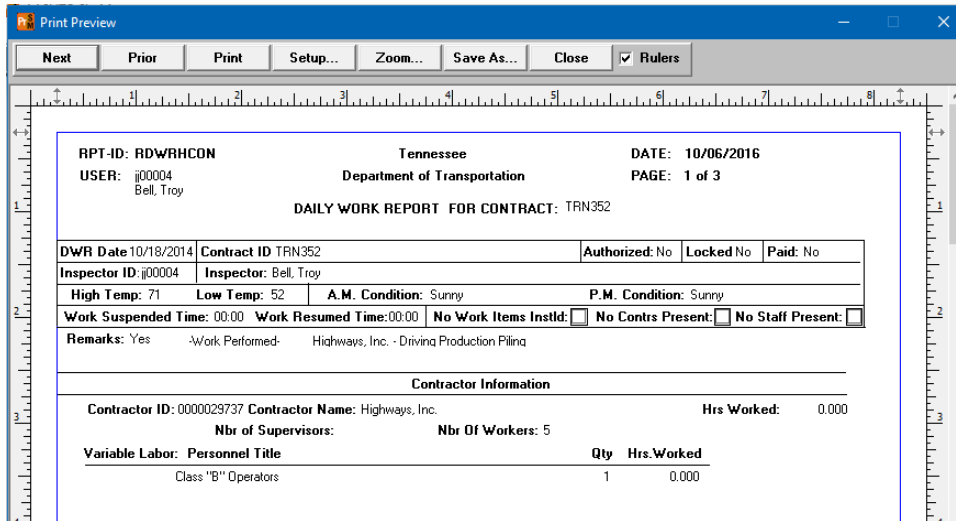
Figure 11. Print Preview Window

     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 t**o 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**.

Creating and Viewing Diaries
for Field and Office Documentation

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

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
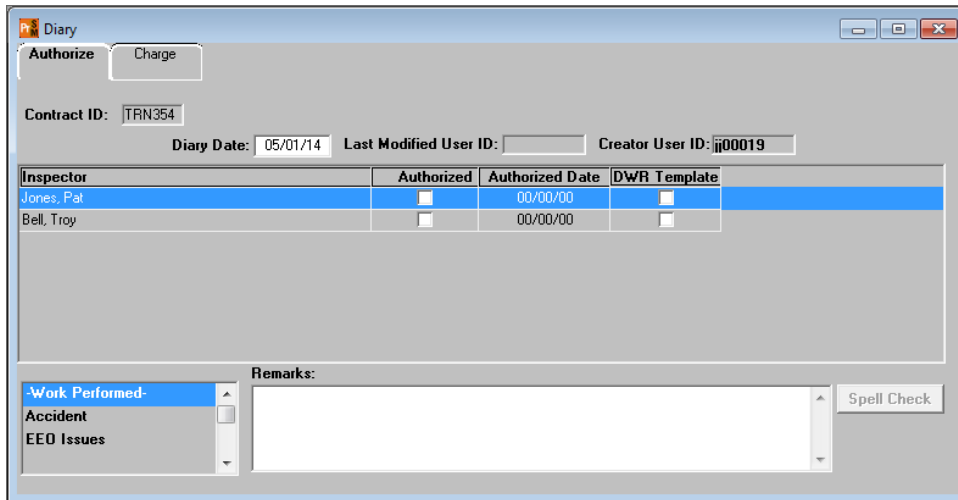
Figure 1. Diary Window - Authorize Panel

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.

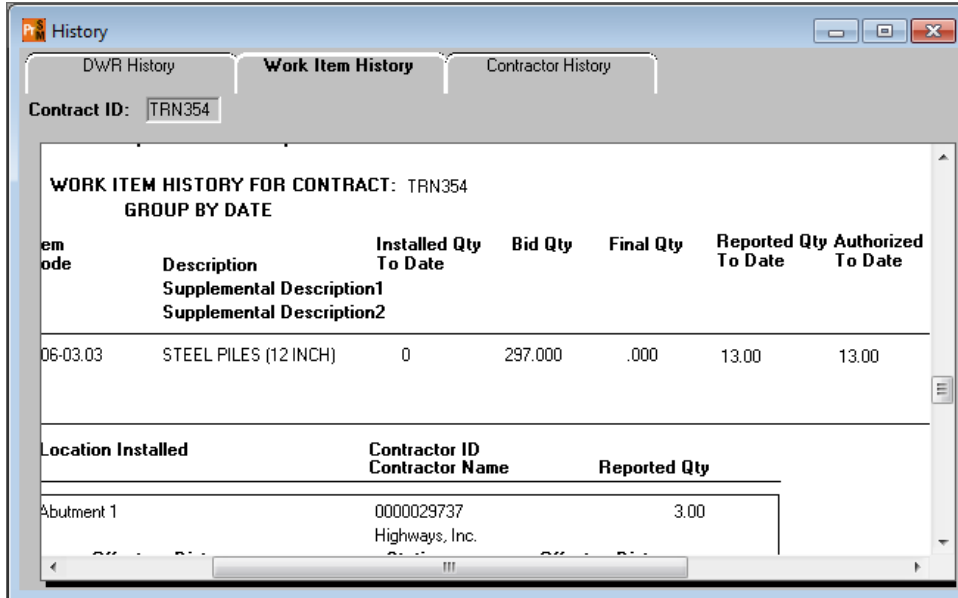|			
User ID	**jj00019**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD - District Operations Supervisor [PJSUPS]**		

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.

   SHIFT-TAB IF USER ID NOT HIGHLIGHTED.

3. Double-click the **Diary** icon.

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.
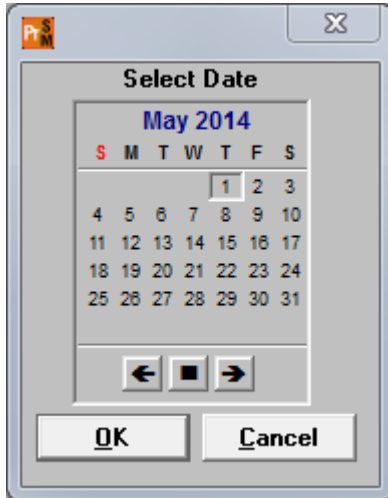
Figure 2. Calendar

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**.

HAVE STUDENTS TYPE THE DATE.

4. Press the **Enter** key. The system displays the list of DWRs submitted for the current date.

5. **Save**.

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

UNDER THE REPORT LINE AFTER THE DWR INFORMATION, THE DWR TEMPLATE DATA IS LISTED.

Figure 4. DWR Template Report (page with template information)

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.

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.

Figure 7. Unauthorized DWR Report - Parameters

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.
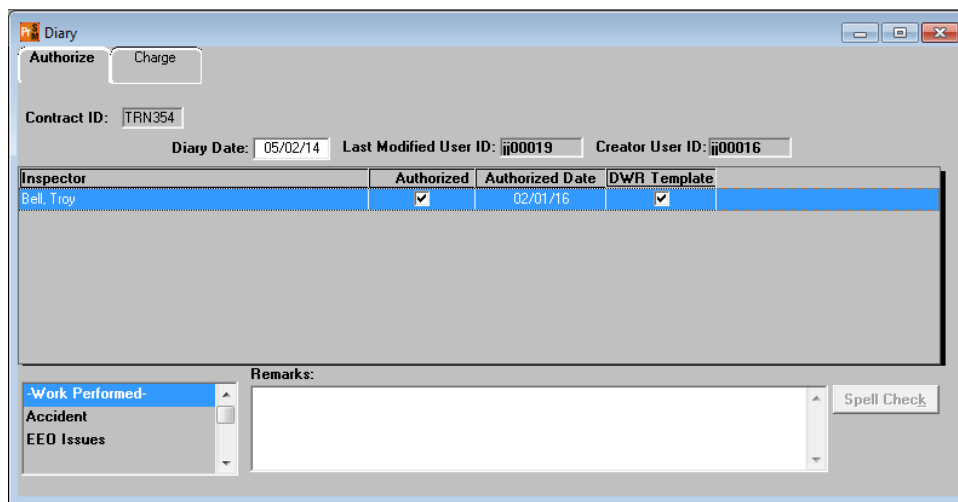
Figure 9. Diary Window with Authorized DWRs

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

<div style="border:1px solid;">REPORTS ARE SORTED BY DWR "DATES" ONLY.</div>

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.
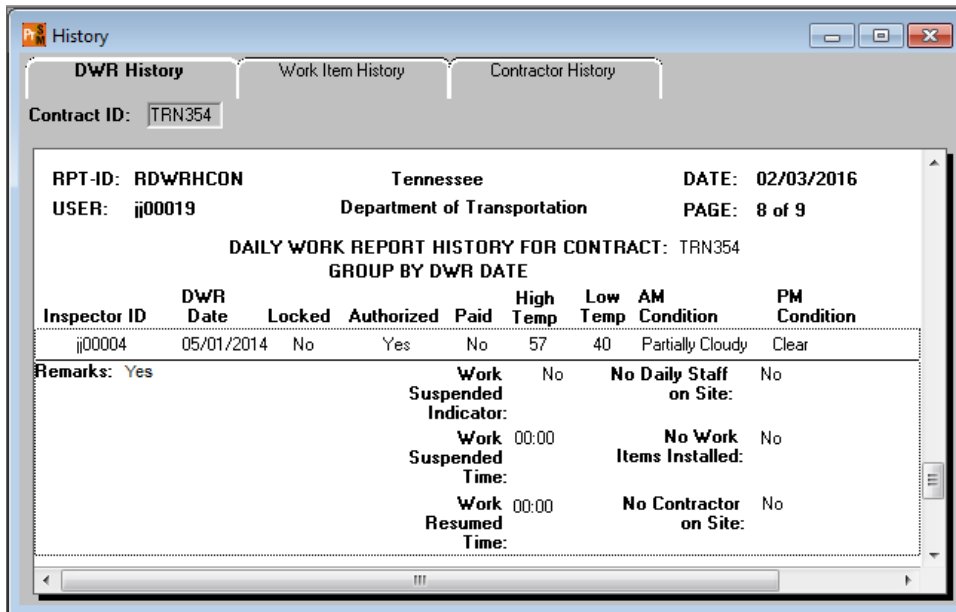
Figure 10. History Window - DWR History Panel

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.

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:
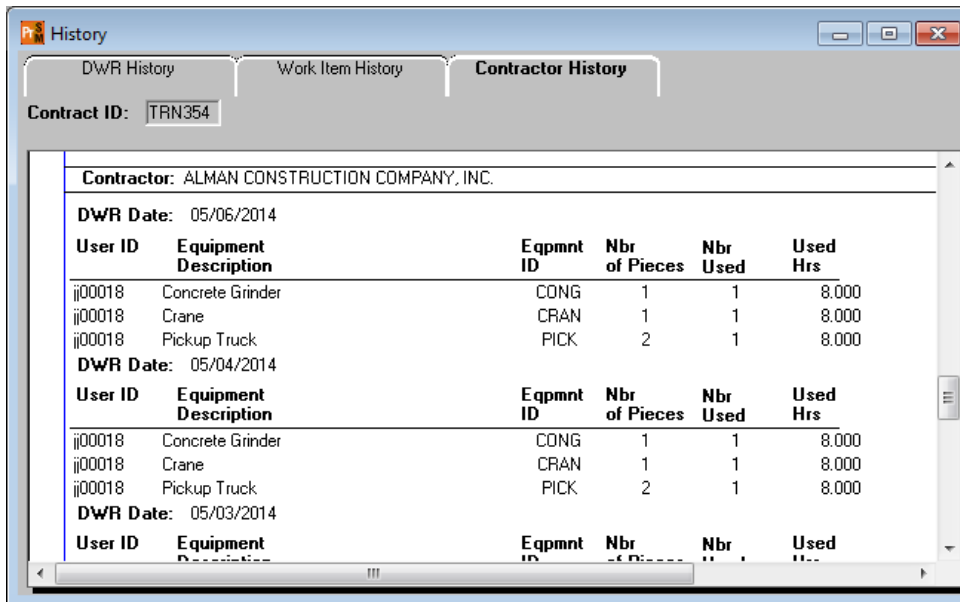
- Equipment History

- 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

Figure 13. History Window – Contractor History Panel - Equipment History Report

Supervisor History Report
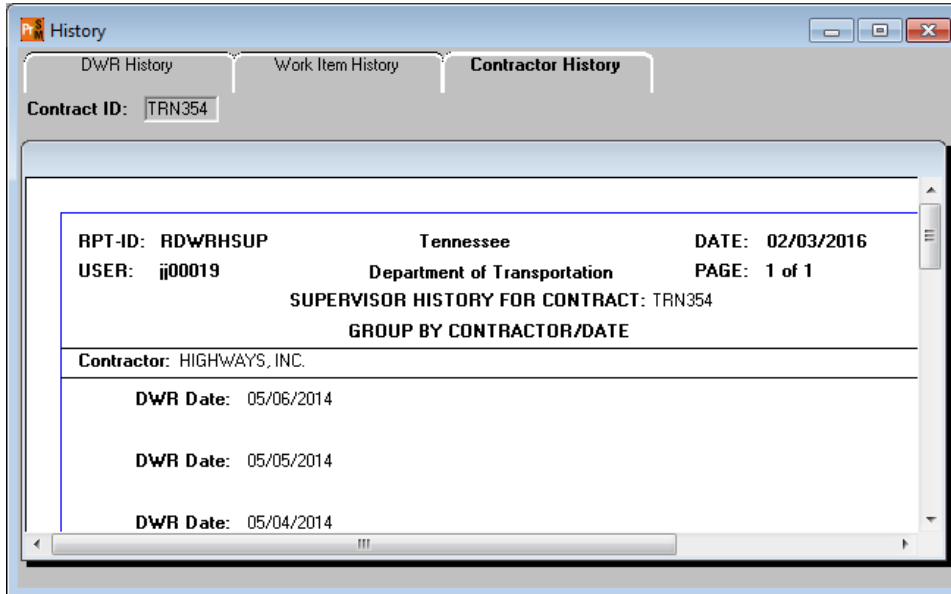
Figure 14. History Window – Contractor History Panel - Supervisor History Report

Variable Labor History Report
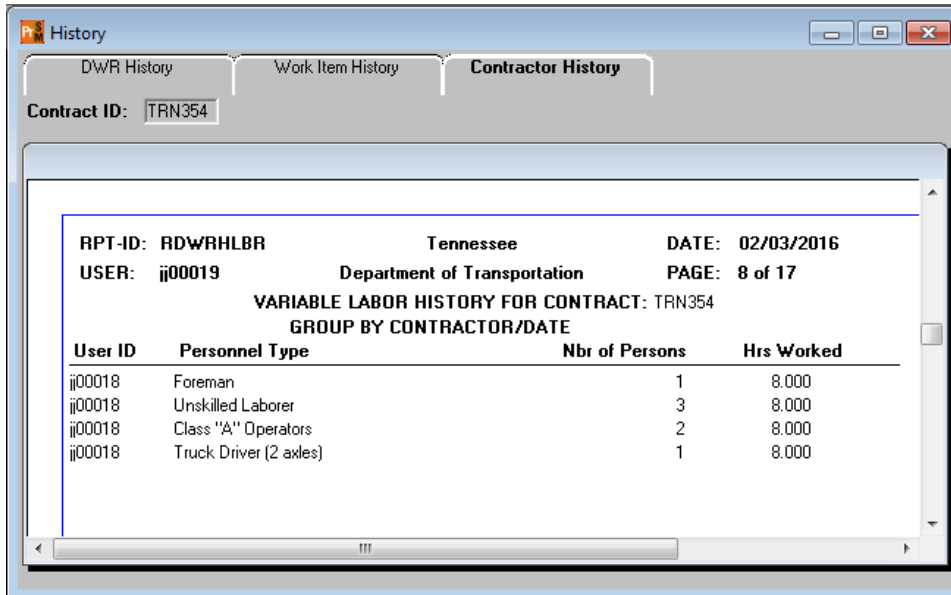
Figure 15. History Window – Contractor History Panel – Variable Labor History Report

 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 Estimates Basics and Progress Estimates for Office Documentation

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

TDOT SiteManager Contracts (Test Reports Plugin Contracts)	TDOT SiteManager Contracts (Automatic Material Discrepancies)
DWR and Diaries	DWR and Diaries
Generate Estimate	Generate Estimate
Verify Estimate and Discrepancies	Verify Estimate and Discrepancies (RR069)
--	Generate Estimate again, if needed
--	Verify Estimate and remaining discrepancies
Override Discrepancies	Override Discrepancies
Run Test Report Program	--
Run Price Adjustment Program	Run Price Adjustment Program

Understanding Estimates in SiteManager

The Estimate Generation process manages the estimate functionality from the generation of an estimate through the creation of the extract file for TDOT's financial system. Functionality involves the following:

- Generating the estimate

- Reviewing estimate information

- Resolving estimate discrepancies

- Reviewing estimate item details

- Approving the estimate

- Tracking estimate status
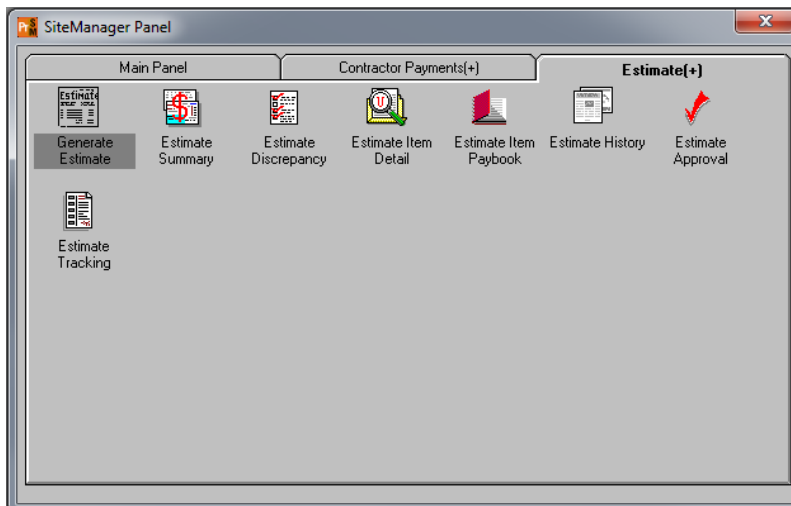
Figure 1. SiteManager Panel Window - Estimate Panel

TDOT Progress Estimate Generation Workflow

Inspection Staff

Inspection Staff complete the following pre-estimate planning and verification tasks prior to estimate generation:

Progress Estimate Planning and Verification Tasks	Functional Navigation
Lead Inspector/Inspector checks in (Pipeline) all DWRs to the server through the ending DWR date. Refer to chapter, "Pipelining Data from Standalone to Server."	Pipeline > PM to Server Pipeline
The Lead Inspector/Inspector will run the BOE report, *DWR Template,* to verify installed quantities are correct and the BOE report, *Contract Materials Sampling Summary,* 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 BOE report, *DWR Template*.	Accessories > System Attachments > SM Reports (BOE reports)
Lead Inspector runs the BOE report, *Unauthorized DWR,* to find the applicable unauthorized DWRs.	Accessories > System Attachments > SM Reports (BOE reports)
As needed, Lead Inspector runs and reviews the BOE report, *DWR Template,* to help determine which unauthorized DWRs to authorize for the estimate. Lead inspector may also need to review the DWRs and other reports to help with this determination.	Accessories > System Attachments > SM Reports (BOE reports)
As needed, Lead Inspector creates any missing diaries for the estimate period and authorizes all applicable DWRs to date not previously authorized. 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 1. TDOT Progress Estimate Generation Workflow – Inspection Staff

Office Staff

Office Staff complete the following pre-estimate planning and verification tasks prior to estimate generation:

Progress Estimate Planning and Verification Tasks	Functional Navigation
Create DWRs for office recorded work items such as mobilization and ticketed items.	Daily Work Reports > Daily Work Reports
Use the Diary window to authorize DWRs created by Office Staff.	Daily Work Reports > Diary
Run the BOE report, *Unauthorized DWR,* to find the applicable unauthorized DWRs. If the report displays unauthorized Inspector DWRs, contact the Lead Inspector / District Supervisor. All applicable DWRs for the estimate period must be authorized prior to generating an estimate.	Accessories > System Attachments > SM Reports (BOE reports)
As needed, run and review the BOE report, *DWR Template,* to help determine which unauthorized DWRs to authorize for the estimate and run the BOE report, *Contract Materials Sampling Summary,* to review sampling and testing data entered. Perhaps, review DWRs and other reports to help with this determination.	Accessories > System Attachments > SM Reports (BOE reports)
Create any missing diaries for the estimate period and authorize all applicable Office Staff created DWRs to date. Office Staff should not authorize Inspector DWRs. A Lead Inspector or District Supervisor should authorize DWRs.	Daily Work Report > Daily Work Reports or Diary

Table 2. TDOT Progress Estimate Planning and Verification Workflow – Office Staff

District Supervisor

When authorizing DWRs for lead inspectors and/or office staff, district supervisors will complete the following pre-estimate planning and verification tasks prior to estimate generation:

Progress Estimate Planning and Verification Tasks	Functional Navigation
Run the BOE report, *Unauthorized DWR,* to find the applicable DWRs not previously authorized by the Lead Inspector or Office Staff.	Accessories > System Attachments > SM Reports (BOE reports)
Run and review the BOE report, *DWR Template,* to help determine which unauthorized DWRs should be authorized for the estimate and run the BOE report, *Contract Materials Sampling Summary,* to review sampling and testing data entered. Perhaps, review the DWRs and other reports to help with this determination.	Accessories > System Attachments > SM Reports (BOE reports)
Create any missing diaries for the estimate period and authorize all applicable DWRs to date not previously authorized. Confirm that a diary has been 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
Notify Office Staff that all applicable DWRs have been reviewed and authorized and that the estimate is ready for generation.	External

Table 3. TDOT Progress Estimate Generation Workflow – District Supervisor

Office Staff

Office Staff complete the following tasks as part of the estimate generation and review process:

Progress Estimate Workflow Tasks	Functional Navigation
Generate the estimate. Generate the same estimate multiple times if corrections or adjustments are necessary.	Contractor Payments > Estimate > Generate Estimate
Review the BOE report, *Contract Materials Sampling Summary (RR069),* and view the Estimate Discrepancy window in SiteManager. Resolve any materials discrepancies. After resolving discrepancies, regenerate the estimate in the Generate Estimate window in SiteManager.	Accessories > System Attachments > SM Reports (BOE reports) and Contractor Payments > Estimate > Estimate Discrepancy and Contractor Payments > Estimate > Generate Estimate
View the Estimate Discrepancy window. Resolve any checklist events and materials discrepancies. Also, resolve all other discrepancies, if possible, and override with remarks those that cannot be resolved now.	Contractor Payments > Estimate > Estimate Discrepancy
Access the Adjustments plug-in and calculate all Fuel, Bituminous Material, AC Content, and Anti-Strip adjustments necessary for the estimate period. If applicable, resolve all Adjustment Calculation Messages before applying adjustments.	Contract Administration > Contract Records > Contract > Attachments > Adjustments plug-in
If changes are required to the estimate, follow the "Estimate Correction Procedure" detailed in the "TDOT Progress Estimate Correction Workflow" table.	External
Notify the District Supervisor to begin review of the estimate. Refer to "TDOT Estimate Review and Approve Workflow" table.	External

Table 4. TDOT Progress Estimate Generation Workflow – Office Staff

TDOT Estimate Generation Schedule

All progress estimates are generated by the Office Staff. 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 5. TDOT Progress Estimate Generation Schedule

Viewing the Unauthorized DWR Report

The BOE report, *Unauthorized DWR*, displays a list of DWRs that have not been authorized for the specified time period on the selected contract.

Navigation: Accessories > System Attachments > SM Reports (BOE reports)

Figure 2. BOE Report - Unauthorized DWR - Parameters

Print Date: 02/05/2016   **TENNESSEE DEPARTMENT OF TRANSPORTATION**
JJ02834

SITEMANAGER
Unauthorized DWR Report

Contract: CNP063
Report Ending Date: 02/05/2016

DWR Date	Inspector	Remarks
03/28/2015	Smith, Terry	
03/28/2015	Smith, Joe	
03/29/2015	Smith, Terry	
03/30/2015	Smith, Terry	
03/31/2015	Smith, Terry	
04/01/2015	Smith, Terry	
04/02/2015	Smith, Terry	
04/03/2015	Smith, Terry	
04/04/2015	Smith, Terry	
04/05/2015	Smith, Terry	
04/06/2015	Smith, Terry	
04/07/2015	Smith, Terry	
04/08/2015	Smith, Terry	
04/09/2015	Smith, Terry	
04/10/2015	Smith, Joe	
04/10/2015	Smith, Terry	

Page: 1

Figure 3. BOE Report - Unauthorized DWR

Viewing the DWR Template Report

The BOE report, *DWR Template,* displays all the items of work recorded on Daily Work Reports (DWRs) for a selected time period.

Navigation: Accessories > System Attachments > SM Reports (BOE reports)

Figure 4. BOE Report - DWR Template - Prompts

Figure 5. BOE Report - DWR Template

THE BOE REPORT, DWR TEMPLATE, MAY BE USED TO REVIEW QUANTITIES RECORDED IN DWRS THAT HAVE NOT YET BEEN INCLUDED IN AN ESTIMATE. FOR MAINTENANCE CONTRACTS, THIS REPORT WILL BE USED TO CONFIRM THE MMS TEMPLATE WAS COMPLETED AS REQUIRED.

DISCREPANCIES IN PLACED QUANTITY TOTALS AND MISSING TEMPLATE INFORMATION MAY BE APPARENT AND THEREFORE ADDRESSED PRIOR TO ESTIMATE GENERATION.

IN THE "AUTH" COLUMN, "Y" INDICATES THE QUANTITY IS AUTHORIZED FOR PAYMENT AND "N" INDICATES THE QUANTITY IS NOT AUTHORIZED.

Exercise 1

In this exercise, review the BOE report, *DWR Template*.

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 5, for item **705-04.07**, what is the total quantity reported to date? _____*

2. *In Figure 5, for item **705-04.07**, what is the quantity authorized to date? _____*

3. *In Figure 5, for item **706-10.54**, what is the quantity paid to date? _____*

4. *In Figure 5, for item **706-10.54** on the DWR from **11/17/2015**, where was this guardrail re-aligned? _____*

5. *In Figure 5, on which date did the inspector forget to use the **MMS02** template? _____*

You've run the BOE report, DWR Template.

Generating a Progress Estimate

Access the Generate Estimate window from the Contractor Payments panel.

The first and all subsequent estimates leading up to the final estimate are progress estimates. The progress estimate is the system default (standard choice).

To generate an estimate, either select the Generate Estimate choice from the Services menu or click the Generate Estimate button on the toolbar.
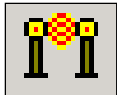
Figure 6. Generate Estimate Button

When Generate Estimate is initiated by clicking the Generate Estimate button, SiteManager will verify that a prior estimate does not exist for an overlapping period of time (only one estimate is valid for a period of time). If one does exist, the system prompts the user with a window to confirm the deletion of the prior estimate. If the deletion is confirmed, the generation process will delete the prior estimate and initiate the generation of the new estimate as a background process. Otherwise, the generation is halted leaving the prior estimate intact.

TDOT WILL NOT USE THE DELAY GENERATION BOX.

WHEN SELECTED, THE 'DELAY GENERATION' PREVENTS THE ESTIMATE FROM GENERATING.

Figure 7. Generate Estimate Window

Once the estimate has been submitted, an In-Box message will confirm whether the estimate generated successfully.

Tip: If the contract you wish to generate an estimate for is not on the contract pick-list or you receive the message, "You do not have Authority to Generate an Estimate" ensure that the contract status is 'Active' and that the contract Notice to Proceed critical date has been populated. The Notice to Proceed Date is the 'Begin' date of any contract's first estimate period.

Estimate Activities

Follow the estimate generation process to generate an estimate for the contract. Generate a progress or a final estimate. The system performs a series of background processes that involve the following activities:

- **Delete pending estimate.** The system deletes any previous pending estimate that has been calculated but not approved. This removes only details tied to the previous pending estimate.

- **Determine quantities for payment.** The system determines the quantity to pay for each line item on the contract that has items installed for the estimate period.

- **Calculate stockpiled materials.** The system determines if an installed item has stockpiled materials. If it does, the process uses a stockpiled materials conversion factor to add a new line item adjustment to adjust the amount of payment to make for the line item.

- **Identify discrepancies.** The system checks for and reports 'discrepancies' for the work being performed by defined rules and conditions, for example, overruns, checklist events and materials samples. This activity populates 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.** The system calculates the funding amount for the different funding sources based upon the funding given for the contract, project, category or item.

Types of Estimates

- Progress (first and all intermediate)

- Final

- Supplemental (Used only when final estimate has been fully approved and paid. Verify in the Estimate Tracking window.)

Exercise 2

In this exercise, generate a progress estimate.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		

1. Start and log onto SiteManager as user **jj00029** *while connected in server mode*.

Open the Generate Estimate window.

2. On the **Main Panel** panel, double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

3. On the **Contractor Payments** panel, double-click the **Estimate** icon. The system displays the Estimate panel.

4. Double-click the **Generate Estimate** icon. The system displays the Contracts window.

Identify the contract to use.

5. In the **Contract ID** column, scroll to and double-click **TRN356a**. The system displays the Generate Estimate window.

Specify the date range and generate the estimate.

6. In the **End** field, type **093014**.

7. On the keyboard, press the **Tab** key.

8. In the **Type** area, confirm that the system has selected **Progress**.

   Note: The Last Estimate Number field displays 0001 and the Generate Estimate Number field shows 0002 indicating that this is the first time this 0002 estimate has been generated.

9. On the toolbar, click the **Generate Estimate** button. The system displays a message to inform that the process has been submitted.

10. In the message about the submission, click **OK**. The system displays a message to inform that the process has completed.

11. In the message about the completion, click **OK**.

> IN TRAINING, IF THE SYSTEM DISPLAYS A MESSAGE ABOUT 'NO SERVERS BEING AVAILABLE,' CLICK 'NO.'

Prepare for the next exercise.

12. To close the Generate Estimate window, click the **Close** button. The system displays the Estimate panel.

You've generated a progress estimate.

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

- **Total to Date ($)** – combined totals for all estimates

Figure 8. Estimate Summary Window

Exercise 3

In this exercise, view the Estimate Summary window.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356a**; **0002** (estimate)		

1. On the **Estimate** panel, double-click the **Estimate Summary** icon. The system displays the Select Contract and Estimate window.

Change contracts.

2. In the **Selection** area, click the **Contract** button.

3. In the **Contract** area, in **Contract ID** column, double-click **TRN356b**. The system displays the Estimate area.

Select the estimate.

4. In the **Estimate Number** column, double-click **0002**. The system displays the Estimate Summary window.

5. What is the amount paid to the contractor on this estimate?
    _____

6. Are there adjustments on this estimate? _____

7. To close the Estimate Summary window, click the **Close** button. The system displays the Estimate panel.

You've viewed the Estimate Summary window.

Navigation: Accessories > In-Box

Figure 9. In-Box Window
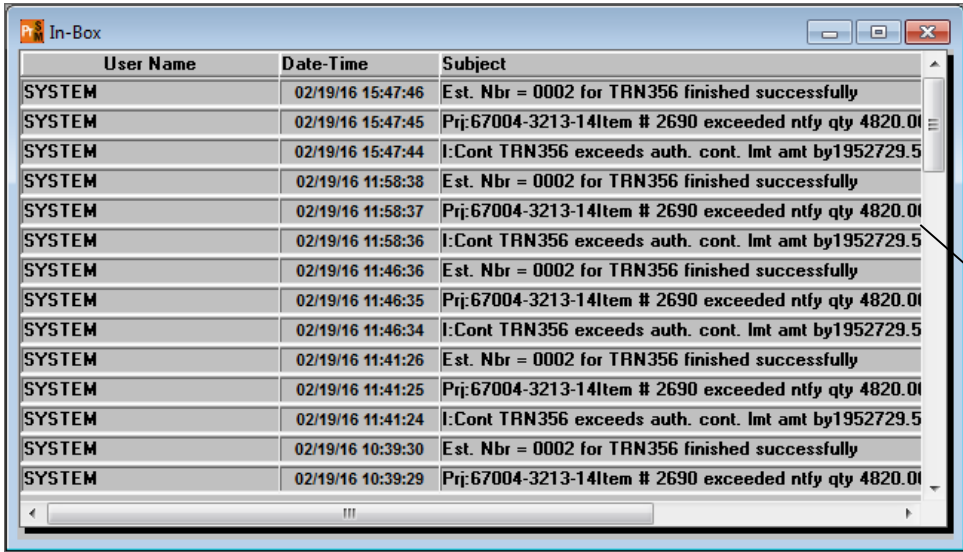
> AS AN ALTERNATIVE TO OPENING THE ESTIMATE SUMMARY WINDOW DIRECTLY, THE IN-BOX SHOULD BE VIEWED 1-2 TIMES DAILY FOR ESTIMATE AND CHANGE ORDER REVIEW/APPROVAL NOTICES.

Understanding Estimate Discrepancies

There are five types of discrepancies utilized at TDOT. Each is identified using different criteria. Discrepancies must be resolved in the following order.

> TWO OPTIONS WITH DISCREPANCIES:
>
> - OVERRIDE WITH COMMENT
>
> - RESOLVE AND RECALCULATE

- **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.

> CHECKLIST EVENT REQUIRES RECALCULATING DISCREPANCIES.

- **Deficient Tested Material Discrepancy** – Occurs if the Sampling & Testing Requirements are not met.

> DEFICIENT MATERIALS REQUIRES ESTIMATE REGENERATION.

- **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.

> THE FOLLOWING DISCREPANCIES CAN BE OVERRIDDEN:
>
> - OVERRUN
> - MILESTONE COMPLETION
> - CONTRACT COMPLETION

- **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 panel.

The system identifies the discrepancies associated with an estimate and displays them in the Estimate Discrepancies 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 Discrepancies window, and the item discrepancies are listed after them. The Status field value is 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.
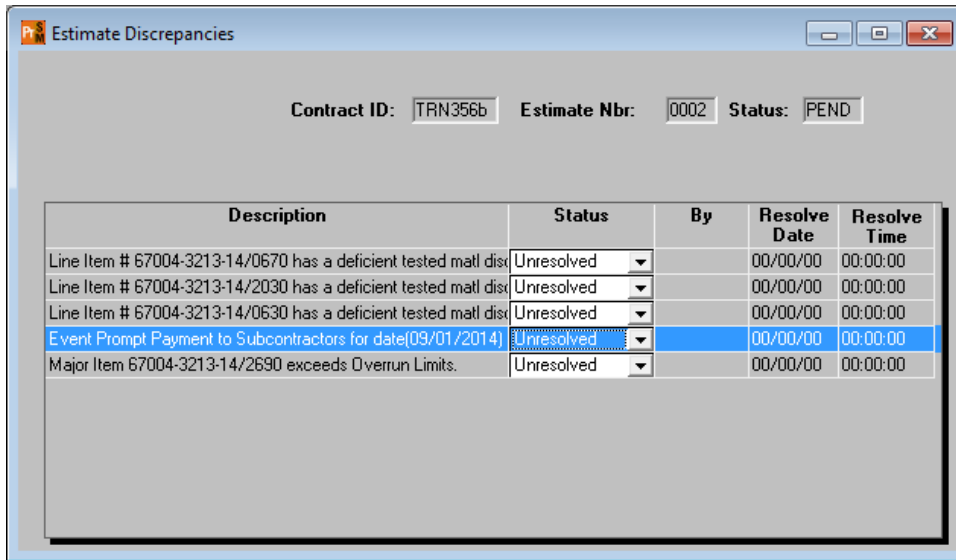
Figure 10. Estimate Discrepancies Window (5 of 5 unresolved discrepancies)

THE OFFICE STAFF NEEDS TO INVESTIGATE ALL DISCREPANCIES TO ENSURE THE ACCURACY OF ITEM QUANTITIES AND RECORDED DATES WITHIN THE APPLICATION. THE DISTRICT SUPERVISOR WILL REVIEW DISCREPANCIES AND DETERMINE WHETHER AN ACTION NEEDS TO TAKE PLACE – OVERRIDE, CORRECT DWR, OR INITIATE CHANGE ORDER.

Figure 11. Navigate Button

Exercise 4

In this exercise, view the discrepancies for an estimate.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356b**; **0002** (estimate)		

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon. The system displays the Estimate Discrepancies window.

2. How many unresolved discrepancies exist? _____

You've viewed the Estimate Discrepancies window.

Viewing the Estimate Discrepancy Report

To view the discrepancies with descriptions of the items, rather than the line item number alone, run the BOE report, *Estimate Discrepancy* [CR01].

Navigation: Accessories > System Attachments > SM Reports (BOE reports)

Figure 12. BOE Report - Estimate Discrepancy [CR01] - Prompts

Figure 13. BOE Report - Estimate Discrepancy [CR01]

Resolving 'Checklist Event Completion Date Missed Discrepancy' Type Discrepancies

Figure 14. Checklist Event Dates Window

 Exercise 5

In this exercise, resolve an estimate discrepancy for a missed checklist event.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356b**; **0002** (estimate)		

1. On the Estimate Discrepancies window, in the **Description** column, select **Event Prompt Payment to Subcontractors for date (09/01/2014) has not occurred**.
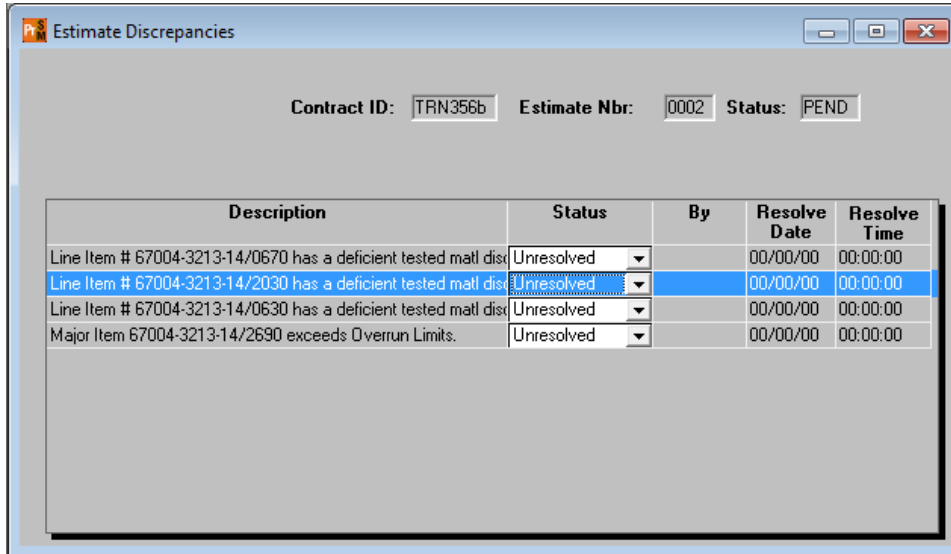
Now, jump to the part of the system where the unresolved discrepancy occurred.

2. On the toolbar, click the **Navigation** button. The system displays the Checklist Event Dates window.

3. In the **Event Type** column, select **Prompt Payment to Subcontractors**.

4. In the **Projected Date** column, select the row for **09/01/14**.

5. In the **Actual Date** field, and type **091414.**

6. **Save**.

7. **Close**. The system closes the Checklist Event Dates window and displays the Estimate Discrepancies window.

You've resolved an estimate discrepancy for a missed checklist event.

Recalculating Estimate Discrepancies

In the Estimate Discrepancy window, use the Services menu to recalculate discrepancies. Any resolved discrepancies will be removed from the estimate but will not affect unresolved discrepancies.

Figure 15. Estimate Discrepancies Window (4 of 5 unresolved discrepancies after recalculating)

THE OFFICE STAFF WILL RECALCULATE DISCREPANCIES AFTER COMPLETING ALL POSSIBLE ESTIMATE DISCREPANCY RESOLUTIONS. THIS WILL NEED TO BE DONE PRIOR TO RESOLVING DEFICIENT MATERIAL DISCREPANCIES AND OVERRIDING ESTIMATE DISCREPANCIES.

Exercise 6

In this exercise, recalculate estimate discrepancies.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356b**; **0002** (estimate)		

1. From the **Services** menu, select **Recalculate Discrepancies**. The system displays a message to inform that this may take several minutes to perform.

2. In the message, click **Yes**. The system displays a message to inform you that the refresh is complete.

3. In the message, click **OK**. The system removes the resolved discrepancy.

4. **Save**.

> THE RESOLVED DISCREPANCIES ARE NO LONGER ON THE LIST.

5. How many discrepancies exist on this estimate after recalculating discrepancies? _____

6. **Close.** The system closes the Estimate Discrepancies window and displays the Estimate panel.

You've recalculated estimate discrepancies.

Resolving 'Deficient Tested Material Discrepancy' Type Discrepancies

Also, use the Estimate Discrepancies window to identify deficient tested materials discrepancies. Contract sampling and testing requirements have been set up in the system based on the Standard Operating Procedures (SOP) issued by the Materials & Tests Division and discrepancies occur when the total installed quantity on an item(s) exceeds the fully approved testing requirements recorded in the system.

The deficiency could be due to a variety of things. For example, on items of work that require a sample record and tests results by Inspector (that is, density, gradations, and so on)

- Not enough tests were performed and the message (and deduction) is valid.

- A test(s) entered has failing results and the message (and deduction) is valid.

- All required tests were performed but some still need to be entered into SiteManager.

- All required tests were performed and entered but the sample record is not fully approved.

- A test(s) has failing results due to a data entry error which needs to be corrected.

A sample record only by Office Staff (that is, T2 Certifications)

- Not enough T2's were received and the message (and deduction) is valid.

- Not all T2's have been entered into SiteManager yet or the sample record is not complete.

- A Representative Qty was not entered on the Contracts panel of the sample record. *(This field is only used for T2 Certifications!)*

- A data entry error occurred on the sample record which needs to be corrected.

The Estimate Discrepancies window displays discrepancies by Line Item Number. The Line Item Adjustments window can be used to identify the item number(s) and to see the quantity and amount being withheld.

Note: For items with multiple materials, the system will hold a percentage of payment based on the least satisfied material.

Figure 16. Line Item Adjustments Window
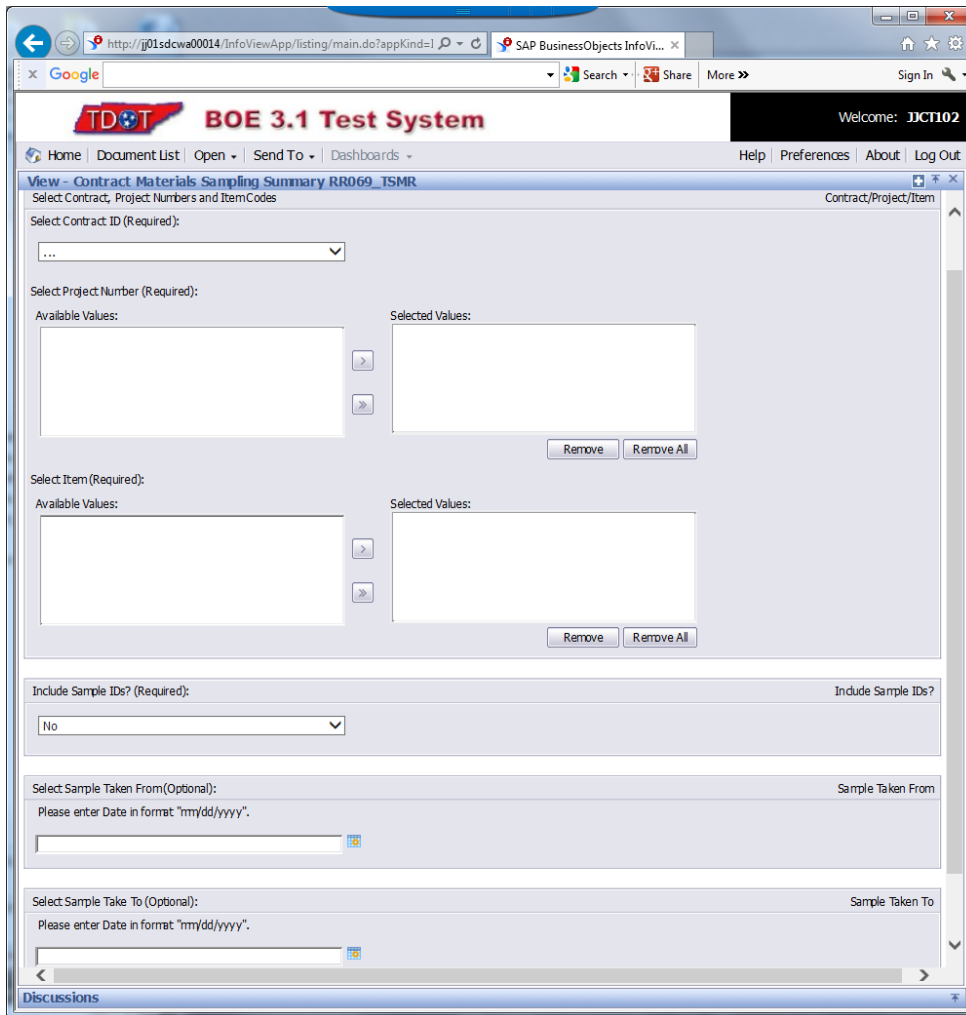
Figure 16 has three line item adjustments because of material discrepancies. The following exercises illustrate the appropriate steps to follow for each line item adjustment. For each material discrepancy payment adjustment users will do the following:

a. Review the details of BOE report, *Contract Materials Sampling Summary,* for the line item with the discrepancy.

b. Determine the accuracy of the discrepancy and what corrective action is needed.

Viewing the Contract Materials Sampling Summary Report for T2 Items

The BOE report, *Contract Materials Sampling Summary,* displays details regarding the item code, materials code(s), testing requirements and sample records entered and should be used to help identify any missing sampling and testing requirements.

Navigation: Accessories > System Attachments > SM Reports (BOE reports)

Figure 17. BOE Report - Contract Materials Sampling Summary [RR069] – Prompts

Figure 18. BOE Report - Contract Materials Sampling Summary [RR069]

Unauthorizing a Sample Record to Modify a Sample Record

 Exercise 7

In this exercise, unauthorize an electronic T2 record, make corrections and reauthorize.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356b**; **0002** (estimate)		
Scenario	**There was an estimate discrepancy found for line item number 2030. The Contract Materials Sampling Summary report shows a Required Qty at 88.34, but the Rep. Qty on sample is 8.34. T2 paperwork shows 88.34 so Rep Qty on the sample has to be modified to match that.**		

Locate the desired sample record.

1. Click the **Main Panel** tab. The system displays the Main Panel panel.

2. Double-click the **Materials Management** icon. The system displays the Materials Management panel.

3. Double-click the **Sampling and Testing** icon. The system displays the Sampling and Testing panel.

4. Double-click the **Sample Information** icon. The system displays the Maintain Sample Information window.

Locate the desired sample record.

5. On the toolbar, click the **Open** button. The system displays the Select Sample window.

6. In the **Sample** area, click the **Sample ID** column header.

7. In the **Find** field, type **85810**.

8. In the **Sample ID** column, double-click **jj000291637085810**. The system displays the Maintain Sample Information window.

Unauthorize the sample record.

9. From the **Services** menu, select **Unauthorize**. The system displays a message to confirm the decision to unauthorize the sample record.

10. In the message, click **Yes**. The system changes the Status from Completed to Pending Authorization.

11. **Save**.

Correct the represented quantity.

12. Click the **Contract** tab. The system displays the Contract panel.

13. In the **Represented Qty** field, change the value to **88.34** (from 8.34).

14. **Save**.

Locate the sample record in the Review Samples window.

15. On the toolbar, click the **Open LIMS** button. The system displays the Navigation Panel window.

16. Double-click the **Review Samples** icon. The system displays the Review Samples window.

17. In the **Filter Criteria** area, select **Sample ID Contains 85810**.

18. Click **Apply**. The system displays the jj000291637085810 sample record's M017 test.

Authorize the sample record again.

19. In the **Authorize** column, select the check box.

20. In the **Acceptance Method** column, select **CERT – Certification**.

21. In the **Sample Status** dropdown list, select **COMP - Completed**.

22. **Save**.

Prepare for the next exercise.

23. Click the **Reset** button. The system clears the filter criteria.

24. **Close**. The system closes the Review Samples window and displays the Navigation Panel window.

25. To exit LIMS, on the toolbar, click **Exit SiteManager LIMS**. The system displays a message to confirm.

26. In the message, click **Yes**. The system displays the Maintain Sample Information window.

27. To exit SiteManager, on the toolbar click **Exit SiteManager**.

You've unauthorized an electronic T2 record, made corrections and reauthorized.

Identifying Materials Discrepancy Adjustments by Sample Count

Unlike items that are paid which require T2 Certifications, items of work recorded and paid by the inspector may require material testing. As a result, the materials used on an item have been setup with rate and frequency testing requirements.

Example: If Standard Operating Procedures (SOP) require 1 test (rate) per every 2500 tons (frequency), the system will require one (1) approved sample record for every 2500 tons of material to be paid. For items with multiple materials/tests, the system will only pay the least satisfied test.

Item Code 303-01, Mineral Aggregate, Type A Base, Grading D

A total of **2600 Tons** has been approved for payment on Daily Work Reports this estimate period.

Tests Required	Rate (per SOP)	Frequency (per SOP)	Samples Required	Approved Sample Records	Quantity Adjusted
T255 – Total Evaporable Moisture of Aggregate by Drying	1	2,500	2	1	100
T27 – Sieve Analysis of Fine and Coarse Aggregates	1	2,500	2	2	0
T310 – Nuclear Density/Moisture of Soil & Agg	1	10,000	1	1	0

*In this example, the **T255** test is the least satisfied requirement, which results in a material discrepancy adjustment of **-100 Tons**.*

Examples of BOE report pages for *Contract Materials Sampling Summary* [RR069] with detail about line item number 0630 (item code 303-01) follows:

Figure 19. BOE Report - Contract Materials Sampling Summary [RR069] – LIN 0630

Figure 20. BOE Report - Contract Materials Sampling Summary [RR069] – LIN 0630

Exercise 8

In this exercise, learn how to determine which requirement on an item is the least satisfied and will determine the amount paid.

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 19, what is the value in the **T255** test's **Test Balance** field? _____*

2. *In Figure 19, what is the value in the **T27** test's **Test Balance** field? _____*

3. *In Figure 20, what is the value in the **T310** test's **Test Balance** field? _____*

4. *Which test is least satisfied? _____*

You've learned how to determine which requirement on an item is the least satisfied and will determine the amount paid.

Unauthorizing a Sample Record to Requeue a Test

NOTE: DURING THE ESTIMATE PROCESS IF A SAMPLE RECORD WITH A STATUS OF COMPLETED NEEDS CORRECTIONS, IT MUST BE UNAUTHORIZED AND REQUEUED BY OFFICE STAFF AND THEN, THE INSPECTOR MUST MAKE CORRECTIONS AND REAUTHORIZE ON THE SERVER.

 Exercise 9

In this exercise, find a sample that contains a test with failing results due to a data entry error, then unauthorize and requeue.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Scenario	**While reviewing the BOE report (*see Figure 19 and Figure 20*), Office Staff noticed a failed T310 test and a shortage on the T255 test and contacted the Field Staff. Field Staff said it would run another T255 test and told the Office Staff to unauthorize the sample and requeue the T310 test on the sample done by an inspector.**		

1. Start and log onto SiteManager as user **jj00029** *while connected in server mode*.

2. Double-click the **Materials Management** icon. The system displays the Materials Management panel.

3. Double-click the **Sampling and Testing** icon. The system displays the Sampling and Testing panel.

Find the sample.

4. Double-click the **Find Sample** icon. The system displays the Find Sample Parameters window.
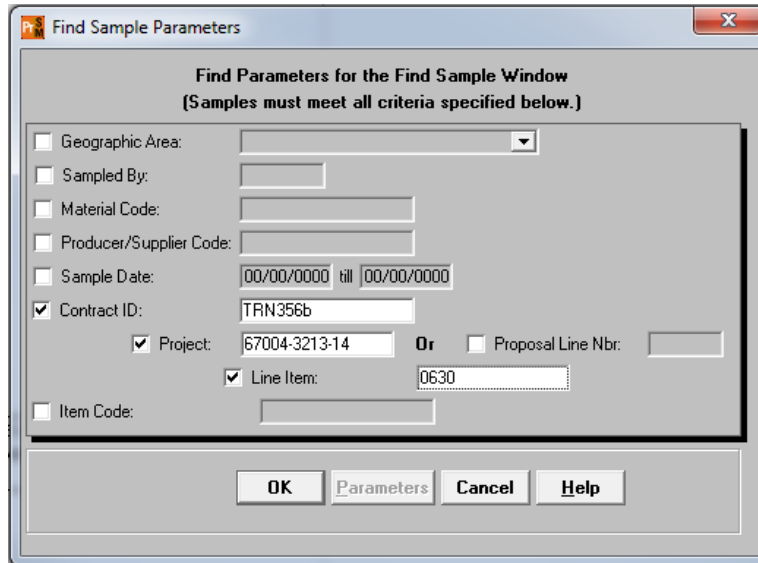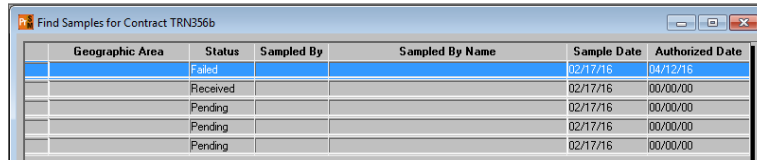
Figure 21. Find Sample Parameters Window

5. Select the **Contract ID** check box.

6. In the **Contract ID** field, type **TRN356b**.

7. Select the **Project** check box.

8. In the **Project** field, right-click and select **Search**. The system displays the Search Window window.

9. In the **Project Number** column, double-click **67004-3213-14**.

10. Select the **Line Item** check box.

11. In the **Line Item** field, right-click and select **Search**. The system displays the Search Window window.

12. In **the Ln Itm Nbr** column, double-click **0630**.

13. Click **OK**. The system displays the Find Samples for Contract < > window.

Figure 22. Find Samples for Contract < > Window (when scrolled left)

14. Use the horizontal scrollbar to scroll to the right.

Figure 23. Find Samples for Contract < > Window (when scrolled right)

15. In the **Status** column, select the row with the **Failed** status.

16. Use the horizontal scrollbar to scroll to the left.

17. In the **Sample ID** column, note the Failed sample is **jj000281637084442**.

View the sample record.

18. From the **Services** menu, select **View Sample**. The system displays the Maintain Sample Information window.

Unauthorize the sample record.

19. From the **Services** menu, select **Unauthorize**. The system displays a message to confirm the decision to unauthorize the sample record.

20. In the message, click **Yes**. The system changes the Status from Failed to Pending Authorization.

21. **Save**.

Send the test back to the lab.

22. On the toolbar, click the **Open LIMS** button. The system displays the Navigation Panel window.

23. Double-click the **Review Samples** icon. The system displays the Review Samples window.

24. In the **Filter Criteria** area, select **Sample ID Contains 84442**.

25. Click **Apply**. The system displays the jj000281637084442 sample record's T310 test.

26. In the **Send Test Back to Lab** column, select the check box.

27. **Save**. The system sends the test back to the Review Tests queue.

28. Click the **Reset** button. The system clears the filter criteria.

29. **Close**. The system closes the Review Samples window and displays the Navigation Panel window.

Requeue the test.

30. Double-click the **Review Tests** icon. The system displays the Review Tests window.

31. In the **Test Queue Criteria** area, click the **All My Lab Units** button.

32. In the **Filter Criteria** area, select **Sample ID Contains 84442**.

33. Click **Apply**. The system displays the jj000281637084442 sample record's T310 test.

34. In the **Supervisor Action** dropdown list, select **Re-Queue**. The system displays the Remarks window.

Add a remark.

35. In the Remarks window, select the **Requeue** remark type.

36. In the **Remarks** field, type **Sending test back to inspector for correction of test data. Inspector stated that he miskeyed the density results on the T310.**

37. On the toolbar, click the **Remarks** button. The system closes the Remarks window.

38. **Save**. The system sends the test back to the Enter Test Results queue.

    Note: At this point, the inspector would make the necessary change to the T310 test results and would submit the T310 test for review and eventual sample review. The inspector would also create a sample record for the T255 test or add that test to an existing sample then submit it for test and sample review.

Prepare for the next exercise.

39. Click the **Reset** button. The system clears the filter criteria.

40. **Exit SiteManager LIMS**. The system displays the Maintain Sample Information window.

41. **Close**. The system closes Maintain Sample Information window and displays the Find Samples for Contract < > window.

42. **Close**. The system closes the Find Samples for Contract < > window and displays the Sampling and Testing panel.

You've unauthorized and requeued the test on the sample.

Regenerating the Estimate
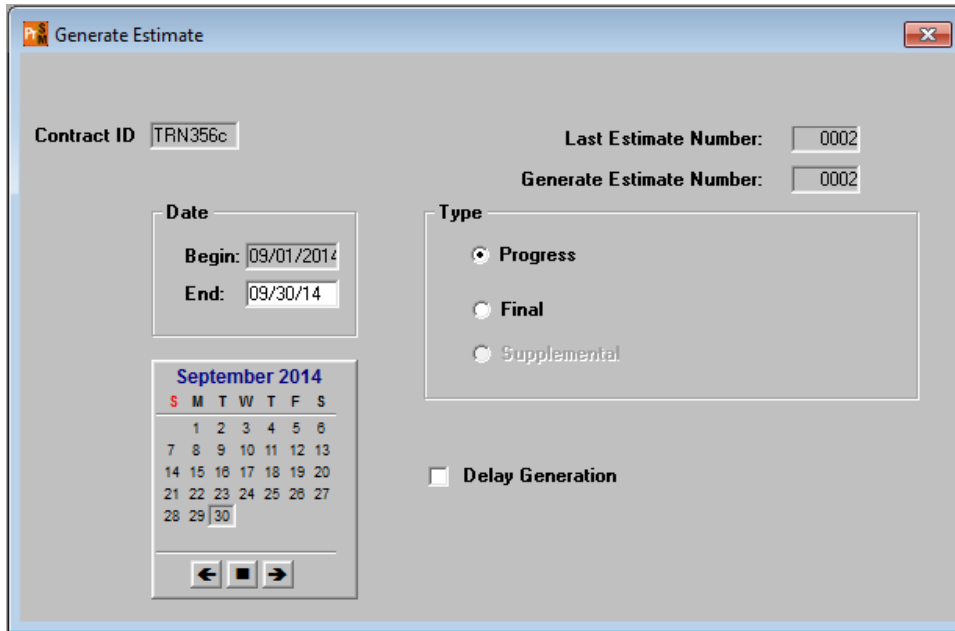
Figure 24. Generate Estimate (when estimate already exists)

Exercise 10

In this exercise, generate a progress estimate.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356b**; **0002** (estimate), **jj000281637084442**		
Scenario	**Assume the inspector has corrected the T310 results and authorized the sample again and submitted a new T55 test. Now, all of the discrepancies that could be resolved have been resolved.**		

EMPHASIZE THIS ASSUMPTION!

1. Click the **Main Panel** tab. The system displays the Main Panel panel.

Open the Generate Estimate window.

2. On the **Main Panel** panel, double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

3. On the **Contractor Payments** panel, double-click the **Estimate** icon. The system displays the Estimate panel.

4. Double-click the **Generate Estimate** icon. The system displays the Contracts window.

Identify the contract to use.

5. In the **Contract ID** column, scroll to and double-click **TRN356c**. The system displays the Generate Estimate window.

Specify the date range and generate the estimate.

6. In the **End** field, type **093014**.

7. On the keyboard, press the **Tab** key.

8. In the **Type** area, confirm that the system has selected **Progress**.

   Note: The Last Estimate Number field displays 0002 and the Generate Estimate Number field shows 0002 indicating that this is *not* the first time this 0002 estimate has been generated.

9. On the toolbar, click the **Generate Estimate** button. The system displays a message to inform that the estimate already exists and prompts to confirm deletion.

10. In the message about the deletion, click **Yes**. The system displays a message to inform that the process has been submitted.

11. In the message about the submission, click **OK**. The system displays a message to inform that the process has completed.

12. In the message about the completion, click **OK**.

13. **Close**. The system closes the Generate Estimate window and displays the Estimate panel.

You've regenerated a progress estimate.

Overriding Estimate Discrepancies

Overriding an Estimate Discrepancy in the Estimate Discrepancy window will cause the discrepancy to be ignored by SiteManager for the specified Estimate only.

TDOT Estimate Discrepancy Procedures

These are the only discrepancies which MAY be overridden on a progress estimate.

- **Overrun Discrepancy** – The Office Staff / District Supervisor should check the overrun quantity to verify if it is correct. The discrepancy may be overridden.

- **Milestone Completion Date Missed Discrepancy** – The Office Staff / District Supervisor will verify the discrepancy. The discrepancy may be overridden until a change order can be prepared and approved.

- **Contract Completion Date Missed Discrepancy** – The Office Staff / District Supervisor should verify the discrepancy, and if applicable, initiate a change order to correct it. The discrepancy may be overridden until the change order can be prepared and approved.

- **Material Discrepancy** – The Office Staff / District Supervisor will verify the discrepancy. The discrepancy may be overridden until the testing requirements are satisfied.
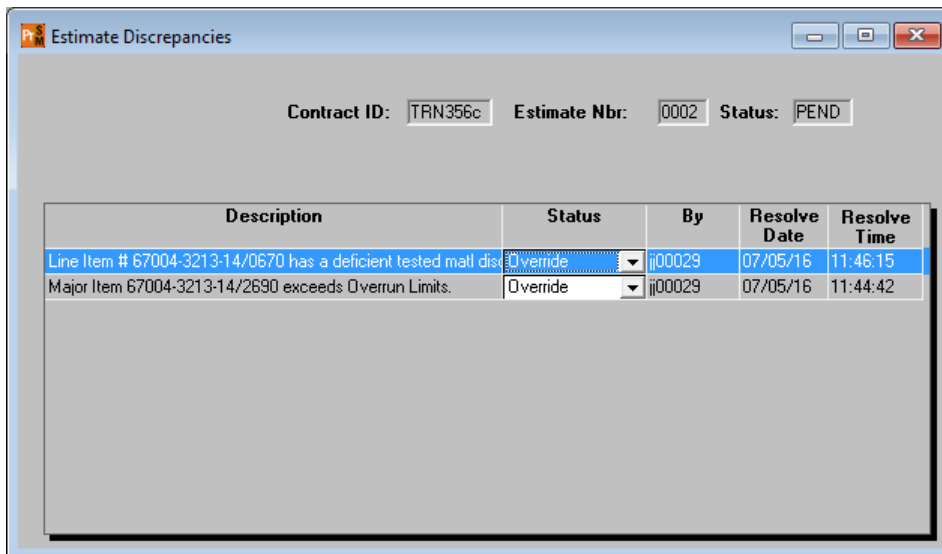
Figure 25. Estimate Discrepancies Window

IF AN ESTIMATE DISCREPANCY ON A PROGRESS ESTIMATE CANNOT BE RESOLVED, THE DISCREPANCY MUST BE OVERRIDDEN WITH AN EXPLANATION. WHEN OVERRIDING A DISCREPANCY, CLICK OUTSIDE OF THE REMARKS BOX AND SAVE AFTER EACH OVERRIDE EXPLANATION. DO NOT USE THE TAB KEY. CHECKLIST EVENTS CANNOT BE OVERRIDDEN.

Exercise 11

In this exercise, view the remaining discrepancies and override the discrepancies.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356c**; **0002** (estimate)		

1. Double-click the **Estimate Discrepancy** icon. The system displays the Select Estimate window.

2. In the **Estimate Number** column, double-click **0002**. The system displays the Estimate Discrepancies window.

Override a discrepancy.

3. Click the discrepancy for **Major Item 67004-3213-94/2690 exceeds Overrun Limits**.

4. In the **Status** dropdown list, select **Override**. The system displays a Remarks window.

5. In the **Remarks** field, type **Overrun due to design error**.

6. To close the Remarks window, on the toolbar, click the **Remarks** button.

7. **Save**.

Override another discrepancy.

8. Click the discrepancy for **Line Item # 67004-3213-94/0670**.

9. In the **Status** dropdown list, select **Override**. The system displays a Remarks window.

10. In the **Remarks** field, type **Testing requirements are not satisfied**.

11. To close the Remarks window, on the toolbar, click the **Remarks** button.

12. **Save**.

Prepare for the next exercise.

13. **Close**. The system closes the Estimate Discrepancies window and displays the Estimate panel.

14. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've overridden a discrepancy.

Entering Fuel, Bituminous Material, AC Content, and Anti-Strip Adjustments

A TDOT-developed plug-in accessible from the Contract window's Attachment functionality, is used to calculate and apply fuel, bituminous material, AC content and anti-strip adjustments.

The Adjustments plug-in is divided into seven panels: Adj. Process Submission, Fuel Adjustment Items, Bitm Adjustment Items, 307 A/C Adjustment Items, 411 A/C Adjustment Items, Liquid Anti-Strip, and Adjustment Setup.

The Adjustments plug-in will reference the estimate details to create the appropriate payment price adjustments for the current estimate period. The adjustments will be recorded as a line item adjustment and associated with one of the adjustment items listed in the following table.

If the item is removed, via the Line Item Adjustment window (by the 'insufficient sample discrepancy' option), then it is not adjusted.

IMPORTANT: The user must first generate and resolve all discrepancies for a pending estimate through standard SiteManager functionality before accessing the Adjustments plug-in.
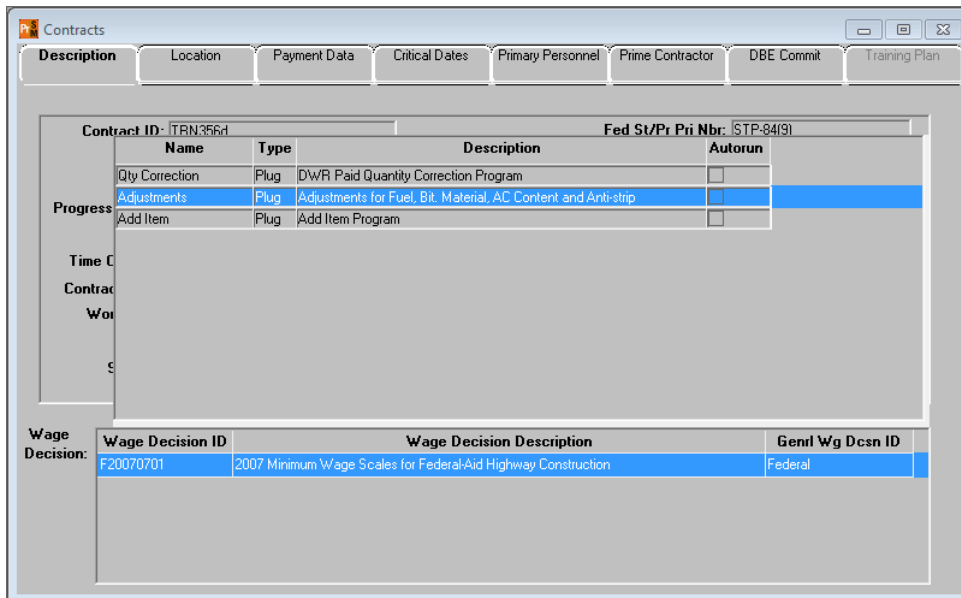
ONLY USERS ASSIGNED TO THE OFFICE STAFF USER GROUP ARE ABLE TO UPDATE THE ADJUSTMENTS PLUG-IN.

PRICE ADJUSTMENTS ARE ONLY ASSESSED WHEN THE MONTHLY INDEX VARIES BY 5% OR MORE FROM THE BIDDING INDEX.

Figure 26. Attachments Window

Item Code	Spec Year	Unit Sys	Price Adjustment Pay Item Description	Unit Of Measure
109-01.01	2000	Eng	PAY ADJUSTMENT FOR FUEL	Dollar
109-01.02	2000	Eng	PAYMENT ADJUSTMENT FOR BITUMINOUS MATERIAL.	Dollar
307-03.20	2000	Eng	PRICE ADJUSTMENT FOR AC CONTENT	Dollar
307-05.40	2000	Eng	PAYMENT ADJUSTMENT FOR LIQUID ANTI-STRIP	Dollar
411-03.20	2000	Eng	PRICE ADJUSTMENT FOR ASPHALT CEMENT CONTENT	Dollar
411-05.40	2000	Eng	PAYMENT ADJUSTMENT FOR LIQUID ANTI-STRIP	Dollar

Table 6. TDOT Price Adjustment Pay Item List

The steps to use the Adjustments plug-in are as follows and are detailed on the following pages.

1. Generate and review the estimate.

2. Resolve or override discrepancies.

3. Access the Adjustments plug in (Main Panel > Contract Administration > Contracts > select Contract > click Attachments button > double-click Adjustments

4. Review messages for the estimate adjustments on the Adj. Process Submission panel of the Adjustments plug-in.

5. When applicable, enter monthly Anti-Strip Invoice Price, Mix Design and Recycled Asphalt percentages and dates for the pay items included in the estimate and listed on the Adjustment Setup panel of the Adjustments plug-in.

6. Confirm all messages have been satisfied for the estimate adjustments on the Adj. Process Submission panel of the Adjustments plug-in.

7. Click the Calc. button on the Adj. Process Submission panel of the Adjustments plug-in to generate adjustments to the estimate and provide 1st level approval of the estimate.

8. View adjustments made by the system on the Fuel Adjustment Items, Bitm Adjustment Items, 307 A/C Adjustment Items, 411 A/C Adjustment Items, and Liquid Anti-Strip panel of the Adjustments plug-in.

Adjustments Plug-in's Adj Process Submission Panel

To initiate the adjustment process by selecting the Calculation option or to delete a pending estimate adjustment, use the Adj. Process Submission panel.

In the Estimate Nbr dropdown list, select the estimate to for which to use the Adjustments plug-in. The window displays the selected estimate period begin and end dates as well as the status of the selected estimate. The bottom panel displays pertinent processing messages for the adjustments process associated with the selected estimate.

Information about the process messages follows:

- If a pending estimate exists for the contract, the first message is always the pending estimate number.

- If the selected estimate is an approved estimate then a message stating that the Adjustment cannot be made for this estimate will display.

- If the selected estimate has 307/411 items placed during an estimate period in which an appropriate Mix Design (DA) percentage has not been entered, then a message stating what is needed and that Adjustments cannot be made will display.

- If the selected estimate has Fuel, Bituminous, or 307/411 items placed during the estimate period without the appropriate price indices then a message appears. (Entered by HQ Construction).

- If adjustments are not associated with the contract then contact HQ Finance.

- If MMS Template data is required and has not been entered then a message stating the Adjustments cannot be made for this estimate will display. (Maintenance Contracts Only).

Exercise 12

In this exercise, access the Adjustments plug-in's Adj. Process Submission panel.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356c**; **0002** (estimate)		

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. The system displays the Contract Records panel.

3. Double-click the **Contracts** icon. The system displays the Contracts window.

4. On the toolbar, click the **Open** button. The system displays the Select Contract window.

5. In the **Contract ID** column, scroll to and double-click **TRN356e**.

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

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 see the results of each step and to answer the questions.

7. *Double-click the **Adjustments** attachment. The system displays the TDOT Price Payment Adjustment window.*
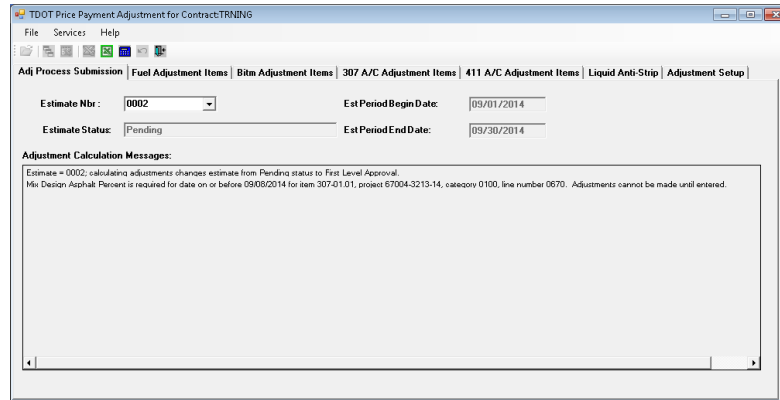
THIS WINDOW DISPLAYS A LIST OF THE ACTIONS REQUIRED FOR ADJUSTMENTS TO CALCULATE CORRECTLY.

IN THIS EXAMPLE, THE FIRST MESSAGE INDICATES THE ESTIMATE IS IN PENDING STATUS WHILE THE SECOND MESSAGE INDICATES THE ASPHALT PERCENT IS REQUIRED (AND MISSING).

Figure 27. Adjustments Plug-in - Adj. Process Submission Panel

8. *In the **Adjustment Calculation Messages** area, notice the remaining issues to address. All valid discrepancies must be resolved before making adjustments.*

9. *What is the 307.01-01 item missing that is preventing adjustments from being made? _____*

10. *Click the **Fuel Adjustment Items** tab.*
    Note: Fuel adjustments were made on this estimate.

11. *Click the **Bitm Adjustment Items** tab.*
    Note: No bituminous adjustments were made on this estimate yet.

12. *Click the **307 A/C Adjustment Items** tab.*
    Note: 307 A/C adjustments were made on this estimate.

13. *Click the **411 A/C Adjustment Items** tab.*
    Note: 411 A/C adjustments were made on this estimate.

14. *Click the **Liquid Anti-strip** tab.*
    Note: No liquid anti-strip adjustments were made on this estimate yet.

You've accessed the Adjustments plug-in's Adj. Process Submission panel and verified that no adjustments were made yet.

Adjustments Plug-in's Adjustment Setup Panel

The Adjustments Setup panel provides maintenance capabilities for item specific and contract level Mix Design (DA) and Recycled Asphalt (RA) Content performance grade asphalt invoice prices as well as liquid anti-strip prices.

The plug-in automatically creates one DA/RA row for each applicable contract item that has a DWR work item recorded against that item.

When the user accesses this panel, only the latest DA/RA values and PG Invoice dates are displayed.

To update any values, select the row, select the Open option, and then select new. The system keeps a history of values entered in the Adjustment Setup panel. To access the history (all previously entered AC values), select the row, and then select open.

Exercise 13

In this exercise, to complete the adjustments for the contract, enter the required information noted on the Adj Process Submission panel.

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 see the results of each step.

1. *Click the **Adjustment Setup** tab. The system displays the Adjustment Setup panel.*

ONLY PROJECTS WITH INSTALLED QUANTITIES WILL REQUIRE SETUP.

Figure 28. Adjustments Plug-in - Adjustment Setup Panel

2. *On the **Adjustment Setup** panel, in the **Mix Design Asphalt Percentages** area, select the following row:*

   *Project **67004-3213-14**, Item Cd **307.01-01**.*

3. *On the toolbar, click* **Open**. *The Adjustments plug-in displays the Mix Design Percentage Setup window.*
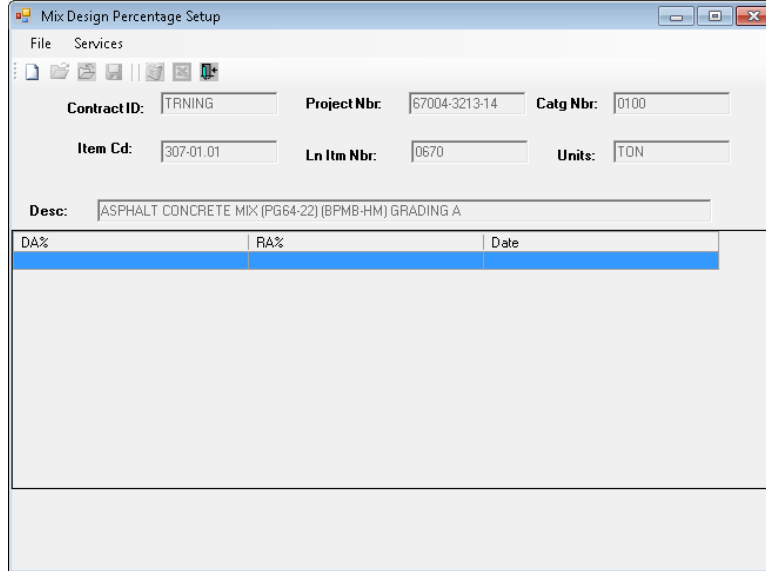
Figure 29. Adjustments Plug-in – Mix Design Percentage Setup Window

4. *Click* **New**. *The system displays fields for input.*

5. *In the* **Mix Design (DA) Pct** *field, type* **3.5**.

6. *In the* **Recycled (RA) Pct** *field, type* **1.14**.

7. *In the* **Date** *field, type* **090114**.
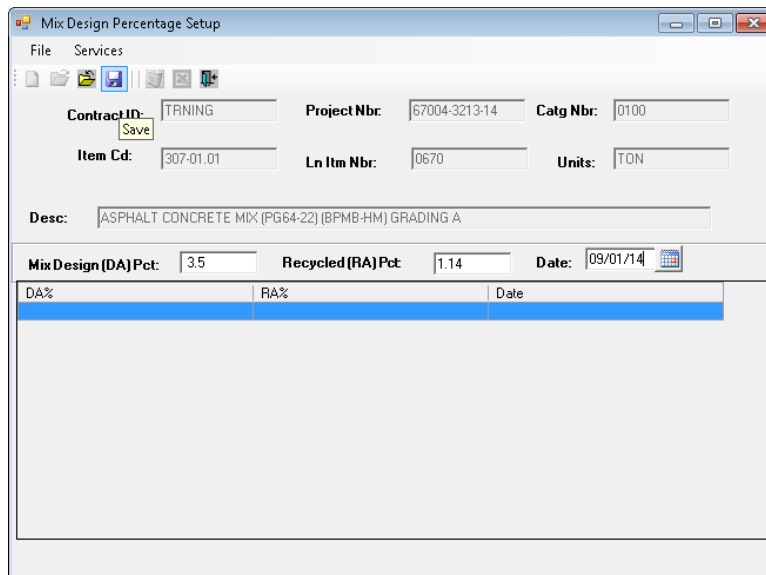
Figure 30. Adjustments Plug-in – Mix Design Percentage Setup Window (after clicking New button and recording values)

8. **Save**. *The system closes the input fields and adds a new row with the information you entered into the lower area of the window.*
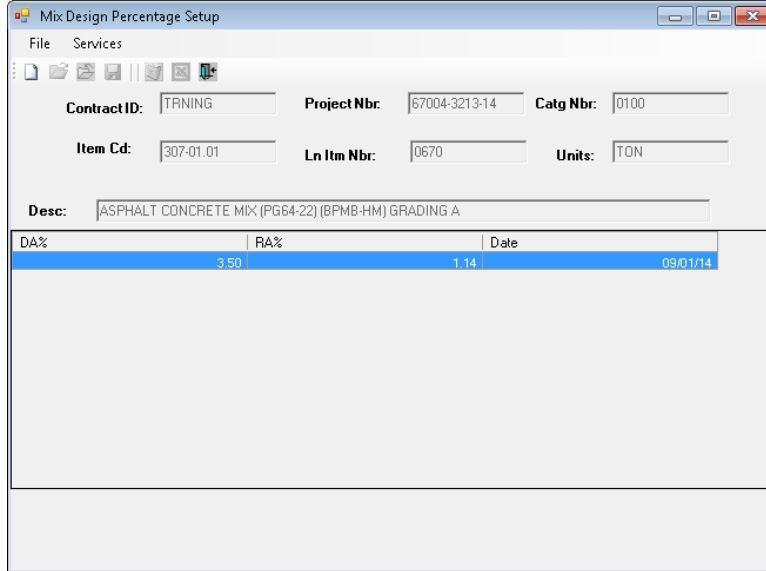
Figure 31. Adjustments Plug-in – Mix Design Percentage Setup Window (after clicking Save button)

9. *To close the Mix Design Percentage Setup window, click the **Close** button. The system displays the Adjustment Setup panel.*
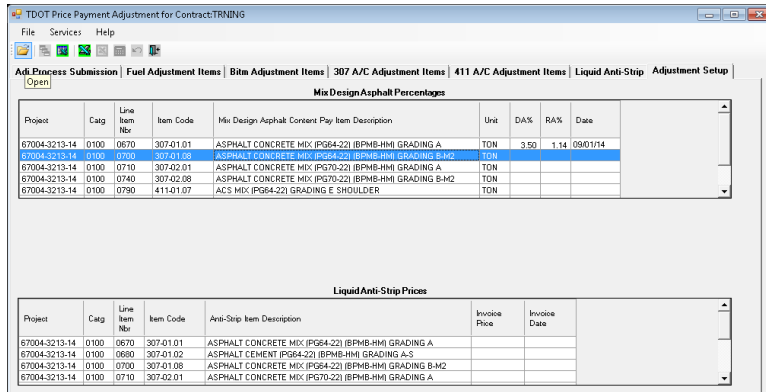
Figure 32. Adjustments Plug-in - Adjustment Setup Panel

10. *Click the **Adj Process Submission** tab. The system displays the Adj Process Submission panel.*
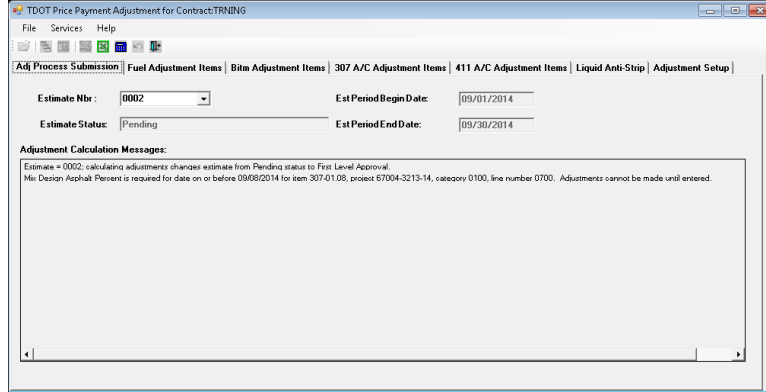
Figure 33. Adjustments Plug-in - Adj. Process Submission Panel

11. *Has the error been resolved? _____*

12. *Which item is still missing the mix design asphalt percent? _____*

13. *Click the **Adjustment Setup** tab. The system displays the Adjustment Setup panel. The system displays the recent percentages entered for the 307-01.01 item.*

Enter another mix design asphalt percentage.

14. *Select the following row:*

    *Project **67004-3213-14**, Item Cd **307.01-08**.*

15. *On the toolbar, click **Open**. The system displays the Mix Design Percentage Setup window.*

16. *Click **New**.*

17. *In the **Mix Design (DA) Pct** field, type **4.3**.*

18. *In the **Recycled (RA) Pct** field, type **1.16**.*

19. *In the **Date** field, type **090114**.*

20. **Save**. *The system adds a new row with the information you entered into the lower area of the window.*
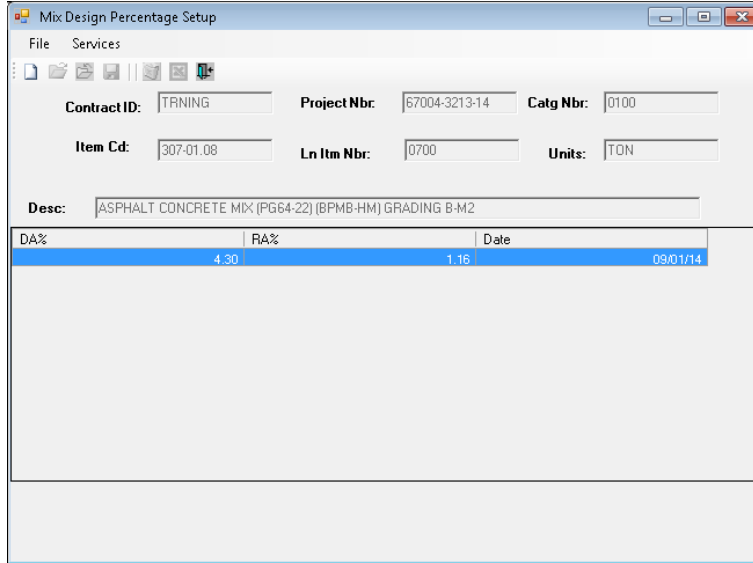
Figure 34. Adjustments Plug-in – Mix Design Percentage Setup Window (after clicking New button and recording values)

21. *To close the Mix Design Percentage Setup window, click the* **Close** *button. The system displays the Adjustment Setup panel.*
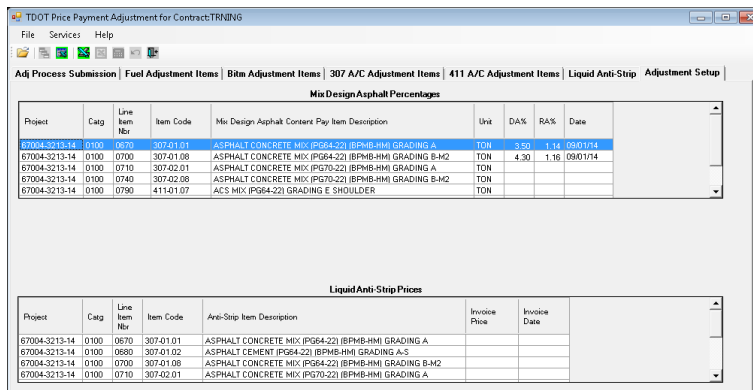
Figure 35. Adjustments Plug-in - Adjustment Setup Panel

You've entered information for two adjustments.

ONCE AN ESTIMATE IS PAID IT LOCKS THE MIX DESIGN PERCENTAGES SO THAT THEY CANNOT BE CHANGED FOR THAT ESTIMATE PERIOD. TO CORRECT MIX DESIGN PERCENTAGE ERRORS, CORRECTIONS MUST BE MANUALLY CALCULATED.

Adjustments Plug-in's Adj Process Submission Panel

The Adj Process Submission panel is used to initiate the adjustment process by clicking the Calc button on the toolbar after resolving all processing messages displayed in the window. After calculating adjustment, the following message displays:

INITIAL APPROVAL IS GIVEN FOR THE ESTIMATE; RETURNING ESTIMATE APPROVAL BACK TO PENDING ALSO DELETES ESTIMATE'S PRICE AND PAY ADJUSTMENTS IF THEY EXIST.

Exercise 14

In the following exercise, to complete the adjustments for a contract, enter the required information noted on the Adj Process Submission panel.

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 see the results of each step and to answer the questions.

First, let's verify that we've satisfied all of the required Adjustment Calculation Messages.

1. *Click the **Adj Process Submission** tab. The system displays the Adj Process Submission panel.*
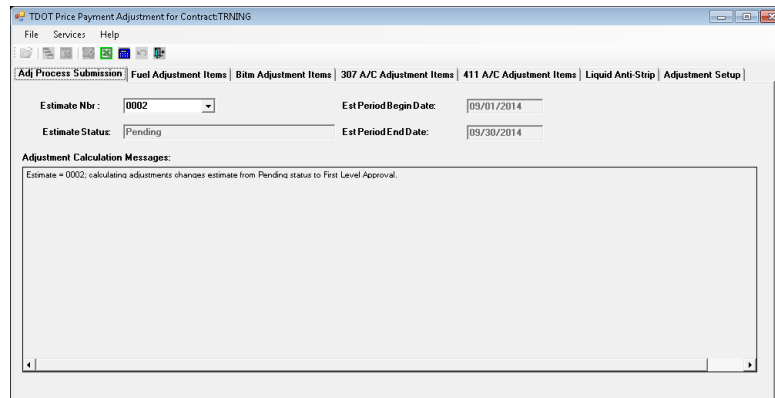
Figure 36. Adjustments Plug-in - Adjustment Process Submission Panel

2. *Have you addressed all required messages? _____*

Calculate the adjustments to the estimate.

3. *On the toolbar, click the **Calc** button. The system displays a message prompting for a confirmation.*
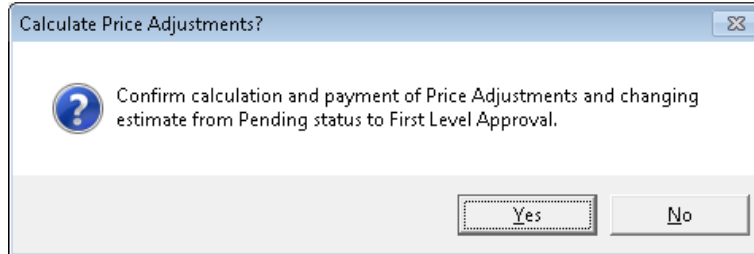
Figure 37. Adjustments Plug-in – Calculate Price Adjustments Prompt

4. *In the message, click **Yes**. The system creates a line item adjustment for the estimate on the contract and grants first level approval to the estimate.*
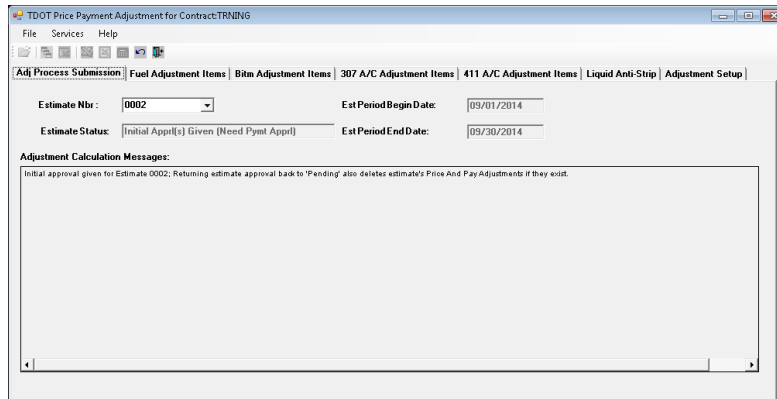
Figure 38. Adjustments Plug-in - Adjustment Process Submission Panel (After Clicking Calc Button)

Confirm the adjustments were applied to the estimate.

5. *Is there an Adjustment calculation message to indicate initial approval was given? _____*

You've completed the adjustments for the contract.

Adjustments Plug-in's Fuel Adjustment Items Panel

The Fuel Adjustment Items panel is a three focus window.

- The top panel is populated automatically by the plug-in and displays the adjustment item details, the Bidding Fuel Price field to display the contract level price of fuel for bidding, and the Bidding Index field to display the value for the entry immediately preceding the Contract's Price Adjustments Base Date.

- The middle panel is also automatically populated by the plug-in and displays the item details for the specified line item for the selected adjustment type for each project/category the item is associated with on the contract. The total adjustment amount for the project/category displays in the Dollar Amt/Placed Quantity field.

- The bottom panel is also automatically populated by the plug-in and displays the pay adjustments for fuel created for those items designated as fuel adjustment items on the Price Adjustment Maintenance Reference Table in SiteManager and installed during the estimate period. These adjustments will be recorded as a Line Item Adjustment.

> THE INDEX PERCENT CHANGE MUST BE 5% OR MORE BEFORE ADJUSTMENTS ARE MADE.

Exercise 15

In this exercise, view the fuel adjustment items.

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 see the results of each step and to answer the questions.

1. *Click the **Fuel Adjustment Items** tab. The system displays the Fuel Adjustment Items panel.*

Figure 39. Adjustments Plug-in - Fuel Adjustment Items Panel

2. *Were there any fuel adjustments made during this estimate period? _____*

You've viewed the fuel adjustment items.

Adjustments Plug-in's Bitm Adjustment Items Panel

The Bitm Adjustment Items panel is a three focus window.

- The top panel is populated automatically by the plug-in and displays the adjustment item details and the Base Index field to display the value for the entry immediately preceding the Contracts Price Adjustment Base Date.

- The middle panel is also automatically populated by the plug-in and displays the item details for the specified line item for the selected adjustment type for each project/category the item is associated with on the contract. The total adjustment amount for the project/category displays in the Dollar Amt/Placed Quantity field.

- The bottom panel is also automatically populated by the plug-in and displays the pay adjustments for bituminous materials created for those items designated as bituminous adjustment items on the Price Adjustment Maintenance Reference Table in SiteManager and installed during the estimate period. These adjustments will be recorded as a Line Item Adjustment.

THE INDEX PERCENT CHANGE MUST BE 5% OR MORE BEFORE ADJUSTMENTS ARE MADE.

IF AN APPLICABLE ITEM RESULTED IN A ZERO PAYMENT ADJUSTMENT AMOUNT BECAUSE THE MIX DESIGN WAS NOT ENTERED, ASTERISKS WILL BE PLACED IN THE APPLICABLE FIELD AND A MESSAGE WILL BE LISTED AT THE BOTTOM STATING WHY.

Exercise 16

In this exercise, view the bituminous adjustment items for a contract.

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 see the results of each step.

1. *Click the **Bitm Adjustment Items** tab. The system displays the Bitm Adjustment Items panel.*

Figure 40. Adjustments Plug-in - Bitm Adjustment Items Panel

2. *Were there any bituminous adjustments made during this estimate period? _____*

You've viewed the bituminous adjustment items.

Adjustments Plug-in's 307 A/C Adjustment Items Panel

The 307 A/C Adjustment Items panel has three panes:

- The top pane is populated automatically by the plug-in and displays the adjustment item details.

- The middle pane is also automatically populated by the plug-in and displays the item details for the specified line item for the selected adjustment type for each project/category the item is associated with on the contract. The total adjustment amount for the project/category displays in the Dollar Amt/Placed Quantity field.

- The bottom pane is also automatically populated by the plug-in and displays the pay adjustments for A/C Content for those items designated as 307 Mix items on the Price Adjustment Maintenance Reference Table in SiteManager and installed during the estimate period. These adjustments will be recorded as a Line Item Adjustment.

IF AN APPLICABLE ITEM RESULTED IN A ZERO PAYMENT ADJUSTMENT AMOUNT BECAUSE THE MIX DESIGN WAS NOT ENTERED, ASTERISKS WILL BE PLACED IN THE APPLICABLE FIELD AND A MESSAGE WILL BE LISTED AT THE BOTTOM STATING WHY.

Exercise 17

In this exercise, view the 307 asphalt content adjustment items for a contract.

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 see the results of each step and to answer the questions.

1. *Click the 307 A/C Adjustment Items tab. The system displays the 307 A/C Adjustment Items panel.*

Figure 41. Adjustments Plug-in - 307 A/C Adjustment Items Panel

2. *Were there any 307 A/C adjustments made during this estimate period? _____*

You've viewed the 307 asphalt content adjustment items.

Adjustments Plug-in's 411 A/C Adjustment Items Panel

The 411 A/C Adjustment Items panel has three panes.

- The top pane is populated automatically by the plug-in and displays the adjustment item details.

- The middle pane is also automatically populated by the plug-in and displays the item details for the specified line item for the selected adjustment type for each project/category the item is associated with on the contract. The total adjustment amount for the project/category displays in the Dollar Amt/Placed Quantity field.

- The bottom pane is also automatically populated by the plug-in and displays the pay adjustments for A/C Content created for those items designated as 411 Mix adjustment items on the Price Adjustment Maintenance Reference Table in SiteManager and installed during the estimate period. These adjustments will be recorded as a Line Item Adjustment.

IF AN APPLICABLE ITEM RESULTED IN A ZERO PAYMENT ADJUSTMENT AMOUNT BECAUSE THE MIX DESIGN WAS NOT ENTERED, ASTERISKS WILL BE PLACED IN THE APPLICABLE FIELD AND A MESSAGE WILL BE LISTED AT THE BOTTOM STATING WHY.

Exercise 18

In this exercise, view the 411 asphalt content adjustment items.

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 see the results of each step and to answer the questions.

1. *Click the **411 A/C Adjustment Items** tab. The system displays the 411 A/C Adjustment Items panel.*

Figure 42. Adjustments Plug-in - 411 A/C Adjustment Items Panel

2. *Were there any 411 A/C adjustments made during this estimate period? _____*

You've viewed the 411 asphalt content adjustment items.

Adjustments Plug-in's Liquid Anti-Strip Panel

The Anti-Strip Adjustment Item panel has three panes:

- The top pane is populated automatically by the plug-in and displays the adjustment item details.

- The middle pane is also automatically populated by the plug-in and displays the item details for the specified line item for the selected adjustment type for each project/category the item is associated with on the contract. The total adjustment amount for the project/category displays in the Dollar Amt/Placed Qty field.

- The bottom pane is also automatically populated by the plug-in and displays the pay adjustments for anti-strip created for those items where anti-strip quantities were entered in the Total Anti-Strip Gallons/Liters field within the SM39 DWR template.

IF AN APPLICABLE ITEM RESULTED IN A ZERO PAYMENT ADJUSTMENT AMOUNT BECAUSE THE INVOICE PRICE WAS NOT ENTERED, ASTERISKS WILL BE PLACED IN THE APPLICABLE FIELD AND A MESSAGE WILL BE LISTED AT THE BOTTOM STATING WHY.

Exercise 19

In this exercise, view the liquid anti-strip adjustment items.

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 see the results of each step.

1. *To prepare for the next exercise, click the **Liquid Anti-strip** tab. The system displays the Liquid Anti-strip panel.*

Figure 43. Adjustments Plug-in – Liquid Anti-strip Panel

2. *Were there any liquid anti-strip adjustments made during this estimate period? _____*

3. *To exit the plug-in, click **Exit**. The system closes the plug-in and displays the Contracts window.*

Prepare for the next exercise.

4. **Close**. The system closes the Contracts window and displays the Contract Records panel.

5. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've viewed the liquid anti-strip adjustment items.

Understanding the Estimate Review and Approve Workflow

The Office Staff will complete the following tasks as part of the estimate generation and review process.

Estimate Review and Approve Workflow Tasks	Functional Navigation
Using the Adjustment Plug-In, Office Staff will approve the completed estimate which places it in the first level of approval and contact the District Supervisor when the estimate is ready for the next approval level. Note: Do not approve estimate if estimate is Less than $1000, contact HQ Finance.	Contract Administration > Contract Records > Contracts > Attachments > Adjustment (plug-in)
District Supervisor will review the BOE report, *Estimate Summary to Contractor* (RR004) and the Estimate Discrepancy window to verify the estimate is correct. As needed, the District Supervisor will run any reports or view any other windows necessary to review item quantities.	Accessories > System Attachments > SM Reports (BOE reports) and Contractor Payments > Estimate Discrepancy, Various Contract Adjustments, Daily Work Reports, Contractor Payments, and BOE Reports
District Supervisor will approve or stop the estimate based on their review. To stop the estimate, the District Supervisor must notify the Office Staff person who generated the estimate. When stopped, an estimate will need to be evaluated and may need to be generated again. If changes are required, the Office Staff will follow the estimate correction procedures detailed in Table 8. 'TDOT Progress Estimate Correction Workflow' of this chapter.	Contractor Payments > Estimate > Estimate Approval
Office Staff / District Supervisor may track the status of the estimate.	Contractor Payments > Estimate > Estimate Tracking
Finance will approve or stop the estimate based on their review. To stop the estimate, Finance must notify the Office Staff person who generated the estimate. When stopped, an estimate will need to be evaluated and may need to be generated again.	Contractor Payments > Estimate > Estimate Approval
Finance will post the approved BOE report, *Estimate Summary to Contractor* (RR004), to the internet. Go to http://www.tn.gov/tdot/topic/transportation-construction-contractor-information and click Progress Payments.	Accessories > System Attachments > SM Reports (BOE reports)

OFFICE STAFF MAY USE ADJUSTMENT PLUG-IN TO RETURN THE ESTIMATE TO PENDING STATUS UNTIL HQ FINANCE OFFICE APPROVES THE ESTIMATE.

Table 7. Estimate Review and Approval Workflow

Viewing Line Item Adjustments

The Contract Line Item Adjustments window displays line item adjustments that are reflected in the final payable amount for the estimate. The top pane displays all the line items for which an adjustment is present. The bottom pane displays associated adjustment information. System-generated adjustments cannot be modified by a user.

Figure 44. Line Item Adjustments Window

THE LINE ITEM ADJUSTMENTS WINDOW IS ACCESSED TO VIEW THE LINE ITEM ADJUSTMENTS ENTERED BY THE SYSTEM.

LINE ITEM ADJUSTMENTS DISPLAYED WILL BE:
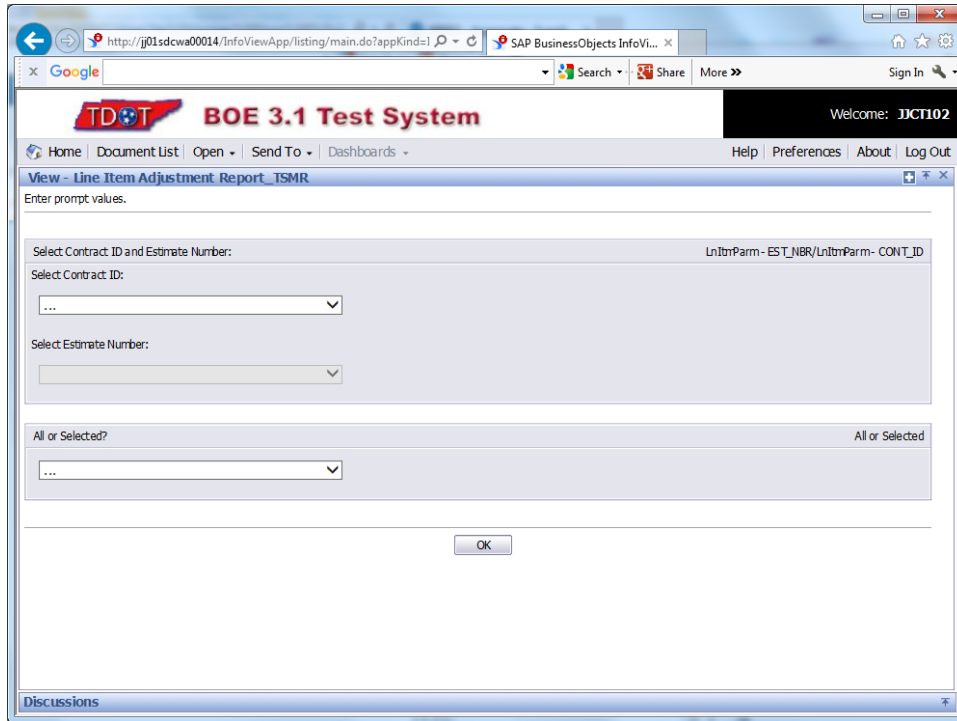
1. MATERIAL DISCREPANCY PAYMENT ADJUSTMENTS

2. STOCKPILED MATERIALS INITIAL PAYMENT

3. STOCKPILED MATERIALS ADJUSTMENTS

4. ADJUSTMENTS – FUEL, BITUMINOUS MATERIAL, 307 AC CONTENT, 411 AC CONTENT, AND ANTI-STRIP

5. THE REMARKS FIELD WILL SHOW ANY ITEMS THAT HAVE BEEN OVERRIDDEN BY WHOM AND HOW MUCH.

NOTE: A BOE REPORT, LINE ITEM ADJUSTMENT, IS ALSO AVAILABLE.

Viewing the Line Item Adjustment Report

The BOE report, *Line Item Adjustment*, lists all of the changes made to the original system calculated estimate per TDOT policies.

Navigation: Accessories > System Attachments > SM Reports (BOE reports)

Figure 45. BOE Report - Line Item Adjustment – Prompts

Figure 46. BOE Report - Line Item Adjustment

Exercise 20

In this exercise, view the line item adjustments.

User ID	**jj000029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356e**		

1. On the **Main Panel** panel, double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

2. Double-click the **Contract Adjustments** icon. The system displays the Contract Adjustments panel.

3. Double-click the **Line Item Adjustments** icon. The system displays the Select Contract and Estimate window.

4. In the **Contract** area, in the **Contract ID** column, double-click **TRN356e**.

5. In the **Estimate** area, in the **Estimate Number** column, double-click **0002**. The system displays the Line Item Adjustments window.

View an adjustment.

6. Scroll to and select the following row:

    Prj Nbr **67004-3213-14**, Catg Nbr **0100**,
    Line Item Number **0670**, Item Code **307-01.01**,
    Description **ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A**.

7. What is the amount of the adjustment for this item? _____

View another adjustment.

8. Scroll to and select the following row:

    Prj Nbr **67004-3213-14**, Catg Nbr **0100**,
    Line Item Number **9009**, Item Code **411-03.20**,
    Description **PRICE ADJUSTMENT FOR ASPHALT CEMENT CONTENT**.

9. What is the amount of the adjustment for this item? _____

Prepare for the next exercise.

10. **Close**. The system closes the Line Item Adjustments window and displays the Contract Adjustments panel.

11. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've viewed the line item adjustments.

Understanding the 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 <u>prior</u> to running the plug-ins to adjust the estimate:

Progress Estimate 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 8. 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.

IT IS CRITICAL THAT THE APPROPRIATE WORKFLOW IS FOLLOWED SO THAT THE PLUG-INS WILL CALCULATE ADJUSTMENTS PROPERLY.

ALWAYS GENERATE THE PENDING ESTIMATE AND ADDRESS ALL ISSUES AND DISCREPANCIES PRIOR TO CALCULATING PRICE ADJUSTMENTS WITH THE ADJUSTMENTS PLUG-IN.

REMEMBER THE ADJUSTMENTS PLUGIN WILL INDICATE YOU APPROVE OF THE ESTIMATE. IF AN ESTIMATE MUST BE DELETED AND GENERATED AGAIN, ALWAYS USE THE ADJUSTMENTS PLUG-IN TO PUT THE ESTIMATE BACK IN PENDING STATUS.

Viewing the Estimate Item Detail

The Estimate Item Detail window displays the item quantities from authorized DWRs.

Figure 47. Estimate Item Detail Window

Figure 48. Estimate Item Detail Window (Pending estimate with discrepancies)

THE OFFICE STAFF AND DISTRICT SUPERVISOR MAY VIEW THE ESTIMATE ITEM DETAIL WINDOW TO VERIFY THE ITEM QUANTITIES FOR PAYMENT ON THE ESTIMATE.

IF THERE IS NO PENDING OR REJECTED ESTIMATE FOR THE CONTRACT, YOU WILL SEE CUMULATIVE TOTALS FOR ALL ITEMS ON ESTIMATES.

 Exercise 21

In this exercise, view the Estimate Item Detail for an estimate on a contract.

User ID   **jj00029**   Password   **pass**
Connection   **Training Server**
Group Name   **FIELD – Office Staff [OSTAFF]**
Prior Keys   **TRN356e**; **0002** (estimate)

<div style="float:right; border:1px solid black; padding:4px; width:180px;">
THE ESTIMATE IS NO LONGER IN PENDING STATUS BECAUSE THE FIRST LEVEL OF APPROVAL WAS GIVEN BY THE PLUG IN. THE ESTIMATE IS NOW IN INAP STATUS.
</div>

1. On the **Main Panel** panel, double-click the **Contractor Payments** icon. The system displays the Contract Payments panel.

2. Double-click the **Estimate** icon. The system displays the Estimate panel.

3. 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.

4. To see items for all estimates, click **Yes**. 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.

Figure 49. Estimate Item Paybook Window

THE ESTIMATE ITEM PAYBOOK MAY BE USED TO CHECK AMOUNTS PAID ON EACH ESTIMATE FOR A PARTICULAR
ITEM.

Exercise 22

In this exercise, view the Estimate Item Paybook for an estimate on a contract.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356e**; **0002** (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 current 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.
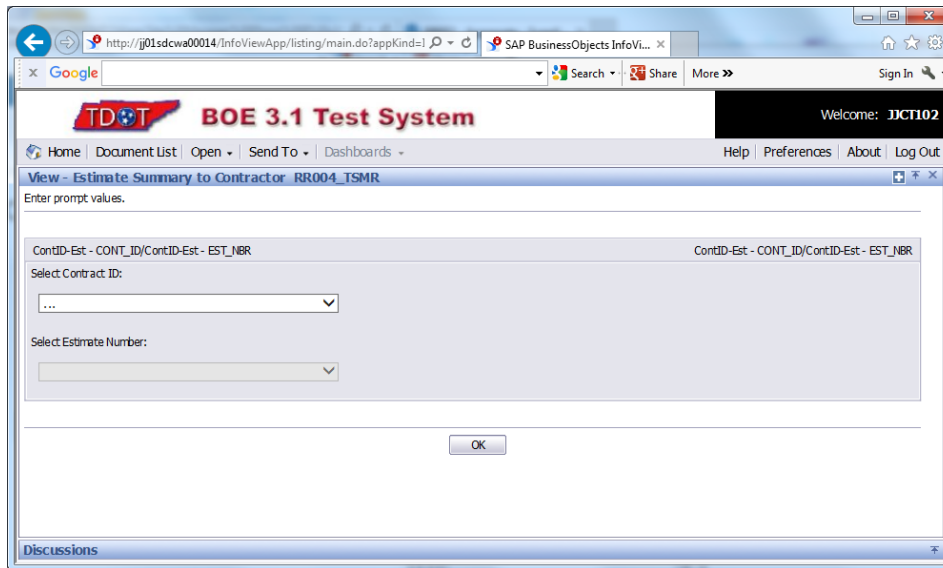
Navigation: Accessories > System Attachments > SM Reports (BOE reports)

Figure 50. BOE Report - Estimate Summary to Contractor - Prompts

Figure 51. BOE Report - Estimate Summary to Contractor [RR004] (initial page)

Figure 52. 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 23

In this exercise, view the BOE report, *Estimate Summary to Contractor,* for an estimate on a contract.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356e**; **0002** (estimate)		

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 51, what is the amount due to the contractor before adjustments on this estimate? _____*

2. *In Figure 51, are there any material discrepancies adjustments on this estimate? _____ .*

3. *In Figure 51, what is the amount of the material discrepancies adjustments on this estimate? _____*

4. *In Figure 51, are there any stockpile payments on this estimate? _____*

5. *In Figure 52, for line item number 0670, item code 307-01.01, what is the total quantity installed on this estimate? _____*

6. *In Figure 52, for line item number 0670, item code 307-01.01, what is the total quantity deducted? _____*

7. *In Figure 52, for line item number 0670, item code 307-01.01, what is the total amount for the material discrepancy adjustment? _____*

Prepare for the next exercise.
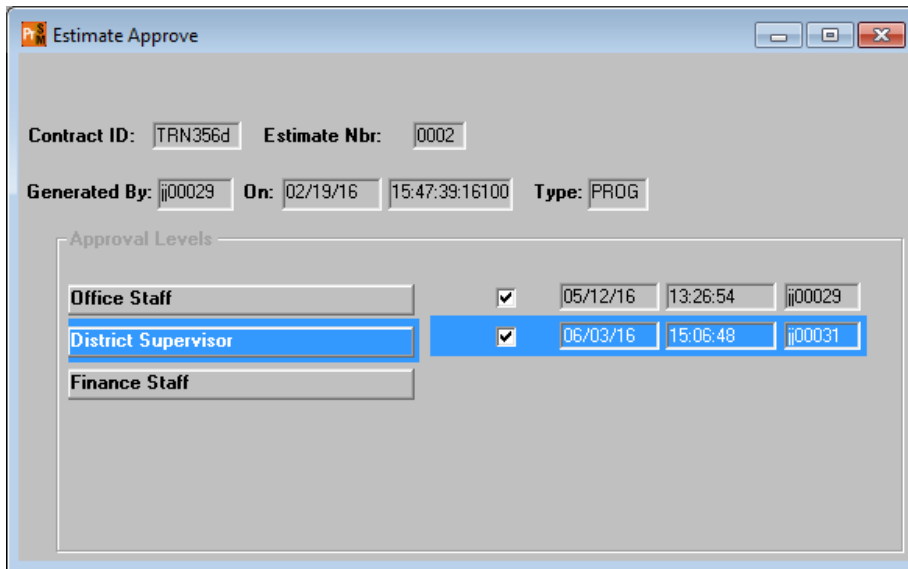
8. **Exit SiteManager**.

You've viewed the Estimate Summary to Contractor report.

Approving Estimates

The Estimate Approval window allows the authorized reviewers to approve all estimate types—progress, final, or supplemental. The approval process provides an audit trail and prepares the estimate for the creation of the extract file that is used by the Tennessee Department of Transportation's financial system. The approval process is conducted by a chain of approvals established during SiteManager installation or at contract setup. Each approval level corresponds to a user group within SiteManager.

The estimate is approved starting with the first level (Office Staff) and is completed with the last reviewer who indicates that the estimate is ready for payment. Once the last approval level has approved the estimate, a generic file layout is created which contains all payment information required by TDOT's financial system and available in SiteManager.

Figure 53. Estimate Approve Window

THE PROGRESS ESTIMATE IS APPROVED BY THE FOLLOWING PERSONNEL: OFFICE STAFF (APPROVAL GIVEN IN ADJUSTMENT PLUG-IN), DISTRICT SUPERVISOR, AND FINANCE STAFF

THE FINAL ESTIMATE AND SUPPLEMENTAL ESTIMATES ARE APPROVED BY THE FOLLOWING PERSONNEL: OFFICE STAFF, DISTRICT SUPERVISOR, REGIONAL DIRECTOR REP, FINANCE STAFF, DIRECTOR OF CONSTRUCTION

THE STANDARD TDOT ESTIMATE WORKFLOW IS:

1. GENERATE THE ESTIMATE

2. VERIFY AND FIX APPROPRIATE DISCREPANCIES

3. REGENERATE THE ESTIMATE, IF CORRECTIONS MADE TO MATERIAL DISCREPANCIES

4. OVERRIDE DISCREPANCIES, AS APPROPRIATE

5. RUN PRICE ADJUSTMENT PLUG IN

SINCE THE CALCULATION OF ADJUSTMENTS IN THE ADJUSTMENTS PLUG-IN ADDS THE FIRST LEVEL OF APPROVAL, OFFICE STAFF WILL NEVER USE THE ESTIMATE APPROVAL WINDOW. OTHER STAFF, (FOR EXAMPLE, DISTRICT SUPERVISORS) WILL USE THE ESTIMATE APPROVAL WINDOW.

PRIOR TO APPROVAL BY FINANCE STAFF, THE ESTIMATE MAY BE PLACED BACK TO PENDING STATUS FOR CORRECTIONS. ONCE THE ESTIMATE IS IN APPROVED STATUS (APPROVED BY FINANCE STAFF, THE ESTIMATE MAY NOT BE DELETED OR MODIFIED IN ANY WAY.

Exercise 24

ENSURE THIS IS UNDERSTOOD - ONCE ESTIMATE IS APPROVED AT FINAL LEVEL OF APPROVAL, IT MAY NOT BE DELETED OR MODIFIED.

In this exercise, log in as the second level approver of the estimate review the estimate amount, and approve an estimate for a contract.

User ID	**jj00031**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD - District Operations Supervisor [PJSUPS]**		

1. Start and log onto SiteManager as user **jj00031** *while connected in server mode.*

2. On the **Main Panel** panel, double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

3. Double-click the **Estimate** icon. The system displays the Estimate panel.

View the Estimate Summary window.

4. Double-click the **Estimate Summary** icon. The system displays the Estimate Summary window.

5. In the **Contract** area, scroll to and double-click **TRN356d**.

6. In the **Estimate** area, double-click **0002**.

7. What amount will be paid to the contractor? _____

8. **Close**. The system closes the Estimate Summary window and displays the Estimate panel.

View the overridden and unresolved discrepancies.

9. Double-click the **Estimate Discrepancy** icon. The system displays the Estimate Discrepancies window.

10. **Close**. The system closes the Estimate Discrepancies window and displays the Estimate panel.

DISCREPANCIES WITH AN UNRESOLVED STATUS MUST BE RESOLVED OR OVERRIDDEN PRIOR TO THE DISTRICT SUPERVISOR'S APPROVAL.

Approve the estimate on the District Supervisor level.

11. On the **Estimate** panel, double-click the **Estimate Approval** icon. The system displays the Select Contract/Estimate window.

12. In the **Contract ID** column, scroll to and double-click **TRN356d**.

13. For the **District Supervisor** level, select the **Approved** check box.

14. **Save**.

15. **Close**. The system displays a message to inform you that a notification was sent to the next approval level.

16. In the message, click **OK**. The system closes the window and displays the Estimate panel.

You've approved the estimate.

Tracking Estimates

The Estimate Tracking window is a view-only window that allows the tracking of Estimate generation, approval, and rejection. A user can access the window to determine where the Estimate is in the approval process.
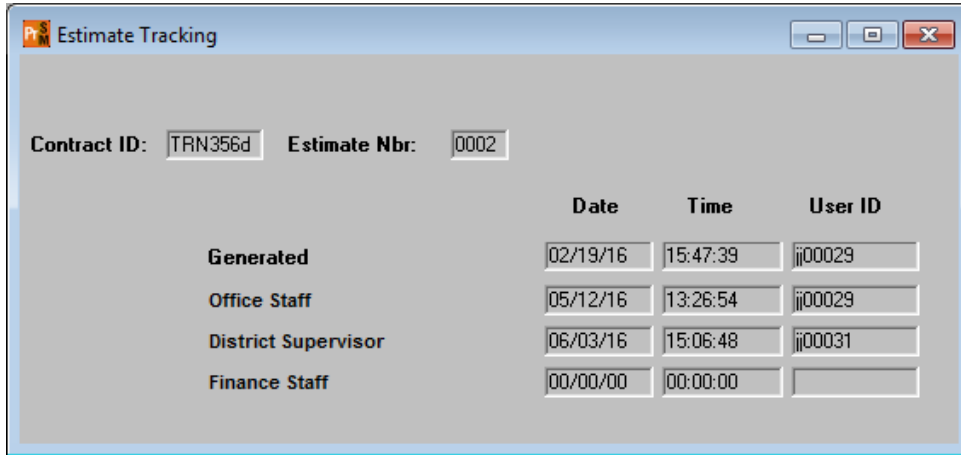
Figure 54. Estimate Tracking Window

USERS MAY ACCESS THIS WINDOW TO VIEW THE STATUS OF ESTIMATES ON THE CONTRACT.

   Exercise 25

In this exercise, track an estimate.

User ID	**jj00031**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD - District Operations Supervisor [PJSUPS]**		
Prior Keys	**TRN356d**; **0002** (estimate)		

1.   On the **Estimate** panel, double-click the **Estimate Tracking** icon. The system displays the Estimate Tracking window.

2.   What date was the estimate generated? _____

3.   Who generated the estimate? _____
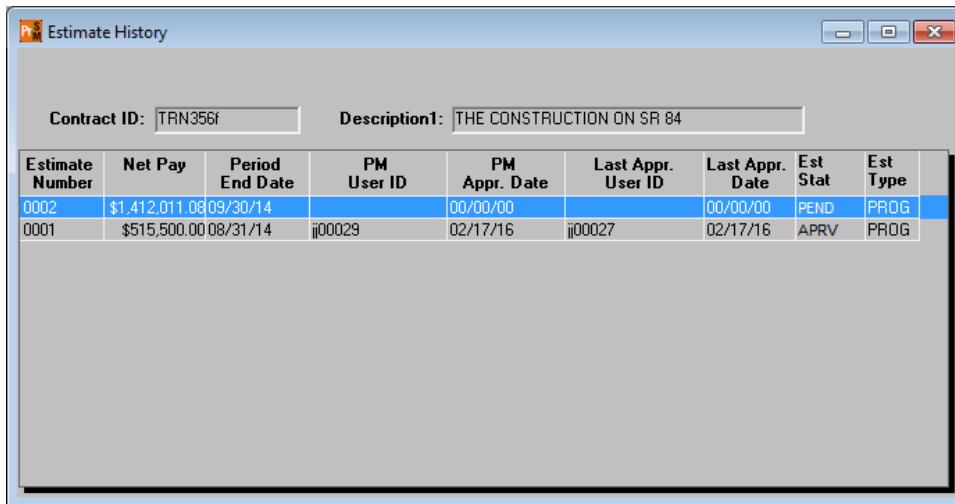
Now that you know who generated the estimate, if you wish to reject or stop the estimate, contact that person.

4.   **Exit SiteManager**.

You've tracked an estimate.

Viewing the Estimate History

The Estimate History window allows the selection and display of all estimates for a contract. Clicking the Open button displays the estimate number or the period end date of the estimate entered to define the starting row. The estimates will display from most recent to the oldest. The Estimate History window can also be used to navigate to the Estimate Summary and Estimate Discrepancy windows for an estimate using the Services menu.

Figure 55. Estimate History Window

THE OFFICE STAFF PERSONNEL WHO GENERATED THE ESTIMATE MAY DELETE A PENDING ESTIMATE IN THE ESTIMATE HISTORY WINDOW UNTIL THE ADJUSTMENT PLUG-IN HAS BEEN USED TO APPLY ADJUSTMENTS.

Exercise 26

In this exercise, log in and open the Estimate History window to view the status of an estimate for a contract that a District Supervisor wishes to stop.

User ID   **jj00029**   Password   **pass**
Connection   **Training Server**
Group Name   **FIELD – Office Staff [OSTAFF]**

1. Start and log onto SiteManager as user **jj00029** *while connected in server mode*.

Open the Estimate History window.

2. On the **Main Panel**, double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

3. Double-click the **Estimate** icon. The system displays the Estimate panel.

4. Double-click the **Estimate History** icon. The system displays the Contracts window.

5. In the **Contract ID** column, scroll to and double-click **TRN356f**. The system displays the Estimate History window.

6. What is the status of estimate **0002**? _____

7. What is the net pay for estimate **0002**? _____

8. **Close**. The system displays the Estimate panel.

You've viewed the Estimate History window.

Using the Estimate History Window to Delete a Pending Estimate

Users can also use the Estimate History window to delete a pending estimate.

IT IS CRITICAL THAT THE APPROPRIATE WORKFLOW IS FOLLOWED SO THAT THE ESTIMATE PLUG-IN WILL CALCULATE ADJUSTMENTS PROPERLY. ALWAYS GENERATE THE PENDING ESTIMATE AND ADDRESS ALL ISSUES PRIOR TO RUNNING THE PLUG-IN.

IF AN ESTIMATE MUST BE DELETED AND GENERATED AGAIN AFTER THE PLUG-IN IS RUN, ALWAYS USE THE RETURN TO PENDING BUTTON IN THE ADJUSTMENTS PLUG-IN TO RETURN THE ESTIMATE TO PENDING AND DELETE THE ADJUSTMENTS BEFORE DELETING THE ESTIMATE.

ONCE THE ESTIMATE IS IN APPROVED STATUS (HAVING HAD THE FINAL LEVEL APPROVAL GIVEN), IT MAY NOT BE DELETED OR MODIFIED IN ANY WAY.

AN UPCOMING SECTION WILL ADDRESS HOW TO ADJUST QUANTITIES ON AN APPROVED ESTIMATE.

Exercise 27

In this exercise, remove line item adjustments made by the Adjustments plug-in and delete an estimate for a contract.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356f**; **0002** (estimate)		

Undo adjustments and return the estimate to Pending status.

1. In the SiteManager Panel window, click the **Main Panel** tab. The system displays the Main Panel panel.

2. 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 **Contracts** icon. The system displays the Contracts window.

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

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 see the results of each step.

6. *In the **Name** column, double-click **Adjustments**. The system displays the Adjustments plug-in window.*

7. *On the toolbar, click the **Return to PEND** button. The system displays a message to confirm that you wish to return the estimate status to pending.*
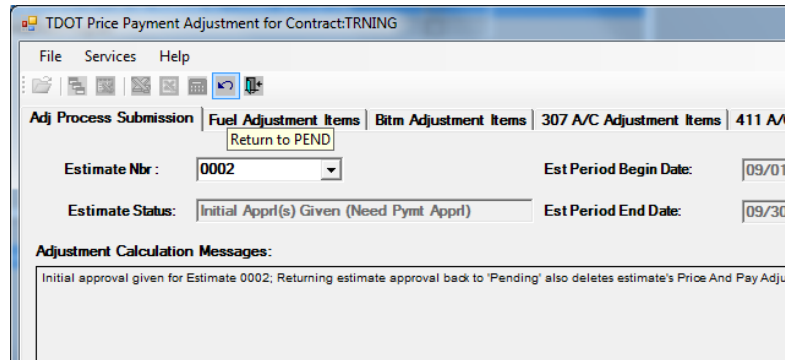
Figure 56. Adjustments Plug-in – Return to PEND Button (detail)

8. *In the message, click **Yes**. The system changes the estimate status to Pending and deletes the system-generated adjustments.*
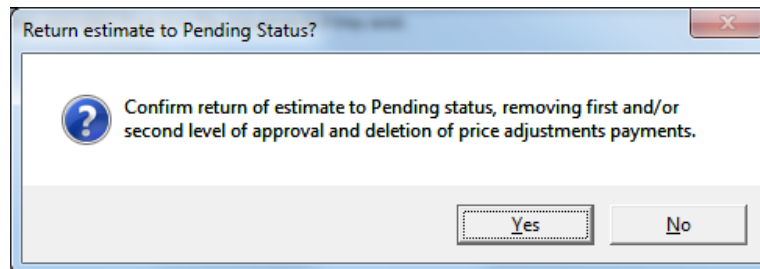
Figure 57. Adjustments Plug-in – Confirmation Message

9. *On the toolbar, click **Exit**.*

Delete the estimate.

10. Click **Close**. The system closes the Contracts window and displays the Contract Records panel.

11. Click the **Main Panel** tab. The system displays the **Main Panel** panel.

12. Double-click the **Contractor Payments** icon. The system displays the **Contractor Payments** panel.

13. Double-click the **Estimate** icon. The system displays the **Estimate** panel.

14. Double-click the **Estimate History** icon. The system displays the Estimate History window.

15. In the **Estimate Number** column, select **0002**.

16. What is the status of estimate **0002**? _____

17. In the **Net Pay** column, take note of the value.

    Note: In Production, the system will change the net pay by the value of the adjustments deleted when returning the estimate to Pending status.

18. On the toolbar, click the **Delete** button. The system displays a message to confirm that you wish to delete the estimate.

19. In the message, click **Yes**.

    At this time in the process, you may generate a replacement estimate, add additional DWRS, and make price and pay adjustments.

20. **Close**. The system closes the Estimate History window and displays the Estimate panel.

Prepare for the next exercise.

21. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've removed line item adjustments made by the Adjustments plug-in and deleted an estimate for a contract.

Understanding the Progress Status Window

After the progress estimate is approved, contracts that are 15% behind or more OR contracts that will not be complete by the Adjusted Completion Date (Original Completion Date, if no fully approved time extension change order exists) require additional information regarding project completion which must be entered in the Progress Status window. This data will be included on the monthly BOE report, *Progress*.

Figure 58. Progress Status Window

- ▪ **Estimated Completion Date:**

  If the contract completion date is anticipated to be later than the Adjusted (or Original, if no fully approved time extension change order exists) Completion Date, enter the new date into the Estimated Completion Date field.

  If you are filling out this window because the contract is 15% behind and the contract completion date is anticipated to be the same (or earlier) than the Adjusted (or Original, if no fully approved time extension change order exists) Completion Date, enter that same date into the Estimated Completion Date field.

- ▪ **Reason Code:**

  Select a Reason Code from the dropdown that best describes why this contract has a new Estimated Completion or why the contract is 15% behind schedule. A summary report is run at HQ monthly to categorize contracts based on the reason selected.

- ▪ **Reason Behind:**

  Enter the reason that this contract has a new Estimated Completion Date or why this contract is 15% or more behind schedule.

  Once all data entry is complete, designated representatives from the field office and/or region should run the BOE report, *Progress,* to review the data for accuracy. A statewide progress report is run monthly and distributed through the department which displays information based on these entries.

Exercise 28

In this exercise, complete the Progress Status window.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356f**		

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. The system displays the Contract Records panel.

3. Double-click the **Progress Status** icon. The system displays the Progress Status window.

Create a Progress Status record.

4. In **Estimate Completion Date** field, type **06/20/18**.

5. In the **Reason Code** dropdown list, select **Utilities Relocations**.

6. In the **Reason Behind** field, type **AT&T is not finished with relocating utility lines on SR 84.**

7. **Save**.

8. **Close**. The system closes the Progress Status window and displays the Contract Records panel.

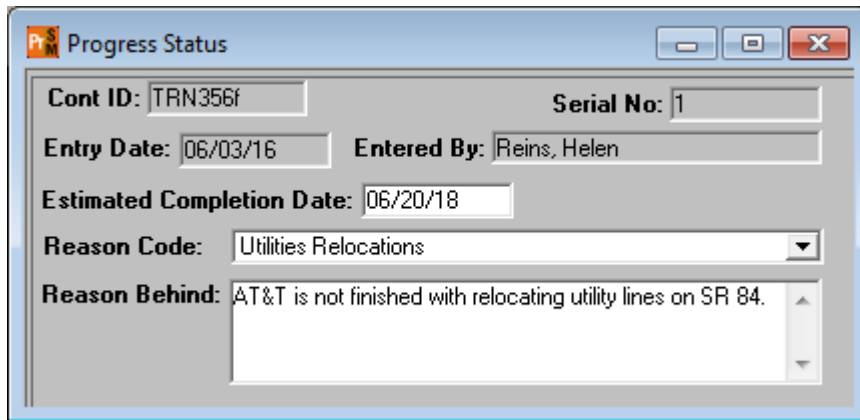Prepare for the next exercise.

9. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've created a progress status record.

Viewing the Progress Report

The BOE report, *Progress*, lists the contracts for the region(s)/offices(s) selected that are active and not yet complete. This report notes if each contract is on time and/or what percent it is behind.

Contracts will appear on the BOE report, *Progress,* upon activation by the Finance Office. Contracts will be removed from the BOE report, *Progress,* when the critical date, Contractor Final Release Date (the last day a claim can be submitted) has passed.

Navigation: Accessories > System Attachments > SM Reports (BOE reports)

Figure 59. BOE Report – Progress – Prompts

Figure 60. BOE Report – Progress (initial page)

Figure 61. BOE Report – Progress (subsequent page)

IT IS IMPORTANT THAT ALL COMPLETION DATA IS KEPT CURRENT. SITEMANAGER SHARES COMPLETION DATES WITH OTHER SYSTEMS IN THE DEPARTMENT. IN ADDITION, EXECUTIVE MANAGEMENT REVIEWS THE BOE PROGRESS REPORTS REGULARLY TO CHECK ON THE STATUS OF PROJECTS.

Exercise 29

In this exercise, review the BOE report, *Progress*.

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. *Review Figure 60 and Figure 61.*

2. *Which contracts are **15% or more** behind?*

   _____

3. *Do these contracts have a Reason Behind explanation?* ____

You've reviewed the BOE report, Progress.

Correcting Quantities Previously Paid on Estimates

Use the Quantity Correction plug-in to correct pay item quantities on Progress estimates that have reached final approval.

Figure 62. Quantity Adjustments Plug-In Window

The steps to use the Quantity Correction plug-in are as follows and are detailed on the following pages.

1. Run the Quantity Correction plug-in. (Main Panel > Contract Administration > Contracts > select Contract > click Attachments button > double-click Quantity Correction)

2. Select the DWR Date that included the quantity to be corrected.

3. Select the ITEM that included the quantity to be corrected.

4. In the Correct Quantity field, type the quantity that **should have been recorded** on the DWR.

5. Press the tab key to allow the program to calculate and display the quantity for the adjustment (Incorrect Quantity - Correct Quantity).

6. In the Remarks/Calculations field, type a remark to explain why the correction was needed.

7. Save.

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 30

In this exercise, use the Quantity Correction plug-in to adjust an incorrect quantity on an approved DWR on a fully approved estimate.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356f**		

Open the contract and Quantity Correction plug-in.

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. The system displays the Contract Records panel.

3. Double-click the **Contracts** icon. The system displays the Contracts window.

4. On the toolbar, click the **Attachments** icon.

Note: The remaining italicized steps cannot be completed in the training environment. The following steps and screen shots demonstrate the process steps.

5. *Double-click the **Qty Correction** plug-in. The system displays the Quantity Adjustments window with the contract and inspector automatically selected.*
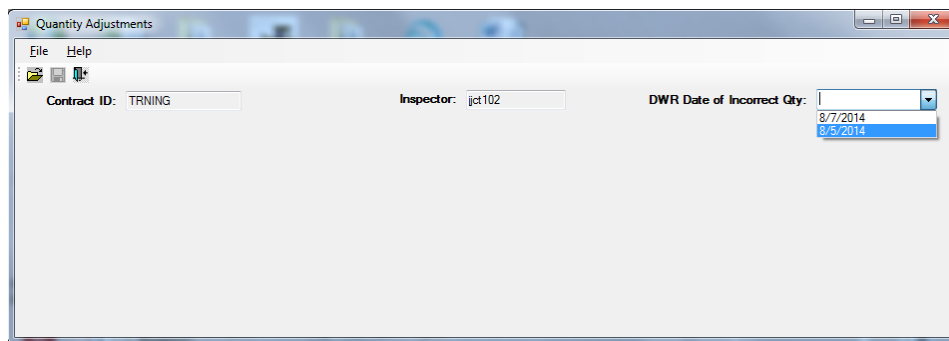
Figure 63. Quantity Adjustments Window

6. *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.*

Figure 64. Quantity Adjustments Window

7. *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.

Figure 65. Quantity Adjustments Window

8. *In the **Correct Quantity** field, type **0.400**.*

9. *On the keyboard, press the **Tab** key. The Quantity Correction plug-in shows the calculated adjustment in the Adjustment field.*

10. *In the **Remarks/Calculations** field, type **Corrected typo that resulted in an incorrect quantity being recorded**.*

11. **Save**. *The system displays a message to inform you that once saved, the correction is not editable.*
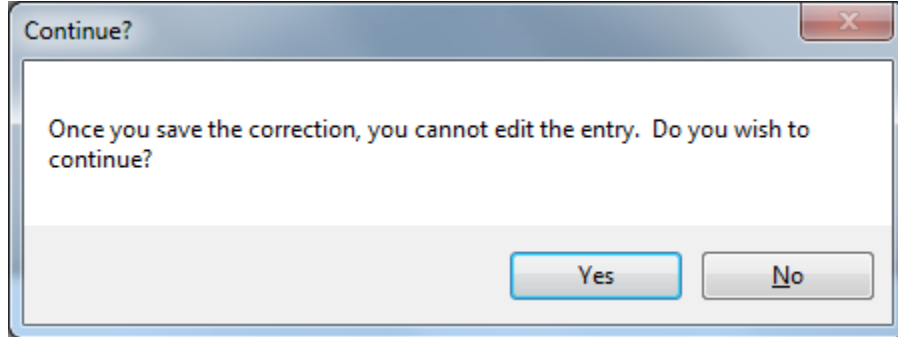
Figure 66. Continue? Window

12. *In the message, click* **Yes**.

13. *The system displays a message to inform you that a quantity has been adjusted for that line item number.*
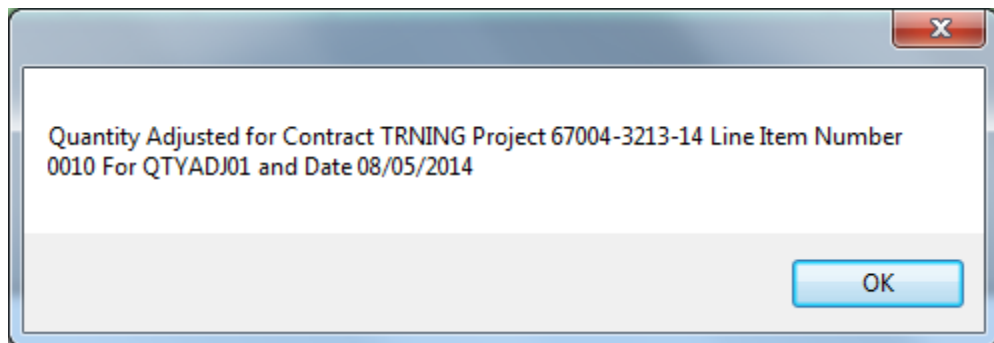
Figure 67. Untitled Message Window

14. *In the message, click* **OK**.

15. *On the toolbar, click* **Exit Application**.

Prepare for the next exercise.

16. To close the Contracts window, click **Close**. The system displays the Contract Records window.

17. 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.

Figure 68. Daily Work Reports Window

Exercise 31

In this exercise, view the DWR resulting from the Quantity Correction plug-in.

User ID	**jj00029**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN356f**		

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.

5. In the **Inspector** area, in the **User ID** column, double-click **QTYADJ1**.

6. 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.

7. In the message, click **OK**. The system displays the Daily Work Reports window.

View the installed work item.

8. Click the **Work Items** tab. The system displays the Work Items panel.

9. 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**.

10. What is the placed quantity? _____

View the remark.

11. On the toolbar, click the **Remarks** button. The system displays the Remarks window.

12. View the remark.

13. To close the Remarks window, click the **Remarks** button again. The system closes the Remarks window.

You've viewed the DWR resulting from the Qty Correction plug-in.

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 generate a progress estimate:

1. On the **Contractor Payments** panel, double-click the **Estimate** icon.

2. On the **Estimate** panel, double-click the **Generate Estimate** icon.

3. Scroll to and click the desired contract.

4. Click **OK**.

5. If desired, on the calendar, click the end date.

6. Click the **Generate Estimate** button.

7. If the estimate already exists for this generation period, and you want to delete it, click **YES**.

8. Click **OK**.

9. Click **OK**.

To open the Estimate Summary window:

1. On the **Contractor Payments** panel, double-click the **Estimate** icon.

2. On the **Estimate** panel, double-click the **Estimate Summary icon**.

3. On the Select Contract and Estimate window, in the **Contract** area, scroll to and click the desired contract.

4. In the **Estimate** area, scroll to and click the desired estimate.

5. Click **OK**.

To open the Estimate Discrepancies window:

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon.

2. On the **Select Contract and Estimate** window, in the list box, scroll to and double-click the desired contract.

3. In the list box, scroll to and click the desired estimate.

4. Click **OK**.

To navigate to the correct window to resolve the discrepancy:

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon.

2. On the Select Contract and Estimate window, scroll to and double-click the desired contract.

3. Scroll to and click the desired estimate.

4. Click **OK**.

5. Click the discrepancy to be resolved.

6. Click the **Navigation** button.

7. Make the necessary changes.

8. **Save**.

To override estimate discrepancies:

1. On the Estimate Discrepancies window, click the discrepancy to be overridden.

2. In the **Status** dropdown list, for the current selection, select **Override**.

3. Add remarks and click the **Remarks** button.

4. Repeat steps 1-3 to override additional discrepancies.

5. **Save**.

To recalculate estimate discrepancies:

1. Resolve the discrepancies of the estimate.

2. On the **Estimate** panel, double-click the Estimate Discrepancy icon.

3. Open the estimate to be recalculated.

4. On the **Services** menu, select **Recalculate Discrepancies**.

5. Click **YES**.

6. Click **OK**.

To open the Adjustments plug-in:

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

2. On the **Contract Administration** panel, double-click the **Contracts Records** icon.

3. On the **Contract Records** panel, double-click the **Contracts** icon.

4. On the Select Contract window, select the contract.

5. On the toolbar, click the **Attachments** button.

6. Double-click **Adjustments**.

To make adjustments with the Adjustments plug-in:

1. Open the **Adjustments** plug-in.

2. On the **Adj. Process Submission** panel of the TDOT Price Adjustments window, review messages for the estimate adjustments.

3. On the **Adjustment Setup** panel, enter **Mix Design (DA)** and **Recycled Asphalt (RA)** percentages and dates for the pay items included in the estimate and listed.

4. On the **Adj. Process Submission** panel of the TDOT Price Adjustments window, confirm all messages have been satisfied for the estimate adjustments.

5. On the **Adj. Process Submission** panel, click the **Calc.** button to generate adjustments to the estimate and provide first level approval of the estimate.

6. On the **Fuel Adjustment Items, Bitm Adjustment Items, 307 A/C Adjustment Items, 411 A/C Adjustment Items** and **Liquid Anti-strip** panels, view adjustments made by the system.

To view a Line Item Adjustment:

1. On the Contractor Payments panel, double-click the Contract Adjustments icon.

2. On the **Contract Adjustments** panel, double-click the **Line Item Adjustments** icon.

3. On the Select Contract and Estimate window, in the list box, scroll to and double-click the desired contract.

4. In the list box, scroll to and click the desired estimate.

5. Click **OK**.

To view an estimate item:

1. On the **Estimate** panel, double-click the **Estimate Item Detail** icon.

2. On the Contract window, in the **Contract** area, scroll to and click the desired contract.

3. Click **OK**.

4. On the **Services** menu, select **View Estimate**.

To view the Estimate Item Paybook:

1. On the **Contractor Payments** panel, double-click the **Estimate** icon.

2. On the **Estimate** panel, double-click the **Estimate Item Paybook** icon.

3. On the Select Contract and Line Item window, in the list box, scroll to and double-click the desired contract.

4. In the list box, scroll to and double-click the desired line item.

To approve an estimate:

1. On the **Estimate** panel, Double-click the **Estimate Approval** icon.

2. In the list box, scroll to and click the desired record.

3. Click the **Approved** check box (ON) for your level.

4. Click **Ok**.

5. Click the **Save** button.

6. When complete, click the **Close** button.

To track an estimate:

1. On the **Estimate** panel, double-click the **Estimate Tracking** icon.

2. Click the **Open** button.

3. In the list box, scroll to and click the desired record.

To view an estimate history:

1. On the **Estimate** panel, double-click the **Estimate History** icon.

2. In the list box, scroll to and click the desired Contract and estimate number.

3. Click **OK**.

4. When through, click the **Close** button.

To put an estimate in pending status using the Adjustment plug-in after the first level of approval:

1. Open the **Adjustments** plug-in.

2. On the toolbar, click the **Return to PEND** button. The Adjustments program displays a message to confirm that you wish to return the estimate status to Pending.

3. In the message, click the **Yes** button. The Adjustments program changes the estimate status to Pending and deletes the system-generated adjustments.

To open the Quantity Correction program:

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

2. On the **Contract Administration** panel, double-click the **Contracts Records** icon.

3. On the **Contract Records** panel, double-click the **Contracts** icon.

4. On the Select Contract window, select the contract.

5. Click the **Attachments** button on the toolbar.

6. Double-click the **Quantity Correction Program**.

To correct an item quantity on a paid estimate using the Quantity Correction program (plug-in):

1. Open the **Quantity Correction Program**.

2. Select the DWR date that included the quantity to be corrected.

3. Select the item that included the quantity to be corrected.

4. In the **Correct Quantity** field, type the quantity that should have been recorded on the DWR.

5. On the keyboard, press the **Tab** key to allow the program to calculate and display the quantity for the adjustment (Incorrect Quantity - Correct Quantity).

6. In the **Remarks/Calculations** field, type a remark to explain why the correction was needed.

7. **Save**.

To view a Quantity Correction DWR:

1. On the **Main Panel,** double-click the **Daily Work Reports** icon.

2. On the **Daily Work Report**s panel, double-click the **Daily Work Reports** icon. SiteManager displays the Daily Work Reports window.

3. On the toolbar, click the **Open** button. The system displays the Contract ID window.

4. In the **Contract ID** area, scroll to and double-click the desired contract ID.

5. In the **Inspector** area, double-click **QTYADJ1.**

6. In the **Date** area, double-click the date. The system displays a message to inform you that the DWR will be opened in a read-only format.

7. In the message, click the **OK** button. The system displays the Daily Work Reports window.

8. Click the **Work Items** tab.

9. Double-click the row for the corrected item.

Review Exercise

In this exercise, perform the estimate process activities for a contract.

User ID   **jj00029**   Password   **pass**
Connection   **Training Server**
Group Name   **FIELD – Office Staff [OSTAFF]**

1. In Figure 5, does the BOE report, *DWR Template*, show any DWRs not authorized for inclusion on the next estimate? _____

2. Navigate to the Estimate Summary window for contract **TRN370c** estimate **0002**.

3. What are the item earnings for estimate **0002**? _____

4. Are there discrepancies on estimate **0002**? _____

5. Navigate to the Estimate Discrepancy window.

6. What types of discrepancies exist on this estimate?
   _____

7. From the Estimate Discrepancy window, navigate to the Checklist Event Dates window and resolve the discrepancies caused by the missed checklist event.

8. Enter **09/05/14** as the actual date for the **Prompt Payment to Subcontractor** event type due on **09/01/14**.

9. Close the Checklist Event Dates window.

10. Recalculate the estimate discrepancies.

11. How many discrepancies are now on estimate **0002**? __

12. Navigate to the Line Item Adjustment window for contract **TRN370c** estimate **0002**.

13. How many adjustments have been applied to estimate **0002**? __

14. Navigate to the Estimate Item Detail window.

15. 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.

16. What quantity was installed to date? _____

17. **Exit SiteManager**.

Additional Reports

The following reports will be used at various times:

- *Contract Items to Material Codes*

- *Samples by Status*

- *Installed Work (Unpaid Installed Quantity Summary)*

- *Installed Work Items*

Viewing the Contract Items to Material Codes Report

BOE report, *Contract Items to Material Codes*, is used to find the new material code associated to a contract line item.

Navigation: Accessories > System Attachments > SM Reports (BOE reports)
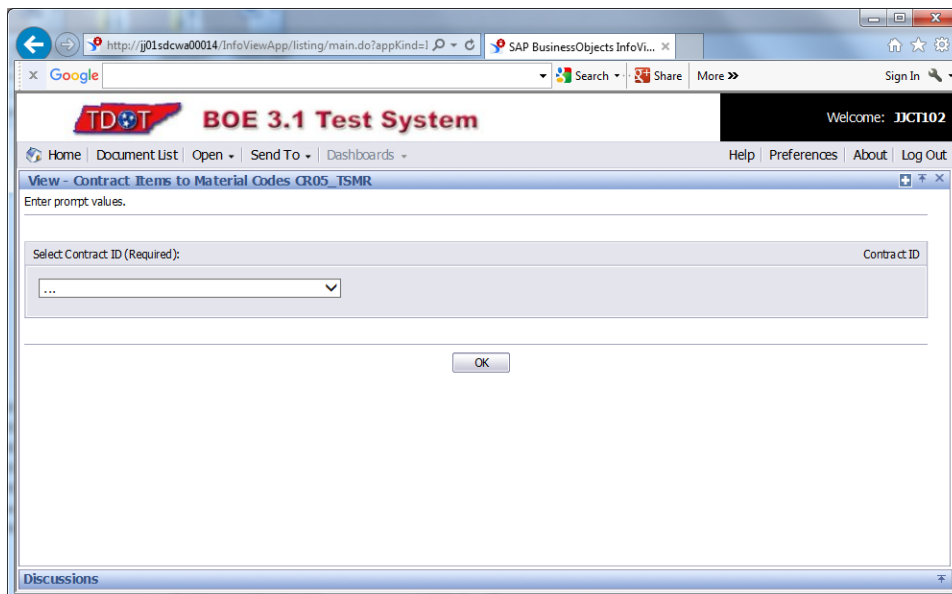
Figure 69. BOE Report - Contract Items to Material Codes – Prompts

STATE OF TENNESSEE
DEPARTMENT OF TRANSPORTATION
Contract Items to Material Codes

Contract ID: TRNING
Project: 67004-3213-14

Item Code	Line Item Number	Item Description	Item Unit	Material Code	Material Full Name	Acceptance Method	Sample Type
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) (BPMB-HM) GRADING A	TON	307.03.001	307-A Bit PM Base, PG 64-22	ACPT	ACCP
307-01.03	0690	AGGREGATE (BPMB-HM) 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) (BPMB-HM) GRADING B-M2	TON	307.03.026	307-BM2 Bit PM Base, PG 64-22	ACPT	ACCP
307-02.01	0710	ASPHALT CONCRETE MIX (PG70-22) (BPMB-HM) GRADING A	TON	307.03.003	307-A Bit PM Base, PG 70-22	ACPT	ACCP
307-02.03	0730	AGGREGATE (BPMB-HM) 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) (BPMB-HM) 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	0760	BITUMINOUS MATERIAL FOR PRIME COAT (PC)	TON	904.03.006	Emulsion (Asphalt Prime AE-P)	VERI	VERF
403-01	0780	BITUMINOUS MATERIAL FOR TACK COAT (TC)	TON	904.03.005	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
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.SBR	T2 Steel Bar Reinforcement	CERT	CERT
604-02.03	2580	EPOXY COATED REINFORCING STEEL	LB.	T2.EPOXY	T2 Epoxy Coated Steel Bar Reinforcement	CERT	CERT
604-03.01	2590	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.SBR	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.	907.01.003	Steel (Reinforcing)	VERI	VERF
	2610	PAVEMENT @ BRIDGE ENDS	S.Y.	908.01.001	Steel (Structural)	ACPT	ACCP
	2610	PAVEMENT @ BRIDGE ENDS	S.Y.	T2.604	T2 Concrete Structure	CERT	CERT
	2610	PAVEMENT @ BRIDGE ENDS	S.Y.	T2.604.3	T2 Joint Seal Material	CERT	CERT
	2610	PAVEMENT @ BRIDGE ENDS	S.Y.	T2.SBR	T2 Steel Bar Reinforcement	CERT	CERT
604-03.09	2620	CLASS D CONCRETE (BRIDGE DECK)	C.Y.	604.01.001D	Class D, Concrete Mix	ACPT	ACCP

Page: 2

Figure 70. BOE Report - Contract Items to Material Codes

Viewing the Samples by Status Report

BOE report, *Samples by Status*, is used to find samples using the many prompts provided. Three prompts are required, but the rest are optional so you can enter the information that you know.

Navigation: Accessories > System Attachments > SM Reports (BOE reports)

Prompt choices include: sample dates, sample status, sample type, contract, lab unit, producer/supplier, region/county name, material category, material, sampler/tester and authorized dates
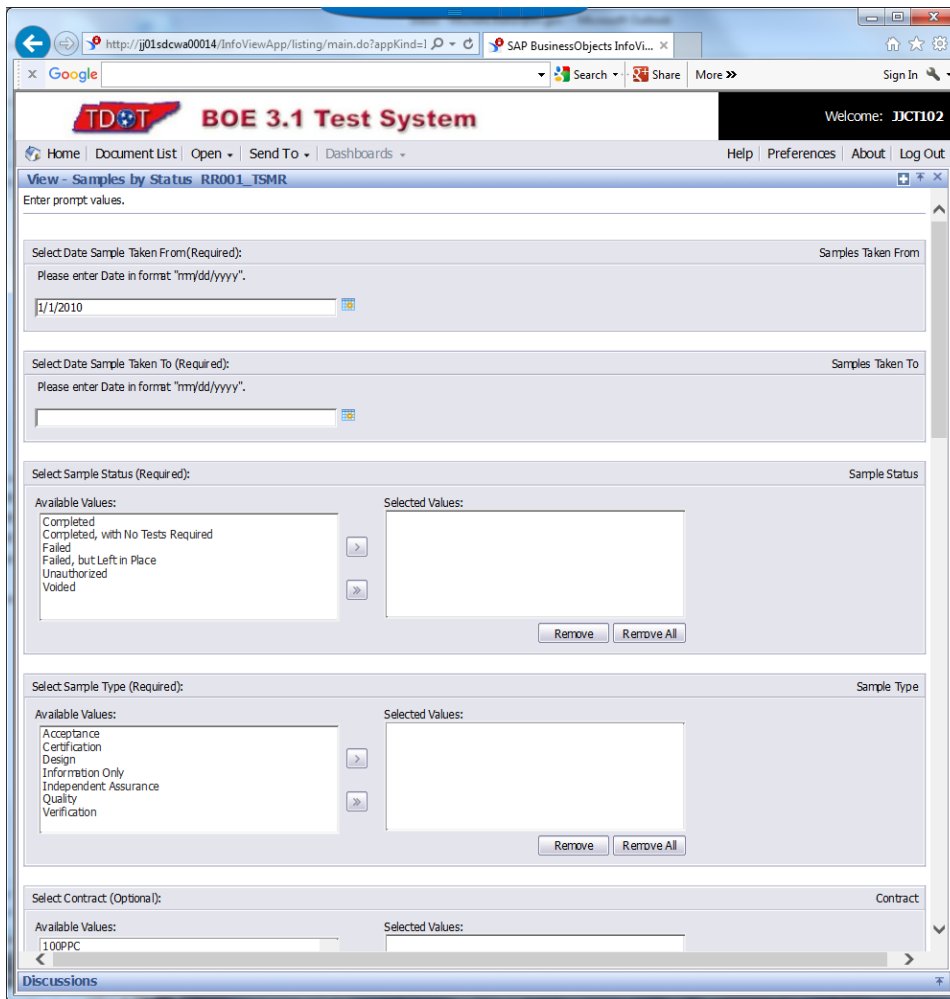
Figure 71. BOE Report - Samples by Status (RR001) - Prompts (part 1 of 4)
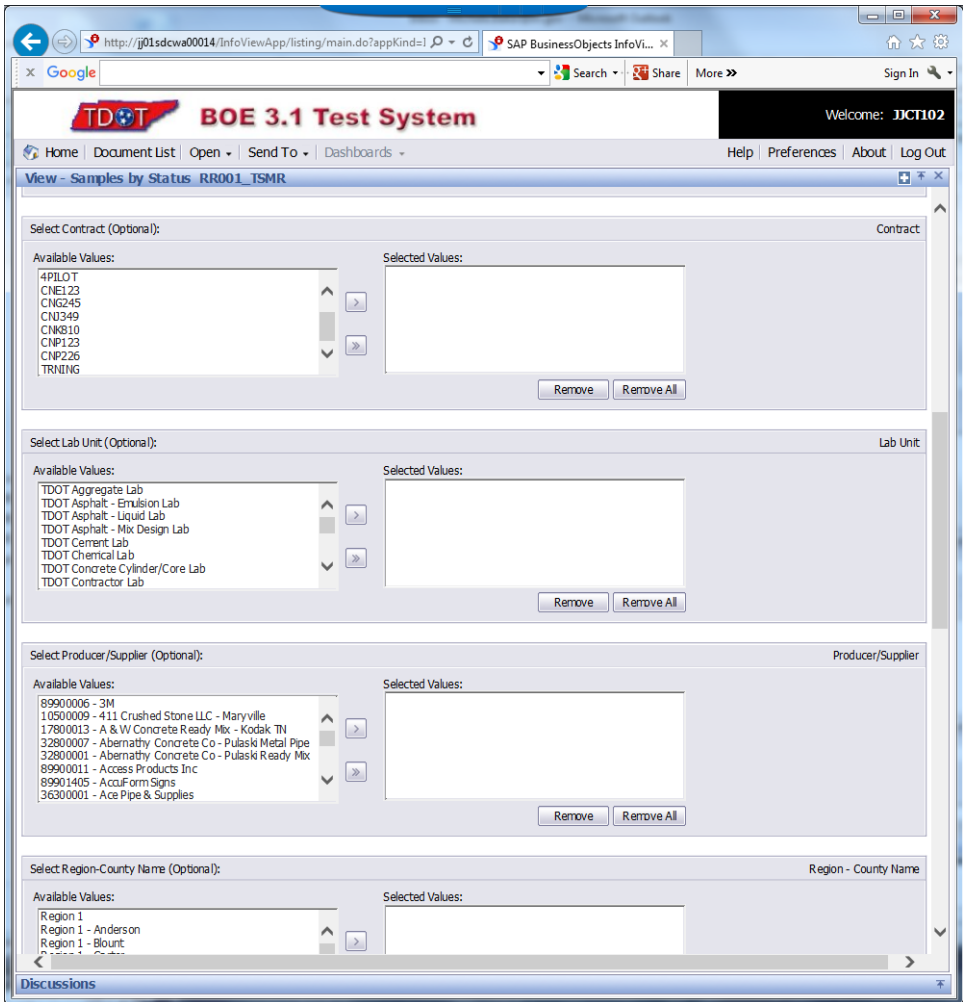
Figure 72. BOE Report - Samples by Status (RR001) - Prompts (part 2 of 4)
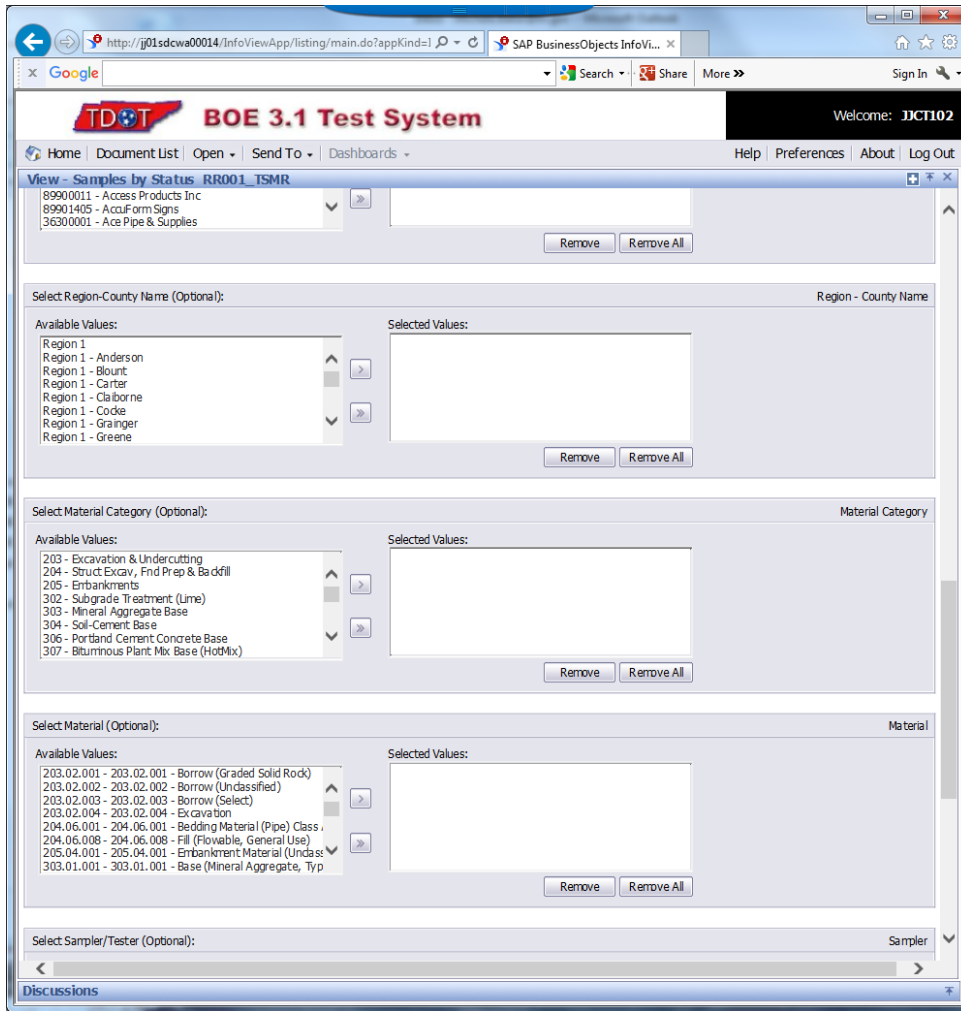
Figure 73. BOE Report - Samples by Status (RR001) - Prompts (part 3 of 4)
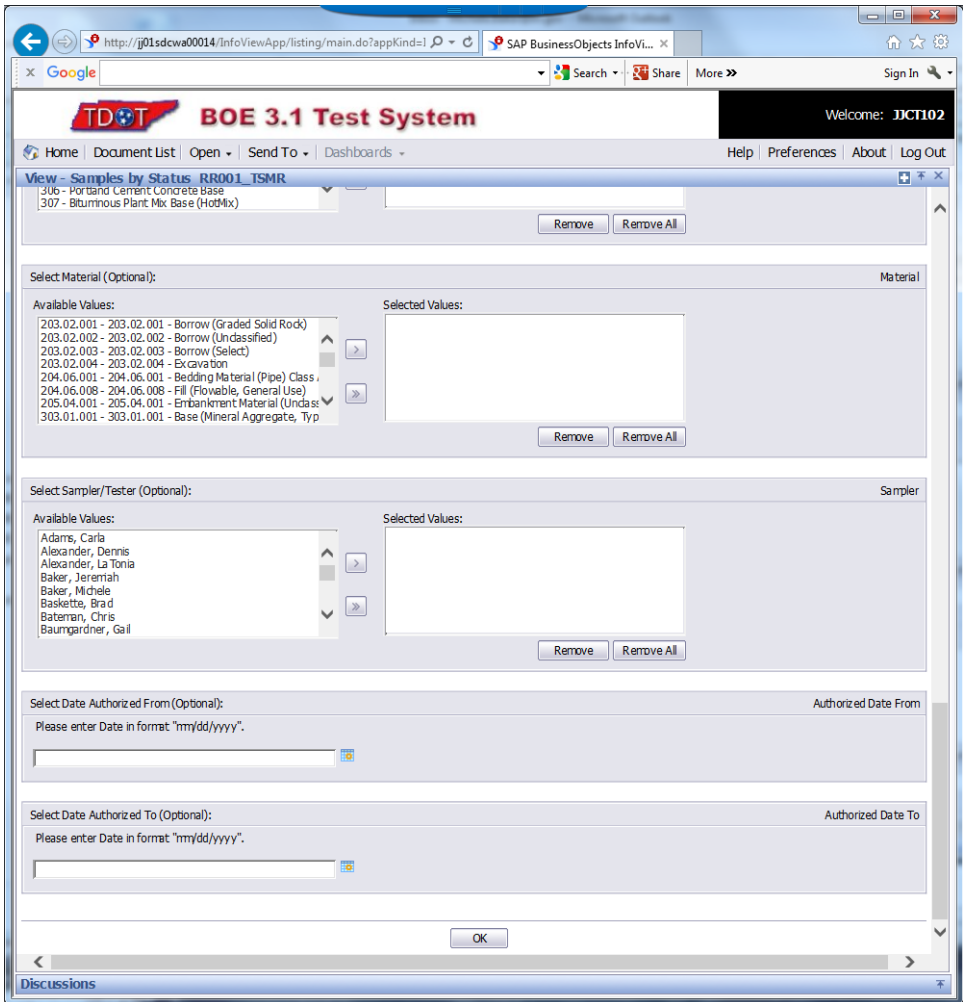
Figure 74. BOE Report - Samples by Status (RR001) - Prompts (part 4 of 4)

Figure 75. BOE Report - Samples by Status (RR001) (initial page)

Figure 76. BOE Report - Samples by Status (RR001) (final page)

Viewing the Installed Work (Unpaid Installed Quantity Summary) Report

Standard system report, *Installed Work*, lists all installed quantities not yet tied to an estimate.

Navigation: Contractor Payments > Reports > Installed Work

Figure 77. System Report - Installed Work (Unpaid Installed Quantity Summary)

Viewing the Installed Work Items Report

BOE report, *Installed Work Items*, lists all installed items for the selected contract. The final page of the report lists all items that have zero installed quantities.

Navigation: Accessories > System Attachments > SM Reports (BOE reports)

Figure 78. BOE Report - Installed Work Items - Prompts

TENNESSEE DEPARTMENT OF TRANSPORTATION
SITEMANAGER
Installed Work Items Report

Report Beginning Date: 1/1/1980   Report Ending Date: 2/26/2016

Contract:	TRNING	Project Number: 67004-3213-14	Category #: 0100		
Line Item:	0630		Bid Qty:	123,731.00	Current Contract Qty:	123,731.00
Item Code:	303-01		Qty Reported:	354.87	Line Item Adj. To Date:	0.00
Units Type:	TON		Qty Auth:	354.87	Qty Unauthorized To Date:	0.00
Item Desc.:	MINERAL AGGREGATE, TYPE A BASE, GRADING D		Qty Paid:	354.87	Qty Unpaid To Date:	0.00

DWR Date	Loc Seq #	Location	From Station	To Station	Templt ID	Placed Qty	Remarks	Auth	Est#	Inspector
9/12/2014	1	Test	+0.00 0.00	+0.00	SM39	354.870		Y	0002	Baker, Michele

Contract:	TRNING	Project Number: 67004-3213-14	Category #: 0100		
Line Item:	0670		Bid Qty:	11,179.00	Current Contract Qty:	11,179.00
Item Code:	307-01.01		Qty Reported:	1,400.00	Line Item Adj. To Date:	0.00
Units Type:	TON		Qty Auth:	1,400.00	Qty Unauthorized To Date:	0.00
Item Desc.:	ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A		Qty Paid:	1,400.00	Qty Unpaid To Date:	0.00

DWR Date	Loc Seq #	Location	From Station	To Station	Templt ID	Placed Qty	Remarks	Auth	Est#	Inspector
9/8/2014	1	lane 1	+0.00 0.00	+0.00	SM39	1,400.000		Y	0002	Baker, Michele

Contract:	TRNING	Project Number: 67004-3213-14	Category #: 0100		
Line Item:	0700		Bid Qty:	10,043.00	Current Contract Qty:	10,043.00
Item Code:	307-01.08		Qty Reported:	929.00	Line Item Adj. To Date:	0.00
Units Type:	TON		Qty Auth:	929.00	Qty Unauthorized To Date:	0.00
Item Desc.:	ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING B-M2		Qty Paid:	929.00	Qty Unpaid To Date:	0.00

DWR Date	Loc Seq #	Location	From Station	To Station	Templt ID	Placed Qty	Remarks	Auth	Est#	Inspector
9/8/2014	1	lane 2	+0.00 0.00	+0.00	SM39	929.000		Y	0002	Baker, Michele

Page: 1

Figure 79. BOE Report - Installed Work Items (initial page)

TENNESSEE DEPARTMENT OF TRANSPORTATION
SITEMANAGER
Installed Work Items Report

Report Beginning Date: 1/1/1980   Report Ending Date: 2/26/2016

Zero Qty Installed Items

Project: 67004-3213-14

Line Item	Item Code	Item Units	Item Desc	Bid Qty
9024	109-01.01	DOLL	PAY ADJUSTMENT FOR FUEL	0.00
9025	109-01.02	DOLL	PAYMENT ADJUSTMENT FOR BITUMINOUS MATERIAL.	0.00
0020	109-10.01	HOUR	TRAINEE	3,280.00
0030	201-01	LS	CLEARING AND GRUBBING	1.00
0040	202-01	LS	REMOVAL OF STRUCTURES AND OBSTRUCTIONS	1.00
0050	202-02.01	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	81.00
0060	202-02.02	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	21.00
0070	202-02.03	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	29.00
0080	202-02.04	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	32.00
0090	202-02.05	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	28.00
0100	202-02.06	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	24.00
0110	202-02.07	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	60.00
0120	202-02.08	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	41.00
0130	202-02.09	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	37.00
0140	202-02.10	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	40.00
0150	202-02.11	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	20.00
0160	202-02.12	L.F.	REMOVAL OF PIPE (SIZE ,STA.)	60.00
0170	202-03.01	S.Y.	REMOVAL OF ASPHALT PAVEMENT	4,620.00
0180	202-06.01	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0190	202-06.02	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0200	202-06.03	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0210	202-06.04	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0220	202-06.05	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0230	202-06.06	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0240	202-06.07	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0250	202-06.08	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0260	202-06.09	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0270	202-06.10	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0280	202-06.11	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0290	202-06.12	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0300	202-06.13	LS	REMOVAL OF BUILDINGS (TRACT NO.)	1.00
0305	202-13	EACH	WATER WELL ABANDONMENT	2.00

Page: 3

Figure 80. BOE Report - Installed Work Items (subsequent page)

Creating Disputes/Claims (Contract Change Requests) and Correspondence Logs for Office Documentation

In this chapter, receive instruction about the following:

Documenting and Tracking Contract Change Requests

Use the Disputes/Claims window to create a record for each Contract Change Request occurrence. In conjunction with the Disputes/Claims window, use the Correspondence Log window to attach and track all correspondence in relation to the request.

Creating Disputes/Claims

Use the Disputes/Claims window to capture data when conditions arise on a project that may require a change to the contract. Upon written detailed notification from the contractor providing information required in Section 104.03 of the Standard Specifications, create a dispute/claim for each contract change request occurrence in SiteManager including the following:

- **Contractor Written Notification Date** - Date the written detailed notification is received providing the information required in Numbers 1, 2 and 3 of Section 104.03 A.

- **Change Type** - Select the appropriate type based on Section 104.02:

    - Differing Site Conditions

    - Suspension of Work by Engineer

    - Change in Character of Work

    - Extra Work

    - Eliminate Items

- **Status** - Select the appropriate status based on Section 104.03, 109.04 or 105.16 and as the change request progresses.

- **Status Date** - Update each time the Status changes.

- **Request Description** - Enter a brief description summarizing the requested change.

Figure 1. Disputes / Claims Window

Exercise 1

In this exercise, create a dispute/claim record.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD - Operations Office Staff [OSTAFF]**		
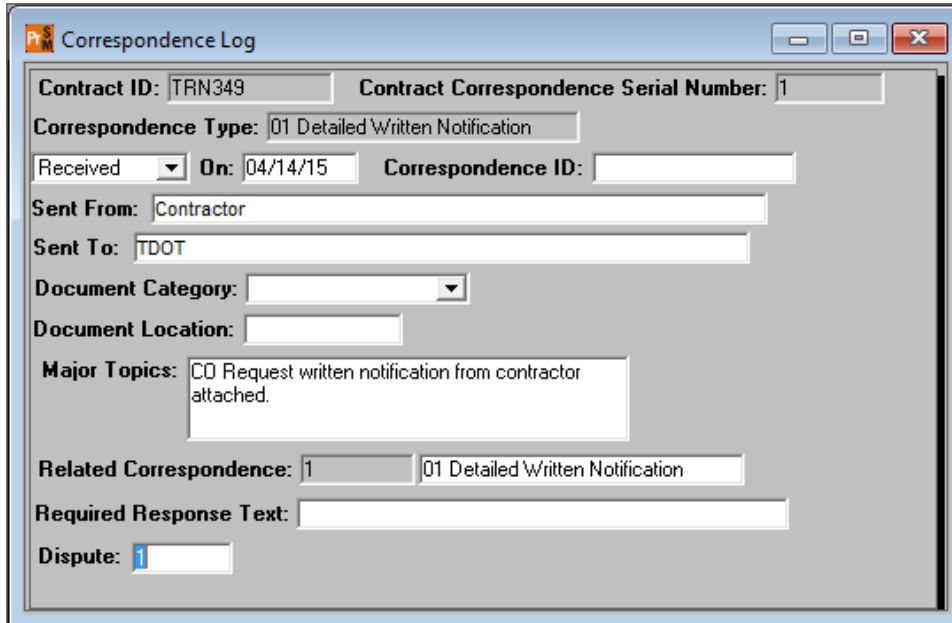
1. Start and log onto SiteManager as user **jj00016** *while connected in server mode*.

2. On the **Main 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 **Dispute/Claims** icon. The system displays the Disputes / Claims window.

5. From the **Services** menu, select **Choose Keys**. The system displays the Select Contract window.

6. In the **Contract ID** column, double-click **TRN349**. The system displays the Disputes / Claims window.

7. In the **Contractor Written Notification Date** field, type **110214**.

> ONCE THIS DATE IS ENTERED IT IS NEVER CHANGED.

8. In the **Change Type** dropdown list, select **A. Differing Site Conditions**.

9. In the **Status** dropdown list, select **01 Under Review**.

10. In the **Status Date** field, type **110214**.

11. In the **Request Description** field, type **Dement requesting item 709-05.06 to be added by Change Order to contract. Material will be used on abutment slopes. No time extension requested.**

12. **Save**.

13. **Close**. The system displays the Contract Records panel.

You've created a dispute / claim record.

Creating Correspondence Logs

Once a contract change request has been set up in the Disputes/Claims window, track all correspondence using the Correspondence Log window and linked back to the Disputes / Claims record.

Figure 2. Correspondence Log Window

Use the following fields to facilitate tracking of change requests documentation:

- **Correspondence Type** - Select based on Sections 104.03 and 105.16.

- **On** - Date the correspondence is sent or received.

- **From** - Either Contractor or TDOT.

- **To** - Either Contractor or TDOT.

- **Dispute** – Right-click and select the Search option to locate the appropriate dispute/claim record affiliated with this correspondence.

In addition, scan and attach copies of all supporting documents to this window.

CORRESPONDENCE SHOULD CONTINUE TO BE LOGGED AND ATTACHED IN THE CORRESPONDENCE LOG UNTIL THE DISPUTE/CLAIM HAS BEEN RESOLVED. A CONTRACT CHANGE REQUEST WILL TYPICALLY HAVE ONE DISPUTE/CLAIM SET UP WITH MULTIPLE ENTRIES IN THE CORRESPONDENCE LOG LINKED TO IT.

 Exercise 2

In this exercise, create a correspondence log record.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD - Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN349**		

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

Create the correspondence log record.

2. In the **Correspondence Type** dropdown list, select **01 Detailed Written Notification**.

3. In the unlabeled dropdown list to the left of the **On** field, select **Received**.

4. In the **On** field, type **041415**.

5. In the **Sent From** field, type **Contractor**.

6. In the **Sent To** field, type **TDOT**.

7. In the **Major Topics** field, type **CO Request written notification from contractor attached.**

8. **Save.**

Link the correspondence log record to the dispute/claim record.

9. In the **Related Correspondence** field, right-click and select **Search**. The system displays the Search window.

10. In the **Corr Srl Nbr** column, double-click **1**.

11. In the **Dispute ID** field, type **1**.

12. **Save**.

Attach a file.

14. On the toolbar, click the **Attachments** button. The system displays six more attachment-related buttons on the toolbar.

15. On the toolbar, click the **New OLE** button. The system displays the Insert Object window.

16. Click the **Create From File** tab. The system displays the Create From File panel.

Locate the file to attach.

17. Click the **Browse** button. The system displays the Browse window.

18. Select the file to be attached:
C:\SMTRAINS\SMFILES\Contract Change Notification - R&D Excavation.pdf

19. **Open**. The system displays the path to the selected file in the File Name field.

20. Click the **OK** button. The system displays the OLE Attachment window.

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

Describe the attachment.

21. In the **Name** field, type **CNQ165 SR58**.

22. In the **Description** field, type **Additional grading required**.

Provide access to the attachment.

23. 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.

24. Click the **Add** button. The system closes the OLE Attachment window.

25. 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.

26. **Save**.

View the attachment.

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

28. In the **Description** column, select **Additional grading required**.

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

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

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

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

32. **Save**.

33. **Close**.

You've created a correspondence log, linked it to the dispute/claim record and attached a file.

Summary

To create a dispute claim record:

1. Open the Disputes / Claims window.

2. From the **Services** menu, select **Choose Keys**. The system displays the Select Contract window.

3. In the **Contract ID** column, double-click the desired contract.

4. In the **Contractor Written Notification Date** field, type the desired date.

5. In the **Change Type** dropdown list, select the desired change type.

6. In the **Status** dropdown list, select the desired status.

7. In the **Status Date** field, type the desired date.

8. In the **Request Description** field, type the desired request description.

9. **Save**.

10. **Close**.

To create a correspondence log:

1. Open the Correspondence Log window.

2. In the **Correspondence Type** dropdown list, select the desired choice.

3. In the unlabeled dropdown list to the left of the On field, select the desired choice.

4. In the **On** field, type the desired date.

5. In the **Correspondence ID** field, type the desired ID.

6. In the **Sent From** field, type the desired sender.

7. In the **Sent To** field, type the desired recipient.

8. In the **Document Category** dropdown list, select the desired document category.

9. In the **Document Location** field, type the desired document location.

10. In the **Major Topics** field, type the desired text.

11. In the **Related Correspondence** field, search for and select the related correspondence.

12. In the **Required Response Text** field, type the desired text.

13. In the **Dispute ID** field, search for and select the related dispute.

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, create a dispute/claim record and a correspondence log.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD - Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN349**		

1. Create a dispute record:

   - Contractor Written Notification Date: **08/15/14**

   - Change Type: **C. Change in Character of Work**

   - Status: **01: Under Review**

   - Status Date: **09/01/14**

   - Request Description: **Disagreement on asphalt item best to use.**

2. Create a correspondence log record:

   - Correspondence Type: **01 Detailed Written Notification**

   - Status (unlabeled dropdown list): **Received**

   - On: **09/01/14**

   - Sent From: **Bailey Morgan, Inspector**

   - Sent To: **Highways, Inc Foreman**

3. Add an attachment to the correspondence log record.

   - File name and location:
     C:\SMTRAINS\SMFILES\Contract Change Notification - R&D Excavation.pdf

   - Name: **CNQ165 SR58**

   - Description: **Additional grading required**

4. **Exit SiteManager**.

Understanding Change Orders
for Office Documentation (Part 1)

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

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.
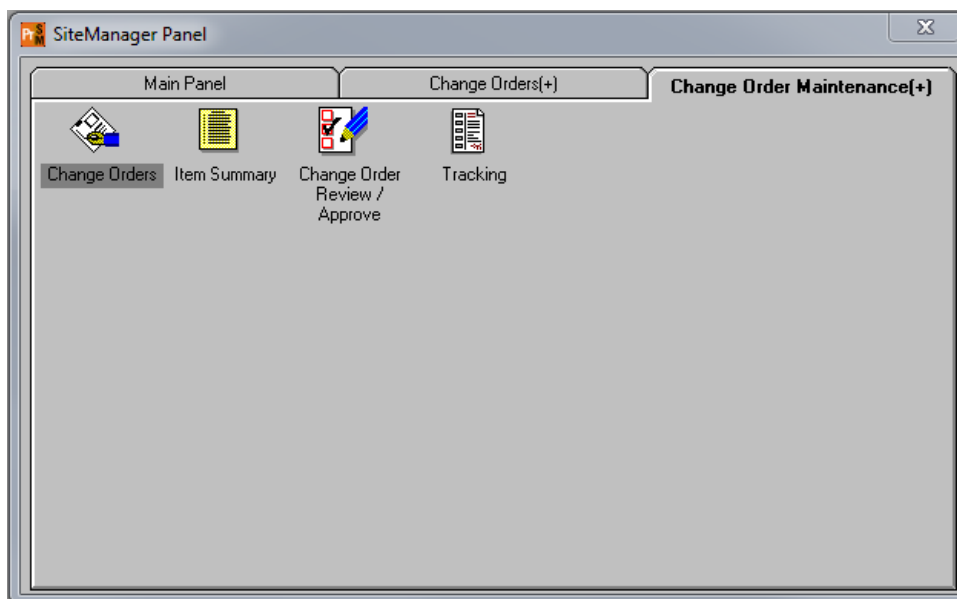
Figure 1. SiteManager Panel Window - Change Order Maintenance Panel

Exercise 1

In this exercise, navigate to the Change Order Maintenance panel.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		

1. Start and log onto SiteManager as user **jj00016** *while connected in server mode*.

   > SHIFT-TAB IF USER ID NOT HIGHLIGHTED.

2. On the **Main Panel**, double-click the **Change Orders** icon. The system displays the Change Orders panel.

3. On the **Change Orders** panel, double-click the **Change Order Maintenance** icon. The system displays the Change Order Maintenance panel.

You've accessed 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.

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.

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.

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 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 change order author 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 view-only and displays the following:

- Date a request for recommendation was sent to a reviewer or approver

- Reviewer or approver's name

- Action requested - review or approve

- Date the reviewer or approver makes a recommendation

- Recommendation - approved or denied

- Any remarks the reviewer or approver has made

Authorized users may also display details about current and historic contract items 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 THE ELECTRONIC VERSION.

WHEN AN APPROVER PHYSICALLY SIGNS THE CHANGE ORDER, THAT APPROVER SHOULD ALSO INDICATE THEIR APPROVAL OF THE CHANGE ORDER IN SITEMANAGER.

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.

  WHEN THE CHANGE ORDER IS APPROVED, IT BECOMES READ-ONLY AND THE ITEMS BECOME AVAILABLE ON DWRS.

- **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.

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.

Understanding Change Order Headers

Use the Change Order window's Header panel to do the following:

- Create a new change order by entering new descriptive information.

- Maintain the current descriptive information about an existing change order as the status of the change order progresses from Draft through Pending to Approved or Denied.

AS EXPLAINED IN THE NEXT CHAPTER, CHANGE ORDER APPROVAL LEVELS ARE AUTOMATICALLY DETERMINED BY SITEMANAGER, BUT CATEGORY TYPE IS A MANUAL SELECTION. BE SURE TO SELECT THE APPROPRIATE CATEGORY BASED ON THE LATEST CHANGE ORDER POLICY.
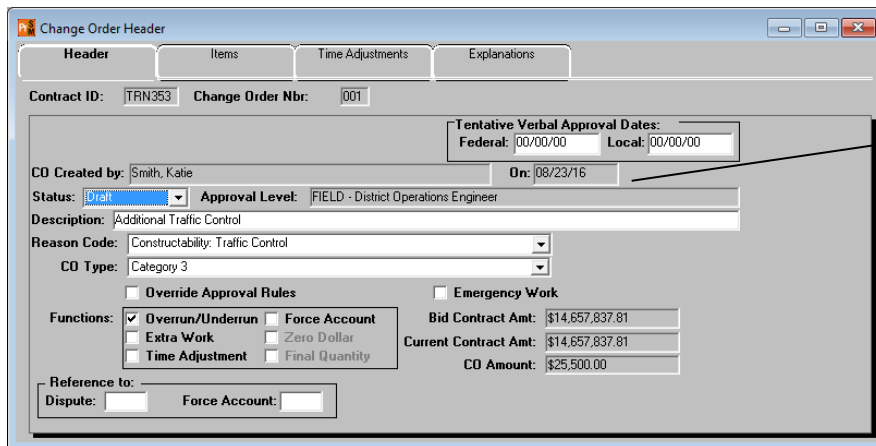
Figure 2. Change Order Window - Header Panel

DESCRIPTION OF SEVERAL OF THE FIELDS FOLLOW:

STATUS - THE STATUS OF A CHANGE ORDER IS AUTOMATICALLY SET TO DRAFT WHEN CREATED AND MUST BE CHANGED TO PENDING TO BEGIN THE APPROVAL PROCESS.

DESCRIPTION - USER MUST ENTER A GENERAL DESCRIPTION RELATING TO THE TYPE OF WORK.

REASON CODE - USER SELECTS THE CODE THAT BEST DESCRIBES THE REASON FOR THE CHANGE ORDER.

CO TYPE - USER SELECTS THE APPROPRIATE CATEGORY BASED ON THE CHANGE ORDER POLICY 355-01. THIS ALSO ALLOWS THE CHANGE ORDER FORM TO BE PRODUCED WITH THE PROPER SIGNATURES LINES.

USE "TIME ADJUSTMENTS DUE TO QUANTITY INCREASE" ONLY DURING CONTRACT FINALIZATION WHEN ADDING TIME DUE TO QUANTITY OVERRUNS. WHEN THIS CO TYPE IS SELECTED THE CHANGE ORDER SHOULD REMAIN IN DRAFT STATUS AND THE FINANCE OFFICE NOTIFIED WHEN IT IS READY FOR PROCESSING. THEY WILL OVERRIDE APPROVAL RULES, CHANGE THE STATUS TO PENDING, AND APPROVE. THIS TYPE OF CHANGE ORDER DOES NOT REQUIRE SIGNATURES.

FUNCTIONS - USER MUST SELECT FUNCTION ASSOCIATED WITH THIS CHANGE ORDER. (SEE "CHANGE ORDER FUNCTION" SECTION FOR MORE DETAILS.)

DISPUTE - USER SHOULD RIGHT-CLICK AND SEARCH TO ATTACH THE RELATED DISPUTE.

ALL RELATED SUPPORTING DOCUMENTATION SHOULD BE ATTACHED TO THE HEADER WINDOW.

Modifying Existing Contract Items

Use the Change Order window's Items panel to do the following:

- Select an existing item on the contract.

- Add a new item to the contract.

- Delete an item from a project.

Whenever the change order function is an overrun/underrun and/or extra work, the Items panel must be used to make the corresponding entries and/or modifications to the change order items. Extra work requires adding completely NEW contract item(s). Overrun/underrun requires modifying existing contract pay items.

When modifying an existing contract item, click the Select Item button on the toolbar to bring up a list of existing contract items from which to select. Use the Quantity field to modify the item quantity.

Figure 3. Change Order Window – Items Panel

Figure 4. Change Order Window – Select Contract Items Window

  Exercise 2

In this exercise, create a new change order to modify the quantity of an existing contract item.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		

1. On the **Change Order Maintenance** panel, double-click the **Change Orders** icon. The system displays the Change Order window's Header panel.

2. From the **Services** menu, click **Choose Keys**. The system displays the Select Contract and Change Order window.

3. In the **Contract ID** area, scroll to and double-click contract **TRN353**. The system displays the Header panel with the selected contract and next sequential change order number.

4. In the **Description** field, type **Additional Traffic Control**.

5. In the **Reason Code** dropdown list, select **Constructability: Traffic Control**.

6. In the **CO Type** dropdown list, select **Category 3**.

7. Select the **Overrun/Underrun** check box.

8. **Save**.

Add an existing contract item to this change order.

9. Click the **Items** tab. The system displays the Items panel.

10. On the toolbar, click the **Select Item** button. The system displays the Select Contract Items window.

11. In the **Contract Items** area, scroll to and double-click the following:

    Project Nbr: **67004-3213-14**
    Item Nbr: **0960**
    Item Code: **607-37.09**
    Description: **60" CORRUGATED METAL PIPE CULVERT**

12. In the **Quantity** column in the **This Change Order** field, type **170**.

13. **Save**.

14. Click the **Header** tab.

Calculate the change order.

15. From the **Services** menu, click **Calculate Change Order**.

16. **Save**.

17. What is the CO Amount for this change order? _____ .

You've created a new change order to modify an existing contract item.

Adding New Items to a Contract

Except for TDOT Add-on items, new items may only be added to an active contract through the change order process. When a new item is added to a contract, the user must choose a project number, a category, a line item number, item code, unit price, proposal line number, a supplemental description of the item (if required), and a quantity on the new item.

HEADQUARTERS FINANCE ADD ADD-ON ITEMS WITHOUT A CHANGE ORDER. ADD-ON ITEMS ARE ITEMS COVERED BY STANDARD SPECIFICATIONS OR SPECIAL PROVISIONS, AS DESCRIBED IN AN EARLIER CHAPTER OF THIS TRAINING DOCUMENT. TO HAVE AN ADD-ON ITEM ADDED TO A CONTRACT, CONTACT THE HEADQUARTERS FINANCE OFFICE.

Tip! The contract item list is updated immediately with the new contract item, but the new contract item has a Pending status type. Upon approval of the change order, the new contract item has an Approved status type and is available to be included on Daily Work Reports.

Figure 5. Change Order Window - Items Panel

THE CREATOR OF THE CHANGE ORDER WILL USE A STARTING NUMBER OF 9500 FOR THE LINE ITEM NUMBER OF THE FIRST NEW CONTRACT ITEM. EACH NEW CONTRACT ITEM SUBSEQUENTLY ADDED TO THE CONTRACT IS INCREMENTED BY 1 FROM THAT STARTING POINT BY THE CHANGE ORDER CREATOR. THIS CREATOR SHOULD ENTER THE SAME NUMBER IN THE PROPOSAL LINE NBR FIELD AS THEY ENTERED IN THE LINE ITEM NBR FIELD.

TO DETERMINE THE NEXT AVAILABLE LINE ITEM NUMBER, LOOK AT THE LAST LINE ITEM NUMBER USED ON THE LAST CHANGE ORDER (CHANGE ORDER > CHANGE ORDER ITEMS).

BY DEFAULT, THE MAJOR ITEM BOX IS CHECKED FOR ALL ITEMS BEING ADDED. THE CREATOR SHOULD ALWAYS UNCHECK THIS BOX BECAUSE THE CONTRACT'S MAJOR ITEMS ARE DETERMINED DURING CONTRACT ACTIVATION.

IT IS IMPORTANT TO SELECT THE APPROPRIATE CATEGORY WHEN ADDING ITEMS WITH A CHANGE ORDER. THE TABLE BELOW DEFINES THE VARIOUS CATEGORIES USED BY TDOT. PARTICIPATING CATEGORIES ARE THOSE PAID BY THE NORMAL FUNDING SOURCE FOR THE PROJECT. NON-PARTICIPATING CATEGORIES ARE THOSE PAID BY OTHER FUNDING SOURCES THAN THE NORMAL FUNDING SOURCE FOR THE PROJECT. DESCRIPTIONS OF THE FUNDING SOURCES CAN BE FOUND IN THE CONTRACT FUNDING WINDOW LOCATED AT *MAIN PANEL > CONTRACT ADMINISTRATION > CONTRACT RECORDS > CONTRACT FUNDING*. CATEGORIES 1100 AND GREATER (ALTERNATE BID ITEMS) SHOULD NOT BE USED TO ADD ITEMS TO A CONTRACT FOR ANY REASON, FOR THESE ARE ONLY USED IN THE BID LETTING. IF THERE ARE ANY QUESTIONS CONCERNING FUNDING OR IF A CATEGORY NEEDS TO BE ADDED, PLEASE CONTACT THE FINANCE OFFICE.

Item Types	Participating Categories	Non-Participating Categories
Roadway Items	0100	0110 - 0190
Box Bridge Items	0300	0310 - 0390
Bridge Items	0500	0510 - 0590
Maintenance & Other Items	0700	0710 - 0790
Utility Items	0900	0900 - 0990
Alternate Bid Items	>1100	

Exercise 3

In this exercise, create a change order to add a new item to a contract.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN353, 001** (change order)		

1. On the toolbar, click the **New** button. The system creates a blank record for a new change order on the contract.

2. In the **Description** field, type **Additional Sign Needed**.

3. In the **Reason Code** dropdown list, select **Constructability: Traffic Control**.

4. In the **CO Type** dropdown list, select **Category 3**.

5. Select the **Extra Work** check box.

6. **Save**.

Associate the items to the change order.

7. Click the **Items** tab.

8. On the toolbar, click the **New** button.

9. In the **Project Nbr** dropdown list, select **67004-3213-14**.

10. In the **Category Nbr** dropdown list, select **0100**.

11. In the **Line Item Nbr** field, type **9500**.

THE LINE ITEM NBR MUST BE UNIQUE.

12. On the **Item Code** field, right-click and select **Search**.

13. In the **Item Code** column, scroll to and click the following:

   Item Code: **713-16.07**
   Short Description: **END OF ROADWAY SIGN AND SUPPORT**.

14. Click **OK**.

15. Clear the **Major Item** check box.

16. In the **Unit Price** field, type **360.00**.

THE PROPOSAL LINE NBR IS THE SAME AS THE LINE ITEM NBR.

17. In the **Proposal Line Nbr** field, type **9500**.

18. In the **Quantity** column in the **This Change Order** field, type **70**.

19. **Save**.

20. Click the **Header** tab.

Associate this change order to a dispute.

21. In the **Reference to** area, in the **Dispute** field, right-click and select **Search**. The system displays the Search Window window.

22. In the **Dispute ID** column, double-click **1**. The system closes the Search Window window and displays the selected dispute number in the field.

23. **Save**.

Calculate the change order.

24. From the **Services** menu, click **Calculate Change Order**.

25. **Save**.

26. What is the CO Amount for this change order? _____ .

You've added a new item to an existing change order.

Creating Change Order Time Adjustments

Use the Change Order window's Time Adjustments panel to enter one or more time adjustments for a change order.
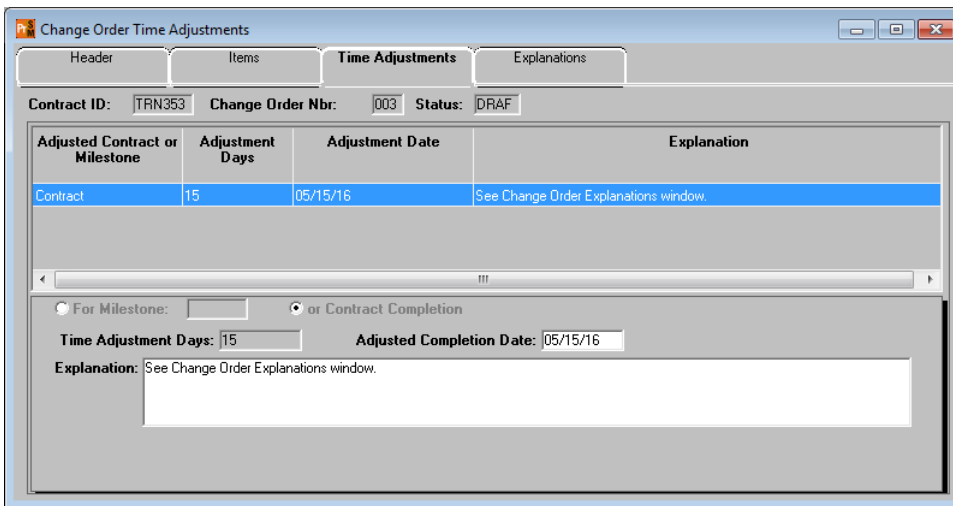
Figure 6. Change Order Window - Time Adjustments Panel

Record at least one adjustment if the Time Adjustment function is selected on the Header panel.

Time adjustments may be related to the following:

- Contract completion date

- Milestone(s) on the contract

- Both the contract completion date and milestone(s) associated with the contract

The charge type for the contract or milestone determines which timing components of the contract and its associated milestones may be entered and modified.

The three types of charge types are as follows:

- **Completion Date** - Has a specific fixed end date for the contract or for milestones within the contract. Only the completion date field may be entered. The system computes the number of days adjusted.

- **Available Days** - Only the number of days adjusted may be entered on the Time Adjustments panel.

- **Calendar Days** - Computes the end date for the contract and for milestones based on the number of calendar days allocated for the work. The number of days adjusted may be entered. The system then computes the completion date.

TDOT WILL PRIMARILY USE COMPLETION DATE CONTRACTS.

The Time Adjustments panel has the following limits:

- Only one adjustment to the contract completion date may be entered per change order.

- Only one adjustment to each milestone completion date or number of days may be entered per change order. (Time Adjustment Change Orders for milestones are only needed to accommodate changes to mowing and litter cycles, because they are contractual milestones.)

- Text explaining reasons for the time adjustment must be entered.

- The status of the associated change order determines whether the fields on this window are display only or may be modified by the user. Time adjustments may only be entered while a change order is in Draft status. Changes orders in a Pending, Approved, or Denied status do not allow updates to these fields.

THE EXPLANATION IN THE CHANGE ORDER TIME ADJUSTMENTS WINDOW SHOULD ALWAYS BE "SEE CHANGE ORDER EXPLANATIONS WINDOW."

Exercise 4

In this exercise, create a change order to adjust time on a contract.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN353, 002** (change order)		

1. On the toolbar, click the **New** button. The system creates a blank record for a new change order on the contract.

2. In the **Description** field, type **Water Utility Pipe Relocation**.

3. In the **Reason Code** dropdown list, select **Change Field Conditions: Utilities**.

4. In the **CO Type** dropdown list, select **Category 3**.

5. Select the **Time Adjustment** check box.

6. **Save**.

Record the time adjustment information.

7. Click the **Time Adjustments** tab. The system displays the Time Adjustments panel.

8. In the **Adjustment Completion Date** field, type **051516**.

9. In the **Explanation** field, type **See Change Order Explanations panel.**

10. **Save**.

11. Click the **Header** tab.

Calculate the change order.

12. From the **Services** menu, click **Calculate Change Order**.

13. **Save**.

14. What is the CO Amount for this change order? _____ .

You've created a time adjustment.

Applying Explanations

Use the Change Order Explanation window to document the reasons for contract changes. In this window, the author of the change order records the reason for changes in the contract included in the change order. Reviewers and approvers use this window to view change order reasons.

> USE THE EXPLANATION TYPE "GENERAL CHANGE ORDER EXPLANATIONS" FOR ALL THE EXPLANATIONS FOR A CHANGE ORDER.

When the change order is in Draft status and the window is in New mode, the user may use the lower data window to do the following:

- Display and search the list of standard explanations for this contract type.

- Type a non-standard explanation description in the multi-line text field.
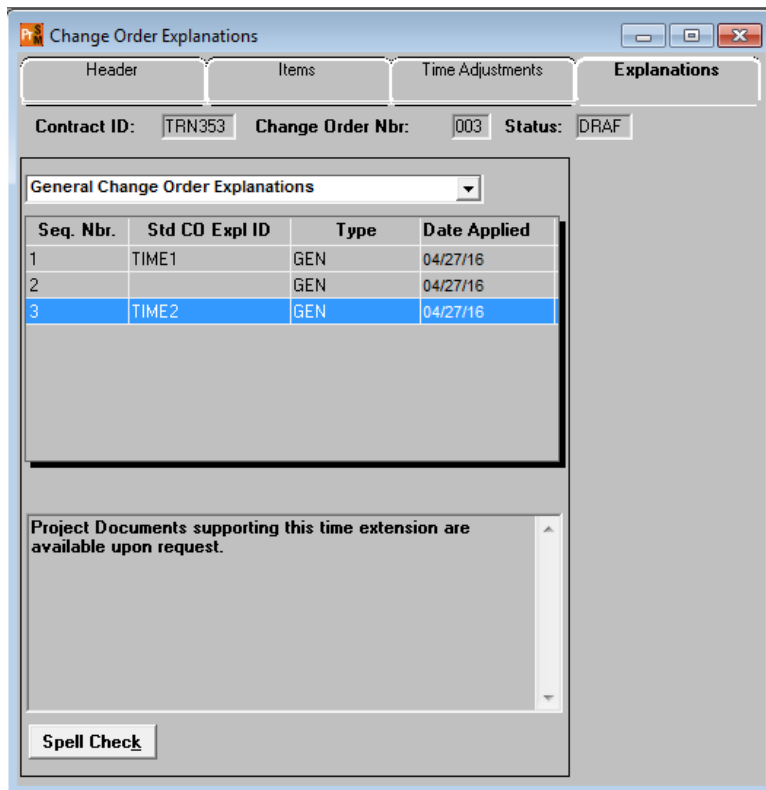
Figure 7. Change Order Window - Explanations Panel
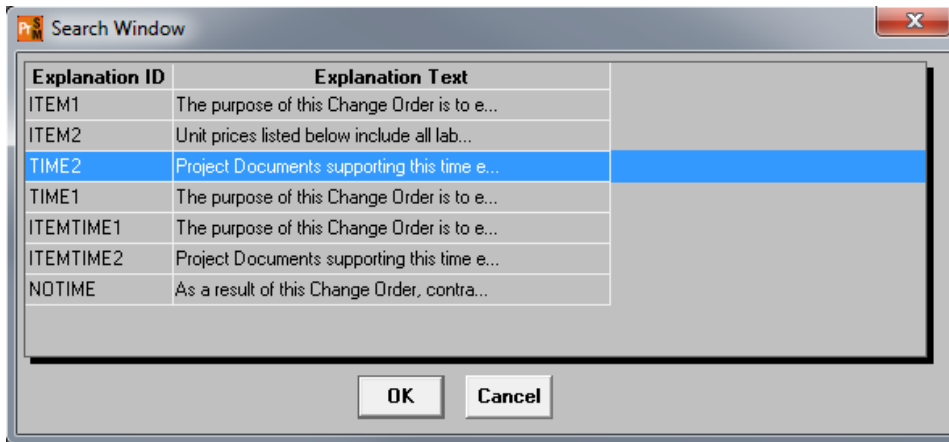
Figure 8. Search Window – Available from Pick Std Exp ID Field

STANDARD AND NON-STANDARD EXPLANATIONS ARE USED TOGETHER TO FORM THE BODY OF THE PRINTED CHANGE ORDER REPORT. BEFORE TYPING A NON-STANDARD EXPLANATION, THE USERS SHOULD CHECK TO SEE IF STANDARD EXPLANATIONS EXIST FOR THE CHANGE ORDER.

THE STANDARD EXPLANATION IDS HAVE BEEN NAMED TO HELP DETERMINE WHEN AND WHERE TO USE THEM.

IF THE ID ENDS WITH 1, USE BEFORE NON-STANDARD EXPLANATIONS.
IF THE ID ENDS WITH 2, USE AFTER NON-STANDARD EXPLANATIONS.

THE SEQUENCING OF THE EXPLANATIONS IS VERY IMPORTANT BECAUSE THIS DETERMINES THE ORDER IN WHICH THEY ARE PRINTED ON THE CHANGE ORDER REPORT.

USE THE STANDARD EXPLANATIONS AS FOLLOWS:

ITEM1 AND **ITEM2** – AT THE BEGINNING AND END OF AN EXPLANATION FOR A CHANGE ORDER ADDING OR MODIFYING CONTRACT ITEMS. INSERT THE REQUIRED NON-STANDARD EXPLANATIONS BETWEEN THEM.

NOTIME – WHEN THERE IS NO TIME EXTENSION ON THE CHANGE ORDER THE ORDER SHOULD BE "ITEM1, NON-STANDARD EXPLANATION, NOTIME, ITEM2.

TIME1 AND **TIME2** – USED AT THE BEGINNING AND END OF AN EXPLANATION FOR A CHANGE ORDER MODIFYING CONTRACT TIME. NON-STANDARD EXPLANATIONS ARE REQUIRED BETWEEN THEM.

I**TEMTIME1** AND **ITEMTIME2** – USED AT THE BEGINNING AND END OF AN EXPLANATION FOR A CHANGE ORDER ADDING OR MODIFYING CONTRACT ITEMS AND TIME. NON-STANDARD EXPLANATIONS ARE REQUIRED BETWEEN THEM.

Exercise 5

In this exercise, add standard explanations and a non-standard explanation to a change order.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN353, 003** (change order)		

1. Click the **Explanations** tab. The system displays the Explanations panel.

Add a standard explanation.

2. Verify that the default **General Change Order Explanations** is selected in the dropdown list.

3. On the toolbar, click **New**.

4. On the **Pick Std Exp ID** field, right-click and select **Search**.

5. In the **Explanation** list box, scroll to and click **TIME1**.

6. Click **OK**.

7. **Save**.

Add a non-standard explanation.

8. On the toolbar, click **New**.

9. In the lower text field, type **Due to an erosion issue at station 100+00 the contractor had to install additional corrugated metal pipe. This required additional traffic control.**

10. **Save**.

Add another standard explanation.

11. On the toolbar, click **New**.

12. On the **Pick Std Exp ID** field, right-click and select **Search**.

13. In the **Explanation** list box, scroll to and click **TIME2**.

14. Click **OK**.

15. **Save**.

16. **Close**. The system displays the Change Order Maintenance panel.

You've added standard explanations and a non-standard explanation.

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.

Figure 9. 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 <u>ROGERS GROUP, INC.</u> with <u>TRAVELERS CASUALTY & SURETY COMPANY OF AMERICA</u>, as Surety, entered into a contract with the STATE OF TENNESSEE, Department of Transportation, Bureau of Operations, on <u>06/19/2015</u>, 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	17.85	43,143.45

Figure 10. Supplemental Agreement and/or Request for Construction Change Report (initial page)

Understanding Change Orders for Office Documentation (Part 1)

Supplemental Agreement and/or Request for Construction Change Category 3
Change Order No. 001

STATE OF TENNESSEE Contract No.: CNP160
Department of Transportation Project No.: 44011-3200-94, 44011-4200-04, 71008-3203-94, 71008-4203-04,
Bureau of Operations 71031-3212-94, 71031-4212-04
Nashville, TN 37243-0326 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 FHWA/CERTIFICATION ACCEPTANCE DATE
DISTRICT SUPERVISOR
_____CONTRACTOR

By _____
APPROVED BY: DATE

_____ DATE _____SURETY
DISTRICT OPERATIONS ENGINEER

By _____
DATE

Figure 11. 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 12. Change Order Report

 Exercise 6

In this exercise, access and view the Change Order Report.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN353**; **003** (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 Contract and Change Order fields auto-populated with the current keys.

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 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 Order window:

1. On the **Main Panel** panel, double-click the **Change Orders** icon.

2. Double-click the **Change Order Maintenance** icon.

3. Double-click the **Change Orders** icon.

To access the Header panel:

1. Open the Change Order window.

2. Click the **Header** tab.

To access the Items panel:

1. Open the Change Order window.

2. Click the **Items** tab.

To access the Time Adjustments panel:

1. Open the Change Order window.

2. Click the **Time Adjustments** tab.

To access the Explanations panel:

1. Open the Change Order window.

2. Click the **Explanations** tab.

To choose keys for a new change order:

1. Open the Change Order window.

2. From the **Services** menu, select **Choose Keys**.

3. In the **Contract ID** area, select the desired contract.

4. Click **OK**.

To open an existing change order:

1. Access the **Header** panel.

2. On the toolbar, click **Open**.

3. In the **Contract ID** area, scroll to and double-click the desired contract.

4. In the **Change Order** area, scroll to and select the desired change order.

5. Click **OK**.

To modify an existing time adjustment to a contract or milestone:

1. Access the **Time Adjustments** panel for the desired change order.

2. In the top pane, select the desired contract or milestone adjustment choice.

3. If enabled, in the **Time Adjustment Days** field, type the modified number of days the contract or a milestone is adjusted.

4. If enabled, in the **Adjusted Completion Date** field, type the modified completion date of the contract or a milestone.

5. Select the **for Milestone** or the **or Contract Completion** radio button (ON) to indicate whether this is a modification of a previous milestone or a contract adjustment

6. Provide an explanation for the new time adjustment, if desired.

7. **Save**.

To modify an existing contract item:

1. Access the **Items** panel for the desired change order (with **Overrun/Underrun** function selected).

2. On the toolbar, click the **Select Item** button.

3. In the **Contract Items** area, scroll to and select the desired contract item.

4. Click **OK**.

5. In the **CO Item Description** field, type the description for the item change.

6. In the **Quantity** column, in the **This Change Order** field, type change order quantity.

7. **Save**.

To add a new line item from the Item Master List to the contract:

1. Access the **Items** panel for the desired change order (with **Extra Work** function selected).

2. Click the **Items** tab.

3. On the toolbar, click **New**.

4. In the **Project Nbr** dropdown, select the desired project.

5. In the **Category Nbr** dropdown, select the desired category**.**

6. In the **Line Item Nbr** field, type the desired number.

7. In the **Item Code** field, right-click and select **Search**.

8. In the **Item Code** column, scroll to and select the desired item code.

9. In the **Unit Price** field, type the unit price.

10. In **Proposal Line Nbr** field, type the desired number.

11. In the **Quantity** column in the **This Change Order** field, type the desired quantity.

12. **Save**.

To apply a standard explanation to a change order:

1. Access the **Explanations** panel for the desired change order.

2. On the toolbar, click the **New** button.

3. In the **Pick Std Exp ID** field, right-click and select **Search**.

4. Scroll to and select the desired explanation.

5. Click **OK**.

6. **Save**.

To add a non-standard explanation:

1. Access the **Explanations** panel for the desired change order.

2. On the toolbar, click the **New** button.

3. In the **Enter Text Below** text box, type the desired explanation.

4. **Save**.

To calculate a change order:

1. Open the Change Order Header window for the desired contract and change order.

2. From the **Services** menu, select **Calculate Change Order**.

3. **Save**.

Review Exercise

In this exercise, create a new change order.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN353, 001** (change order)		

1. Navigate to the **Change Order** window.

2. Create a new time adjustment change order for contract **TRN350**.

   CAUTION!

   THIS CONTRACT IS NOT THE HOT KEY.

   - Description: **Extended time due to relocation of water utility**.

   - Reason Code: **Change Field Conditions: Utilities**

   - CO Type: **Category 3**

   - Function: **Time Adjustment**

   - Indicate that the new contract completion date is **05/16/17**.

3. Create a new change order on contract **TRN350**.

   - Description: **Increased mix and added pavement marking.**

   - Reason Code: **Scope Change: Design**

   - CO Type: **Category 3**

   - Function: **Overrun/Underrun** and **Extra Work**.

4. Navigate to the **Items** panel and change an existing item on the contract.

   - Project Nbr: **67004-3213-14**

   - Line Item Nbr: **0800**

   - Quantity for this change order: **500**

5. Add a new item to the contract.

  - Project Nbr: **67004-3213-14**

  - Category Nbr: **0100**

  - Line Item Nbr: **9501**

  - Item Code: **716-11.01**

  - Unit Price: **$5600.00**

  - Proposal Line Nbr: **9501**

  - Quantity for this change order: **3**

6. **Calculate** the change order on the **Header** panel.

  - What is the CO Amount? _____

7. Apply standard explanation **ITEM1**, then a non-standard explanation of your choice (type it in), then the standard explanation **ITEM2**.

8. **Exit SiteManager**.

Understanding Change Orders for Office Documentation (Part 2)

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

Forwarding a Change Order for Review

Prior to beginning the approval process, the change order author may forward the change order for review while it is still in Draft status.

- Using the Services menu's Forward To choice, select the designated reviewers. The draft Change Order may be accessed and reviewed by multiple users concurrently. (This review may be eliminated and the Status changed to Pending at any time to begin the approval process.)

- Reviewers record their comments using the Change Order Review/Approve window.

- At any time during the process, reviews may be viewed on-line using the Change Order Tracking window.
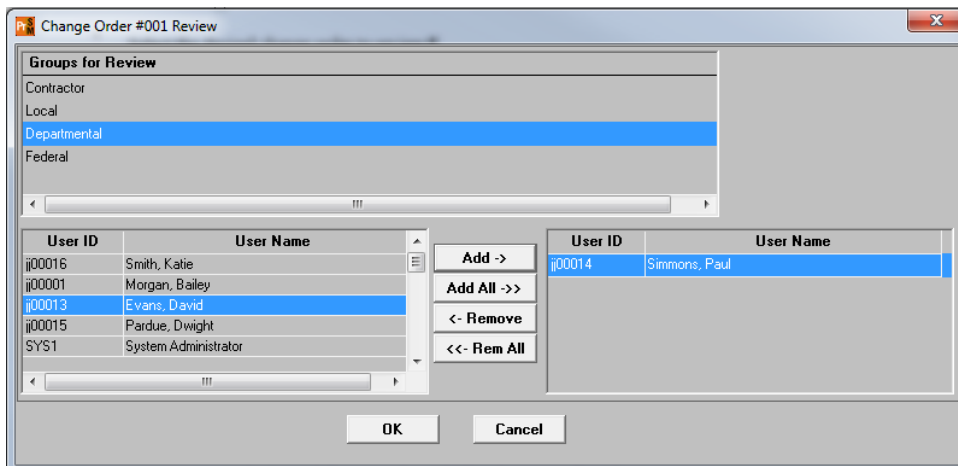
Figure 1. Change Order #< > Review Window

Exercise 1

In this exercise, forward a change order for review.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		

1. Start and log onto SiteManager as user **jj00016** *while connected in server mode*.

2. On the **Main Panel**, double-click the **Change Orders** icon. The system displays the Change Orders panel.

3. Double-click the **Change Order Maintenance** icon. The system displays the Change Order Maintenance panel.

4. Double-click the **Change Orders** icon.

Select the desired change order to review.

5. On the toolbar, click the **Open** button. The system displays the Select Contract and Change Order window.

6. In the **Contract ID** area, in the **Contract ID** column, scroll and double-click **TRN355**.

7. In the **Change Order** area, in the **CO Nbr** column, scroll to and click **001**.

8. Click the **OK** button. The system displays the Header panel.

Forward the selected change order for review.

9. On the **Services** menu, select the **Forward To** choice. The system displays the Change Order #< > Review window.

Select the group and reviewer.

10. In the **Groups for Review** pane, select **Departmental**.

11. In the lower left pane, select **jj00014 Simmons, Paul**.

12. Click the **Add** button.

13. Click the **OK** button. The system closes the window and displays the Header panel.

14. **Save**. The system displays a message to inform you that mail has been sent.

15. In the message, click **OK**.

Now that you've forwarded the change order for review, reviewers may use either the custom BOE or the SiteManager system Change Order report.

Sending a Change Order for Approval

For the change order to be approved, it must be placed in Pending status on the Change Order window's Header panel and sent for approval.
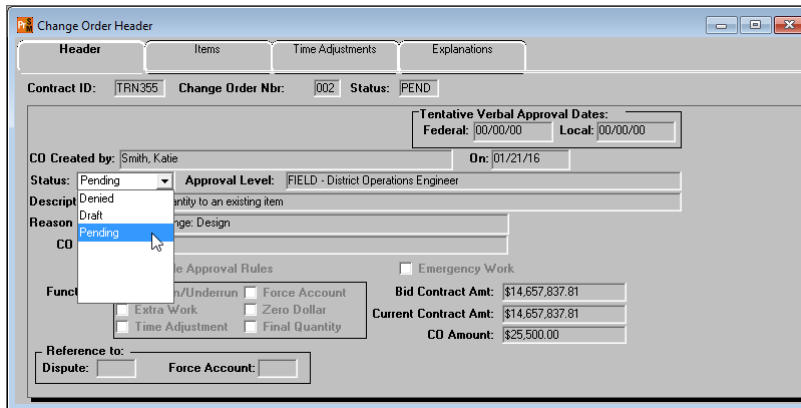
Figure 2. Change Order Window - Header Panel

The following facilitates the approval process:

1. When the change order is changed to Pending status and saved, the user is prompted to submit the Change Order for approval using the Change Order Approval window.

2. Approvers record their decisions using the Change Order Review / Approval window.

3. At any time during the review and approval process, reviews and approvals may be viewed on-line using the Change Order Tracking window.

4. If an approver selects "denied" in the review/approve window, they must document the reason for denial in the Remarks field including whether corrections are needed or if this CO is permanently denied.   If corrections are needed, the creator should change the status back to draft, make corrections, and change it to pending to submit it for approval again.

5. If an approver selects "denied" in the review/approve window and provides a remark explaining why the Change Order will never be approved, the creator should change the status of the Change Order to Denied in the Header window. BEWARE: A Change Order in Denied Status may not be changed to Draft or Pending.

NOTE

CHANGING THE STATUS FROM PENDING BACK TO DRAFT DELETES PREVIOUSLY SELECTED APPROVERS.
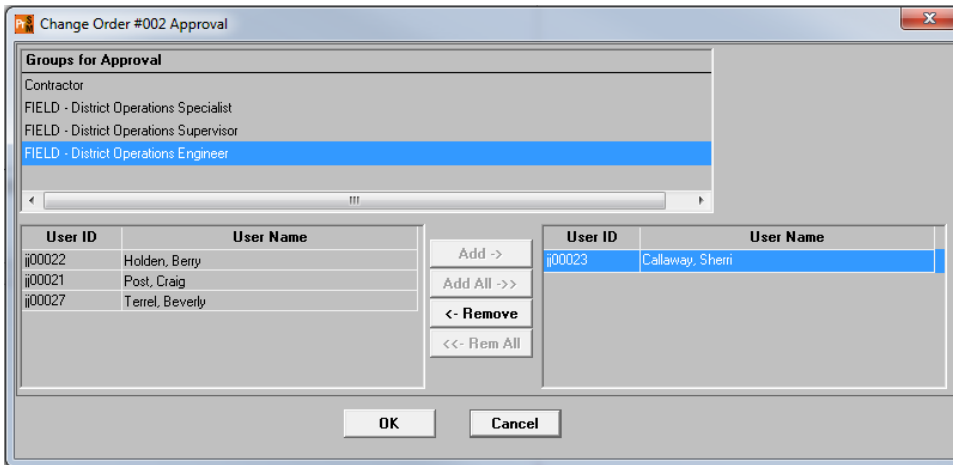
Figure 3. Change Order Approval Window

To provide full tracking, change order approval levels are set up in SiteManager based on the department's latest change order policy.

	Category				
	1	2	3	4	Approver
Contractor	√	√	√	√	Regional Designated Representative
District Operations Specialist	√	√	√	√	Regional Designated Representative
District Supervisor	√	√	√	√	Regional Designated Representative
District Operations Engineer	√	√	√		Regional Designated Representative
Director of Regional Operations	√	√			Regional Designated Representative
Assistant Chief Engineer Region	√	√			Regional Designated Representative
Director of Construction / Asst. Director of Construction	√				Construction Representative
Asst. Chief Engineer Operations	√				HQ Construction Representative
Commissioner	√				HQ Construction Representative
HQ FHWA CO Rep, as applicable					HQ Finance Representative
√ Approval level required in SiteManager √ Approval level required in SiteManager and signature required on printed form Note: The Finance Office will be added automatically once the Pending change order is saved.					

CIRCUMSTANCES WHERE THE CHANGE ORDER IS TO BE LEFT IN DRAFT STATUS (NEVER SET TO PENDING) ON THE CHANGE ORDER HEADER WINDOW INCLUDE THE FOLLOWING:

CO TYPE - "TIME ADJUSTMENT DUE TO QUANTITY INCREASE" WHICH IS USED IN THE FINAL ESTIMATE PROCESS. THIS TYPE OF CHANGE ORDER DOES NOT REQUIRE A SIGNED CHANGE ORDER.

CO FUNCTIONS - "ZERO DOLLAR" WHICH ARE USED FOR THINGS LIKE ADDING SPECIAL PROVISIONS. THIS CHANGE ORDER FUNCTION WILL REQUIRE A SIGNED CHANGE ORDER.

THESE SHOULD BE LEFT IN DRAFT STATUS BY THE OFFICE STAFF AND THEY SHOULD NOTIFY THE FINANCE OFFICE WHEN THE CHANGE ORDERS ARE COMPLETE. THE FINANCE OFFICE WILL OVERRIDE THE APPROVAL RULES, CHANGE THE STATUS TO PENDING, AND APPROVE THE CHANGE ORDER.

Exercise 2

In this exercise, send a change order for approval.

User ID	**jj00016**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN355**		

1. On the toolbar, click **Open**. The system displays the Select Contract and Change Order window.

2. In the **CO Nbr** column, double-click **002**.

3. In the **Status** dropdown list, select **Pending**.

4. **Save**. The system displays a message confirming the status change to Pending.

5. In the message, click **Yes**. The system displays the Change Order #< > Approval window.

Add a group for approval.

6. In the **Groups for Approval** area, select **Contractor**.

THIS IS THE REGIONAL DESIGNATED REPRESENTATIVE.

7. In the lower left pane, select **jj00024 Burton, Mike**.

8. Click **Add**.

Add a second group for approval.

9. In the **Groups for Approval** area,
    select **FIELD – District Operations Specialist**.

10. In the lower left pane, select **jj00021 Post, Craig**.

11. Click **Add**.

Add a third group for approval.

12. In the **Groups for Approval** area,
    select **FIELD – District Operations Supervisor**.

13. In the lower left pane, select **jj00019 Hill, Tracy**.

14. Click **Add**.

Add a fourth group for approval.

15. In the **Groups for Approval** area,
    select **FIELD – District Operations Engineer**.

16. In the lower left pane, select **jj00023 Callaway, Sherri**.

17. Click **Add**.

Send the notification.

18. Click **OK**. The system displays a message to inform you that
    mail has been sent.

19. In the message, click **OK**.

20. **Save**.

21. **Exit SiteManager**.

Now that you have forwarded the change order for review, the reviewers may use the internal SiteManager Change Order report or the custom BOE Change Order report.

Replacing Approvers

Exercise 3

In this exercise, replace an approver after a change order has been sent for approval.

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 **Change Orders** icon. The system displays the Change Orders panel.

3. Double-click the **Change Order Maintenance** icon. The system displays the Change Order Maintenance panel.

4. Double-click the **Change Orders** icon.

Select the desired change order.

5. On the toolbar, click the **Open** button. The system displays the Select Contract and Change Order window.

6. In the **Contract ID** area, in the **Contract ID** column, scroll and double-click **TRN355**.

7. In the **Change Order** area, in the **CO Nbr** column, scroll to and click **002**.

8. Click the **OK** button. The system displays the Header panel.

Open the window where the approver can be changed.

9. From the **Services** menu, select the **Forward To** choice. SiteManager displays the Change Order #002 Approval window.

10. In the **Groups for Approval** pane, select the **District Operations Specialist** group.

> CAUTION!
>
> UPON CHANGING THE FIRST-LEVEL APPROVER, THE SYSTEM DOES NOT SEND AN IN-BOX NOTIFICATION TO THE NEW FIRST-LEVEL APPROVER.

Remove the incorrect approver.

> 11. In the right pane, notice the incorrect approver's name.

> 12. Click **Remove**.

Add the correct approver.

> 13. In the left pane, select **jj00022 Holden, Berry**.

> 14. Click **Add**.

> 15. Click **OK**.

> 16. **Save**.

> 17. **Exit SiteManager**.

You've replaced an incorrect change order approver.

Reviewing and Approving Change Orders

The Change Order Review/Approve icon allows the user who receives an In-Box message to review a draft change order or to approve a pending change order.

The Review/Approve window allows the user to:

- Access the change order information

- View the contract and change order information on-line

- Document their recommendation to approve or deny the Draft or Pending Change Order

- Record Remarks related to their recommendation. Remarks are optional.
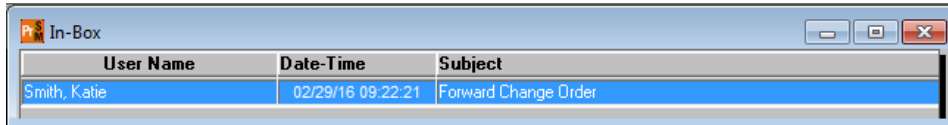
Figure 4. In-Box Window
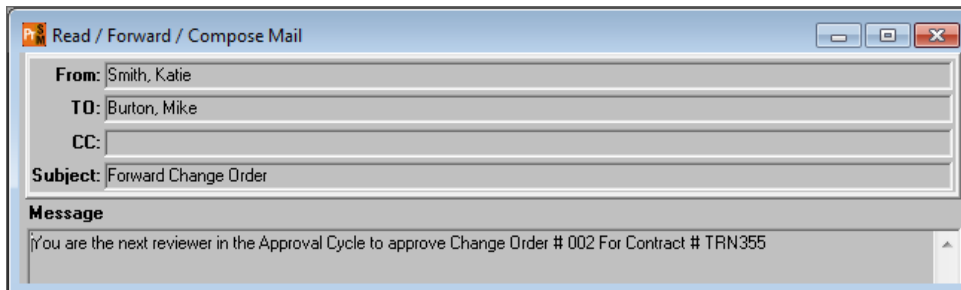
Figure 5. Read / Forward / Compose Mail Window (First-Level Approver)
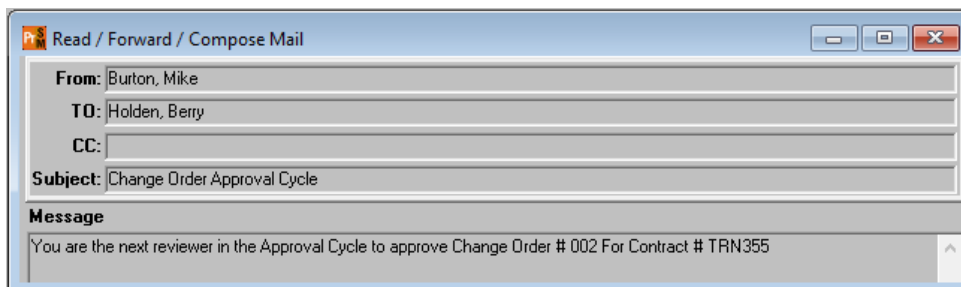
Figure 6. Read / Forward / Compose Mail Window (Subsequent-Level Approver)
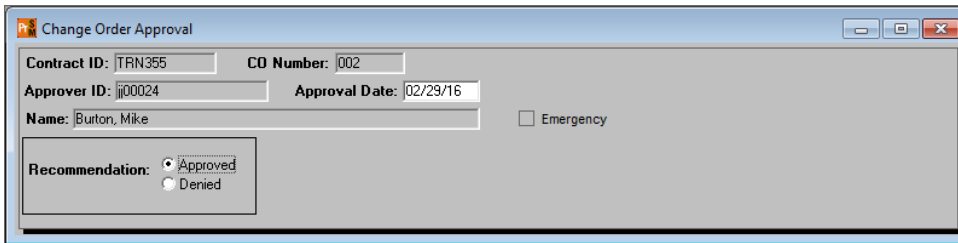
Figure 7. Change Order Approval Window

Exercise 4

In this exercise, approve a change order.

User ID	**jj00024**	Password	**pass**
Connection	**Training Server**		
Group Name	**REG - Contractor/Surety/Local Rep [CONT]**		

1. Start and log onto SiteManager as user **jj00024** *while connected in server mode*.

Open the Inbox and see if you've received a Pending Change Order to approve.

2. On the **Main Panel**, double-click the **Accessories** icon. The system displays the Accessories panel.

3. Double-click the **In-Box** icon. The system displays the In-Box window.

4. Double-click the message titled **Forward Change Order**.

5. Is there a request to approve change order **002** on contract **TRN355**? _____

6. To close the Read / Forward / Compose Mail window, click **Close**. The system displays the In-Box window.

7. To close the In-Box window, click **Close**. The system displays the SiteManager Panel window.

8. Click the **Main Panel** tab. The system displays the Main Panel panel.

Open the Change Order Approval window.

9. Double-click the **Change Orders** icon. The system displays the Change orders panel.

10. Double-click the **Change Order Maintenance** icon. The system displays the Change Order Maintenance panel.

11. Double-click the **Change Order Review / Approve** icon. The system displays the Change Order Review / Approval window.

12. In the **Contract ID** area, double-click **TRN355**.

13. In the **Change Orders** area, double-click **002**. The system displays the Change Order Approval window.

Review the details of the change order.

14. From the **Services** menu, select the **Change Order** option. The system displays the Change Order window.

THIS IS HOW THE
CHANGE ORDER
CAN BE REVIEWED
BY AN APPROVER.

15. Review the change order details.

16. Click the **Items** tab. The system displays the Items panel.

17. Review the item details.

18. To close the Change Order window, click **Close**. The system displays the Change Order Approval window.

Approve the change order for the first approval group.

19. In the **Recommendation** area, click the **Approved** button.

20. **Save**. The system displays a message that requests you to confirm the recommendation.

21. In the message, click **Yes**. The system displays a message to inform you that the mail has been sent.

22. In the message, click **OK**.

23. To close the Change Order Approval window, click the **Close** button. The system displays the Change Order Maintenance panel.
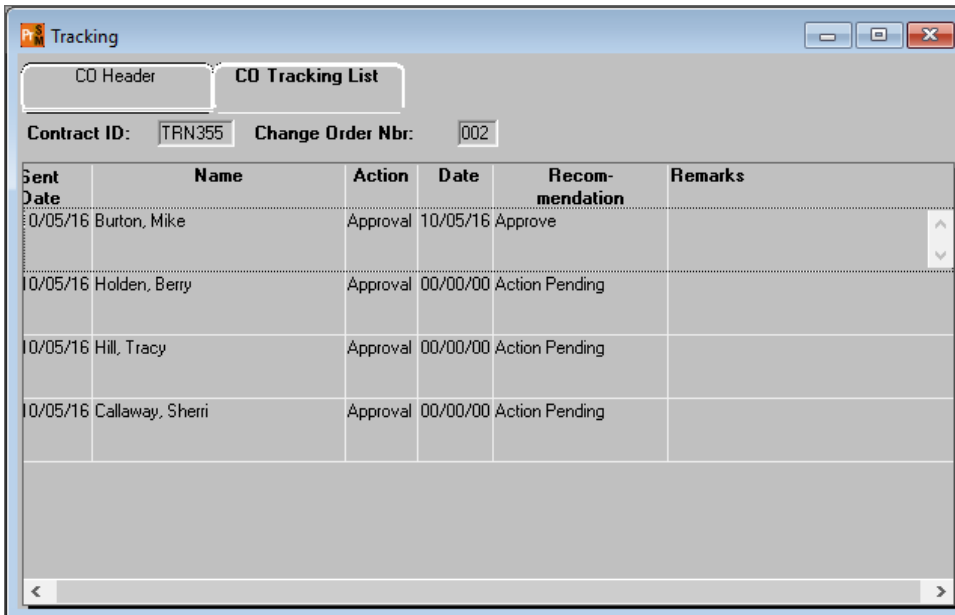
You've reviewed the change order and approved it for the first approval group.

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:

- Date a request for recommendation was sent to a reviewer or approver

- Reviewer or approver's name

- Action requested - review or approve

- Date the reviewer or approver made a recommendation

- 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.

Figure 8. Change Order Tracking Window

 Exercise 5

In this exercise, view the tracking window.

User ID	**jj00024**	Password	**pass**
Connection	**Training Server**		
Group Name	**REG - Contractor/Surety/Local Rep [CONT]**		
Prior Keys	**TRN355**		

1. On the **Change Order Maintenance** panel, double-click the **Tracking** icon. The system displays the Tracking window.

2. On the Tracking window, click the **CO Tracking List** tab.

3. Who is the next person to approve the change order? _____

4. To close the Tracking window, click **Close**.

5. **Exit SiteManager**.

You've viewed the Tracking window.

Summary

To access the Change Order Maintenance panel:

1. On the **Main Panel**, double-click the **Change Orders** icon.

2. On the **Change Orders** panel, double-click the **Change Order Maintenance** icon. The system displays the Change Order Maintenance panel.

To forward a Draft change order for review:

1. On the **Change Order Maintenance** panel, double-click the **Change Orders** icon.

2. From the **Services** menu, select **Open**.

3. Select a Draft change order.

4. From the **Services** menu, click the **Forward To** choice. The system displays the Change Order Review window.

5. In the **Groups for Review** area, click a desired choice.

6. In the left pane, scroll to and select the desired user name and user ID.

7. Click **Add**.

8. Repeat for all desired groups.

9. Click **OK**.

To change a Draft change order to Pending and send for approval:

1. On a Draft change order, in the **Status** dropdown list, select **Pending**.

2. **Save**. The system displays a message prompting you to confirm.

3. Click **Yes**. The system displays the Change Order #< > Approval window.

4. In the **Groups for Approval** area, click the desired choice.

5. In the left pane, scroll to and select the desired user name and user ID.

6. Click **Add**.

7. Repeat for all desired groups.

8. Click **OK**.

To replace an approver after a change order has been sent for approval:

1. From the **Services** menu, select the **Forward To** choice.
   SiteManager displays the Change Order < > Approval window.

2. In the **Groups for Approval** pane, select the group to be
   changed.

3. Click **Remove**.

4. In the left pane, select the desired approver.

5. Click **Add**.

6. Repeat steps 3-6 as necessary.

7. Click **OK**.

To review or approve a change order:

1. On the **Change Order Maintenance** panel, double-click the
   Change Order Review/Approve icon.

2. Open a Draft change order that has been forwarded for review or
   a Pending change order that has been sent for approval.

3. Click the **Approved** or **Denied** button.

4. **Save**.

To track the status of a change order:

1. On the **Change Order Maintenance** panel, double-click the
   Tracking icon.

   - or -

   From the **Services** menu, select **Change Order Tracking**.

2. Open a desired change order.

Review Exercise

In this exercise, send a change order for approval and grant first-level approval.

User ID   **jj00016**   Password   **pass**
Connection   **Training Server**
Group Name   **FIELD – Operations Office Staff [OSTAFF]**

1. Start and log onto SiteManager as user **jj00016** *while connected in server mode*.

2. Navigate to the Change Orders window.

3. Open change order **004** for contract **TRN355**.

4. Change its status to **Pending**.

5. Send the change order for approval to the following personnel:

   - **Contractor:**
     jj00024 Burton, Mike

   - **Field – District Operations Specialist:**
     jj00022 Holden, Berry

   - **Field – District Operations Supervisor:**
     jj00019 Hill, Tracy

   - **Field – District Operations Engineer:**
     jj00023 Callaway, Sherri

6. Navigate to Tracking window.

7. Who is the first person responsible for approving change order **004** on contract **TRN355**? _____

8. **Exit SiteManager**.

9. Start and log onto SiteManager as user **jj00024** *while connected in server mode*.

10. Navigate to the Change Order Review/Approval window.

11. Recommend that change order **004** on contract **TRN355** be **approved**.

12. **Exit SiteManager**.

You've sent a change order for approval and granted first-level approval.

Understanding Change Orders for Office Documentation (Part 2)

Finalizing Contracts
for Office Documentation

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

Overview of the Contract Finalization Process

Once a project is complete, the final inspection has been held and any punch-list items are finished, the responsible Operations Staff will complete a full review of all project documentation to ensure accuracy and completeness.

Final Estimate Requirements

Final estimates differ from other estimates in that:

- There may only be <u>one</u> final estimate per contract.

- Final estimate discrepancies cannot be overridden—they must be resolved before the final estimate may be approved. Final estimate discrepancies may include the following:

  - Checklist Events incomplete

  - Item overruns

  - Contract Completion date missed

  - Milestone Completion date missed

For final estimates, SiteManager performs the same edits, validations, and calculations as for progress estimates.

TDOT Final Estimate Workflow

A. Pre-Final Estimate Process –

A temporary PROGRESS (Pre-Final) estimate will be generated to review work item quantities and to determine discrepancies to be resolved. Once all discrepancies have been resolved, the temporary PROGRESS (Pre-Final) estimate will be deleted and regenerated as a FINAL estimate.

1. Review project records. As needed, correct quantities using the Quantity Correction plug-in, address any applicable change orders that need to be placed in "Denied" status and make sure that all stockpiled items have been depleted.

2. Generate a PROGRESS (Pre-Final) estimate.

3. Resolve all estimate discrepancies. (Note: Only time and item overrun discrepancies can be left unresolved in this step. These will be addressed in Sections B and C.)

4. Run the Price Adjustment plug-in to add line item adjustments to the estimate. Confirm that all applicable Adjustment Calculation Messages have been resolved.

5. Enter any applicable Key Dates.

6. Send the "Final Estimate Review" Document Submission to Final Records and Materials and Test for their approval.

7. Make any necessary modifications based on the review by Final Records and Materials & Tests.

8. Repeat steps 1-7 as needed until everyone approves the final quantities.

9. View Estimate Discrepancies for the pending estimate. (See previous page for list.)

10. If there are no discrepancies for the pending estimate, skip Sections B and C and go to Section D. If there is a Time Discrepancy, proceed to Section B. If there is an Item Overrun discrepancy, proceed to Section C.

B. Resolving Time Overrun Discrepancy –

This section only applies if the discrepancies for the pending estimate include "Exceeded Adj Compl Date" and "No Physical Work Complete Date." Headquarters Finance Office will remove the time overrun discrepancy at the end of this process. If this section does not apply, go to Section C.

1. Run the SiteManager Item Work Report to determine the Inspector Name & DWR Date of the DWRs that contain the calculations for assessment of LD.

2. If the contractor is due extra days due to overrun of quantities, create a Time Adjustment Change Order (CO type "Time Adjustment Due to Quantity Increase") to extend the time as calculated by the Liquidated Damage Template. List the Inspector Name and DWR Date of the Liquidated Damages DWR as the Change Order Explanation. Leave the Change Order in "DRAFT" status and notify the Finance Office of the Change Order. Finance Office will override approval and approve the Change Order.

   OR

   If the contractor is not due extra days due to overrun of quantities email Finance Office the Contract ID, Inspector Name, and DWR Date of the Liquidated Damages DWR.

3. Headquarter Finance Office will notify Office Staff that the discrepancy has been removed.

C. Resolving Item Overrun Discrepancy –

If there is an Item Overrun Discrepancy, contract your Regional Support person.

D. Final Estimate Generation Process –

There can only be one final estimate per contract. All discrepancies will be resolved by the time the FINAL estimate is generated. Final estimate discrepancies cannot be overridden.

1. Generate the Final Estimate.

2. Run Price Adjustment plug-in to add line item adjustments.

3. District Supervisor approve Final Estimate.

4. Notify Final Records via Document Submission that the Final Estimate is ready for Regional approval.

Updating Key Dates

The user creates the Key Date schedule and the user records the actual occurrence of Key Dates associated with Contract Finalization.

Figure 1. Key Dates Window

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.
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.
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.

Table 1. TDOT Default Key Dates Associated to Contract Finalization

Exercise 1

In this exercise, log in and enter key dates for a contract.

User ID	**jj00032**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		

1. Start and log onto SiteManager as user **jj00032** *while connected in server mode*.

Open the Key Dates window.

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 **Key Dates** icon. The system displays the Select Contract window.

5. In the **Contract ID** column, scroll to and double-click **TRN370e**. The system displays the Key Dates window.

Record an actual date for a key date on a contract.
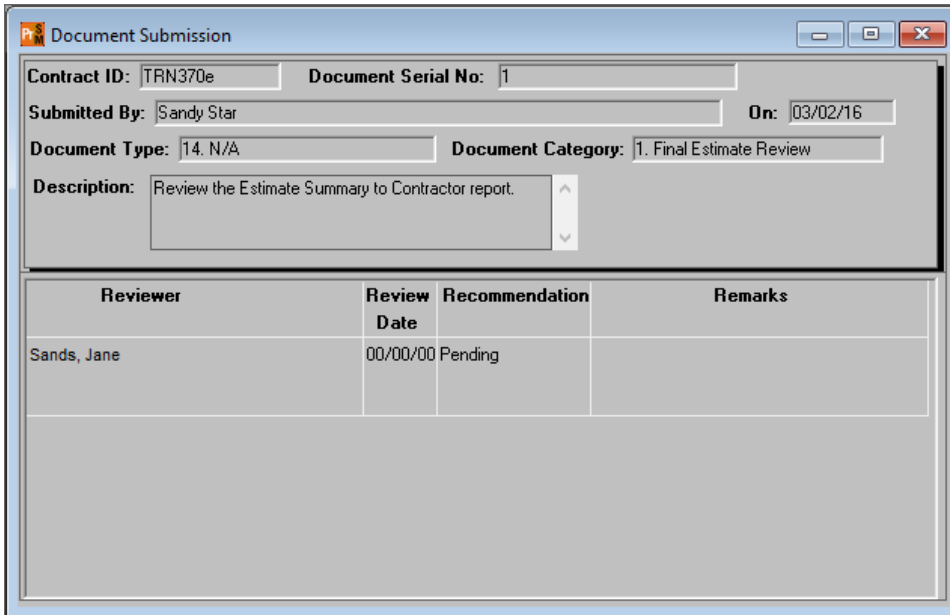
6. In the **Key Date Type** column, scroll to and select **CC-3**.

7. In the **Actual Date** field, type **030216**.

8. **Save**.

9. **Close**. The system displays the Contract Records panel.

You've opened the Key Dates window and recorded an actual date.

Creating a Document Submission of the Final Estimate

The Document Submission panel lets the user track documents that have been submitted for approval or resolution. The user can enter or view the document type, the document category, the submission date, the submitter's name, and a document description. The user can modify or delete a record only if there are no reviewers assigned to the document.

To begin the document review process, the user selects one or more reviewers. The reviewer receives an In-Box notification that the document is ready for review. After reviewing the document, the reviewer records his recommendation on the Review Submitted Document panel. A recommendation cannot be modified after it is saved, but a reviewer can add another recommendation. A new tracking record is created for every new recommendation. The user can track the document reviews in the bottom pane of the Document Submission panel.

Figure 2. Document Submission Window (Before Review)

THE DOCUMENT SUBMISSION WINDOW IS USED TO NOTIFY FINAL RECORDS AND MATERIALS & TESTS TO BEGIN THEIR REVIEW OF THE FINAL SUMMARY TO CONTRACTOR REPORT. IF CHANGES ARE NEEDED, FINAL RECORDS AND/OR M&T WILL DENY THE DOCUMENT SUBMISSION AND REQUEST CHANGES BE MADE BY OFFICE STAFF.

Exercise 2

In this exercise, add a document submission record and forward it for review.

User ID	**jj00032**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN370e**		

1. On the SiteManager Panel window, 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.

Create a Document Submission record.

3. Double-click the **Document Submission** icon. The system displays the Document Submission window.

4. In the **Submitted By** field, type **Sandy Star**.

5. In the **On** field, type **030216**.

6. In the **Document Type** dropdown list, select **14. N/A**.

7. In the **Document Category** dropdown list, select **1. Final Estimate Review**.

8. In the **Description** field, type **Review the Estimate Summary to Contractor report.**

9. **Save**.

Forward for review.

10. From the **Services** menu, select **Forward To**. The system displays the Forward to Selected Users window.

11. In the **User Name** column, scroll to and select **Sands, Jane (jj00033)**.

12. Click **OK**.

13. **Save**. The system displays a message to inform you that the mail has been sent.

14. In the message, click **OK**. In the lower pane, the system displays each reviewer with a 'Pending' recommendation.

Prepare for the next exercise.

15. **Exit SiteManager**.

You've opened the Document Submission window, created a record and forwarded it for review.

Adding Document Reviews

The Document Submission Review panel lets the user enter recommendations for a submitted document. To access this panel, the user must be one of the reviewers assigned to review the document.

The top pane displays the document type, document category, submission date, name of the submitter, and document description. The reviewer adds a recommendation in the bottom pane. The three valid choices are Approved, Approved as Noted, and Denied. The reviewer can add comments in the Remarks field. A recommendation cannot be changed or deleted after it is saved, but the reviewer can add another recommendation. A new record is created for each new recommendation.

YOU CAN ONLY ACCESS THIS WINDOW IF A REVIEW IS DUE FROM YOU.

THE DOCUMENT TO BE REVIEWED CAN BE EITHER HARD COPY OR SOFT COPY. THE DOCUMENT ITSELF IS NOT DISPLAYED ON THIS PANEL.
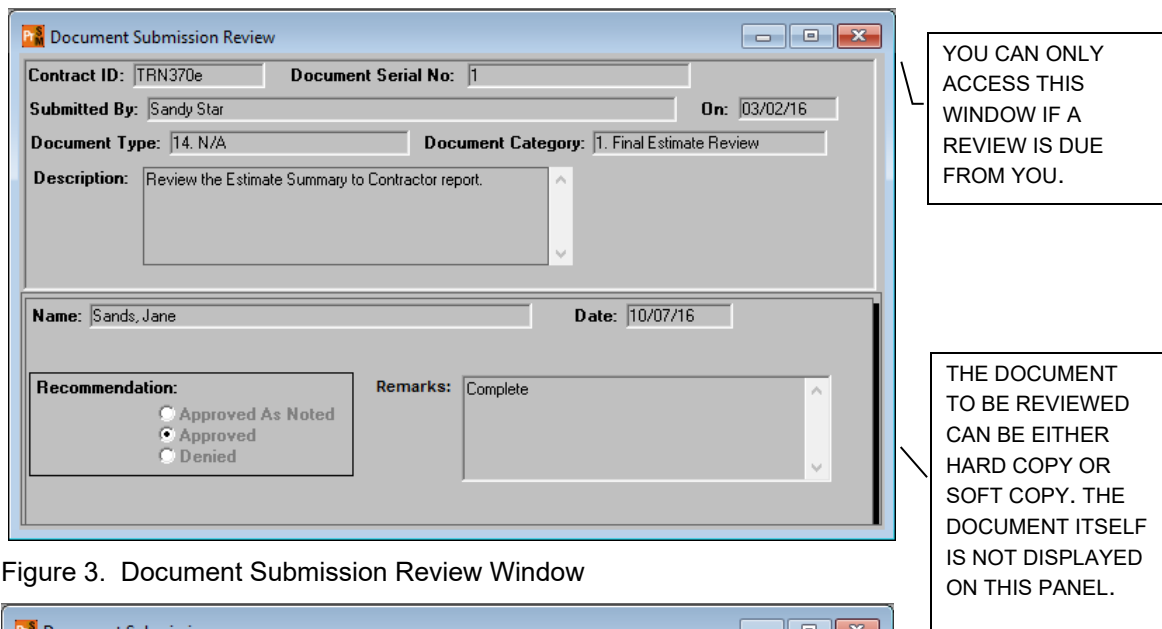
Figure 3. Document Submission Review Window
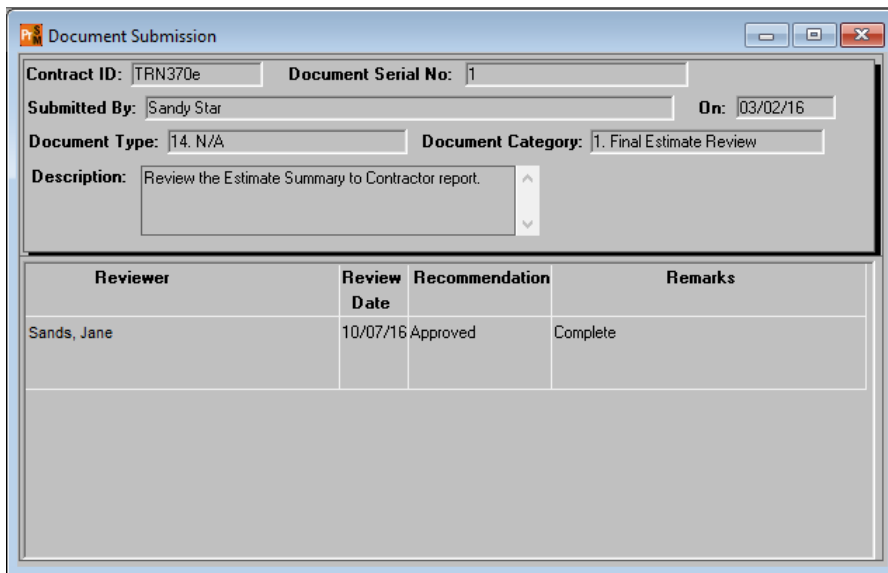
Figure 4. Document Submission Window (After Review)

Exercise 3

In this exercise, add a review record for a submitted document for a contract.

User ID	**jj00033**	Password	**pass**
Connection	**Training Server**		
Group Name	**REG - M&T Final Records [MTFINREC]**		

> SHIFT-TAB IF
> USER ID NOT
> HIGHLIGHTED.

1. Start and log onto SiteManager as user **jj00033** *while connected in server mode*.

View the documents submitted for review for a contract.

2. On the **Main Panel**, double-click the **Contract Administration** icon. The system displays the Contract Administration panel.

3. Double-click the **Contractor Management** icon. The system displays the Contractor Management panel.

4. Double-click the **Document Submission Review** icon. The system displays the Documents Submitted Select window.

5. In the **Contract ID** area, scroll to and double-click **TRN370e**.

Add a review record.

6. In the **Documents Submitted** area, scroll to and double-click the document submitted by **Sandy Star** on **20160302**. The system displays the Document Submission Review window.

7. In the **Recommendation** area, click the **Approved** button.

8. In the **Remarks** field, type **Complete**.

9. **Save**. The system makes the record inquiry-only.

10. **Close**. The system closes the Document Submission Record Review window and displays the Contractor Management panel.

View the tracking of the record.

11. Double-click the **Document Submission** icon. The system displays the Document Submission window.

12. Note the tracking of the reviewer, review date, recommendation and remarks.

Prepare for the next exercise.

13. **Exit SiteManager**.

You've reviewed a document submission record.

Reviewing and Resolving Estimate Discrepancies

The system 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.

ONLY ONE OPTION WITH FINAL EST DISCREPANCIES:

RESOLVE AND RECALCULATE

When the Recalculate Discrepancies function is selected from the Services menu, or if the Estimate is regenerated, the discrepancies are re-determined.
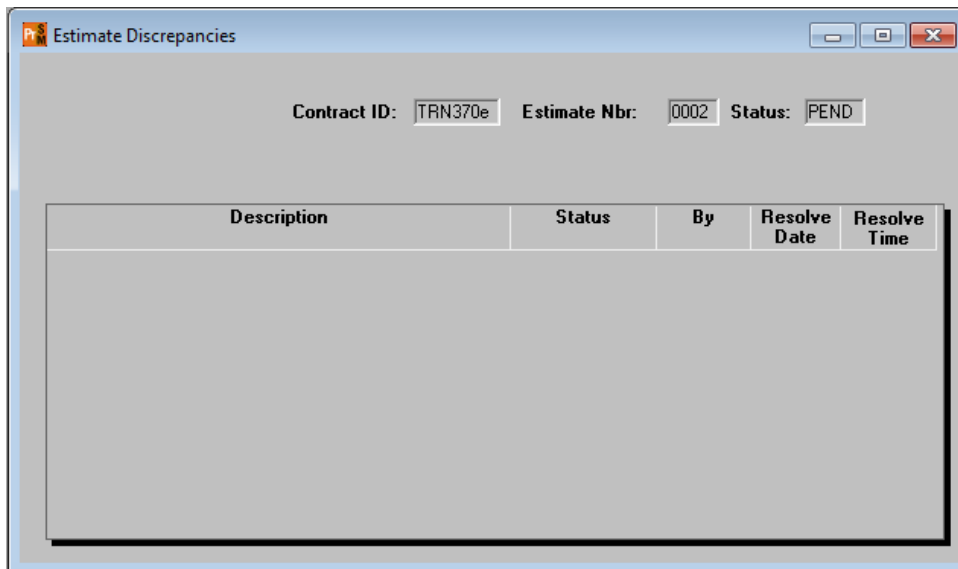
Figure 5. Estimate Discrepancies Window

Figure 6. Navigate Button

ALL DISCREPANCIES MUST BE RESOLVED PRIOR TO GENERATING THE FINAL ESTIMATE. DISCREPANCIES ON THE FINAL ESTIMATE MAY NOT BE OVERRIDDEN. HEADQUARTER FINANCE OFFICE WILL REMOVE THE TIME OVERRUN DISCREPANCY UPON REVIEW OF THE LIQUIDATED DAMAGES DWR TEMPLATE.

Exercise 4

In this exercise, review an estimate discrepancy on an estimate for a contract.

User ID   **jj00032**   Password   **pass**
Connection   **Training Server**
Group Name   **FIELD – Office Staff [OSTAFF]**

> SHIFT-TAB IF
> USER ID NOT
> HIGHLIGHTED.

1. Start and log onto SiteManager as user **jj00032** *while connected in server mode*.

Open the Estimate Discrepancies window.

2. On the **Main Panel** panel, double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

3. Double-click the **Estimates** icon. The system displays the Estimate panel.

4. Double-click the **Estimate Discrepancy** icon. The system displays the Select Contract and Estimate window.

5. In the **Contract** area, in the **Contract ID** column, scroll to and double-click **TRN370e**.

6. In the **Estimate** area, in the **Estimate Number** column, double-click **0002**. The system displays the Estimate Discrepancies window.

7. Are there any discrepancies on this estimate? _____

8. **Close**. The system closes the Estimate Discrepancies window and displays the Estimate panel.

Prepare for the next exercise.

9. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've opened the Estimate Discrepancies window.

Viewing the Change Order

The Change Order window allows an authorized user to do the following:

- Create a new change order by entering new descriptive information for a change order, or

- Maintain the current descriptive information about an existing change order as the status of the change order progresses from Draft through Pending to Approved or Denied.

Figure 7. Change Order Window

IF TIME NEEDS TO BE ADDED DUE TO QUANTITY OVERRUNS, OFFICE STAFF WILL CREATE A TIME ADJUSTMENT CHANGE ORDER OF TYPE "TIME ADJUSTMENT DUE TO QUANTITY INCREASE."

CHANGE ORDER OF TYPE "TIME ADJUSTMENT DUE TO QUANTITY INCREASE" IS USED IN THE FINAL ESTIMATE PROCESS AND IS LEFT IN DRAFT STATUS BY THE OFFICE STAFF.

THE OFFICE STAFF SHOULD NOTIFY THE FINANCE OFFICE WHEN THIS TYPE OF DRAFT CHANGE ORDER IS COMPLETE. THE FINANCE OFFICE WILL OVERRIDE THE APPROVAL RULES, CHANGE THE STATUS TO PENDING, AND APPROVE THE CHANGE ORDER. THIS TYPE OF CHANGE ORDER DOES NOT REQUIRE A SIGNED CHANGE ORDER.

Exercise 5

In this exercise, view a Final Estimate change order.

User ID	**jj00032**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN370e**		

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.

3. Double-click the **Change Orders** icon. The system displays the Change Order window for the current contract.

4. On the toolbar, click the **Open** button. The system displays a message prompting you to save changes.

5. Since there is no need for a new change order, click the **No** button. The system displays the Select Contract and Change Order window.

6. In the **Change Order** area, double-click change order **001**.

7. What type of change order is this? _____

8. View the **Header** and **Time Adjustments** panels.

Prepare for the next exercise.

9. **Close**. The system closes the Change Order window and displays the Change Order Maintenance panel.

10. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've viewed a Final Estimate change order.

Generating the Final Estimate

To generate a final estimate, the user selects the Final type on the Generate Estimate panel. The estimate period start date defaults to the day after the end date of the previous progress estimate, and the estimate period end date defaults to the current date. The estimate can be reviewed on the Estimate Summary panel.

Figure 8. Generate Estimates Panel

THE END DATE FOR THE FINAL ESTIMATE PERIOD SHOULD BE THE DEFAULTED CURRENT DATE FOR THE FINAL ESTIMATE TO INCLUDE ALL AUTHORIZED DWRS. THE END DATE FOR THE FINAL ESTIMATE CAN BE THE SAME AS THE BEGIN DATE.

Exercise 6

In this exercise, generate a final estimate.

User ID	**jj00032**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN370e**		

1. On the **Main Panel** panel, double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

2. Double-click the **Estimate** icon. The system displays the Estimate panel.

3. Double-click the **Generate Estimate** icon. The system displays the Contracts window.

4. In the **Contract** area, in the **Contract ID** column, scroll to and double-click **TRN370e**.

Generate the final estimate.

5. In the **Type** area, click the **Final** button.

6. On the toolbar, click the **Generate Estimate** button. The system displays a message to confirm deletion of the existing estimate.

7. In the message, click **Yes**. The system displays a message to inform you that the process has been submitted.

8. In the message, click **OK**.

9. **Close**. The system closed the Generate Estimate window and displayed the Estimate panel.

> IF YOU GET AN ERROR MESSAGE, DO NOT RECONNECT TO THE SERVER. CLICK NO THEN CLICK OK.

Typically, you would now follow TDOT workflow to ensure the estimate quantities are correct. Run the Price Adjustments Program. These skills are included in the Estimates chapter of this training guide.

Approving a Final Estimate

The system allows the user to approve final estimates if all discrepancies have
been resolved.

Figure 9. Estimate Approval Window

THE ADJUSTMENTS PLUG-IN WILL APPLY THE ESTIMATE APPROVAL FOR THE OFFICE STAFF LEVEL ON THE
ESTIMATE. THE PLUG-IN WILL ALSO BE USED TO RETURN THE ESTIMATE TO PENDING STATUS IF THE ESTIMATE
NEEDS TO BE MODIFIED OR DELETED.

ONCE A FINAL ESTIMATE IS PAID, THE USER MAY NO LONGER RECORD WORK AGAINST THE CONTRACT DAILY
WORK REPORT (DWR).

Exercise 7

In this exercise, give approval for the first-level reviewer for the final estimate for a contract.

Note: This is only necessary in training. The Price Adjustment plug-in has not been set up to work in training.

User ID	**jj00032**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		
Prior Keys	**TRN370e**		

1. Double-click the **Estimate Approval** icon. The system displays the Select Contract/Estimate window.

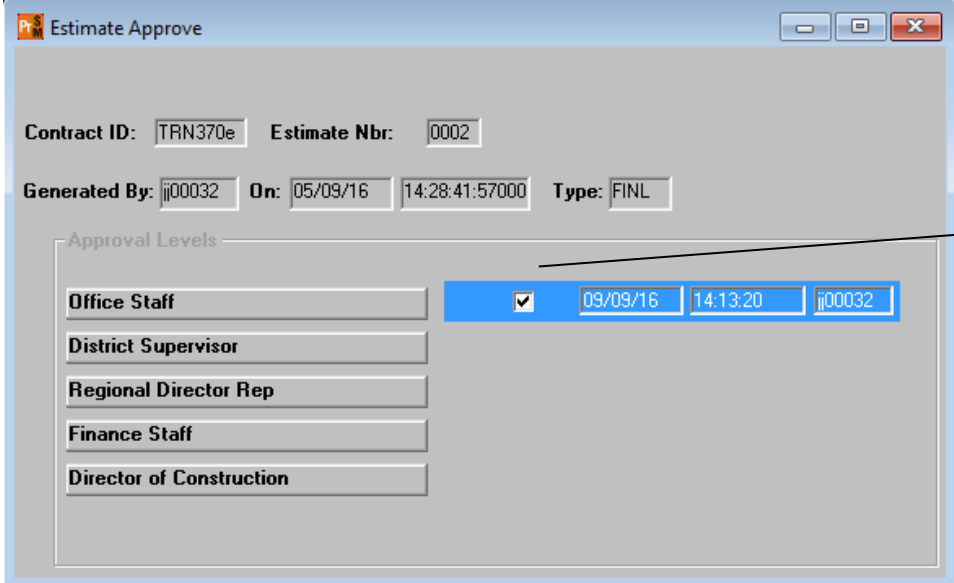2. In the **Contract** area, In the **Contract ID** column, scroll to and double-click **TRN370e**. The system displays the Estimate Approve window.

Give the first-level approval.

3. For the **Office Staff** level, select the **Approved** check box.

4. **Save**.

> PRICE ADJUSTMENT PLUG-IN PROVIDES FIRST-LEVEL OFFICE STAFF APPROVAL.

Prepare for the next exercise.

5. **Close**. The system displays a message to inform that notification was sent to the District Supervisor.

6. In the message, click **OK**. The system closes the Estimate Approve window and displays the Estimate panel.

7. **Exit SiteManager**.

You've given first-level approval.
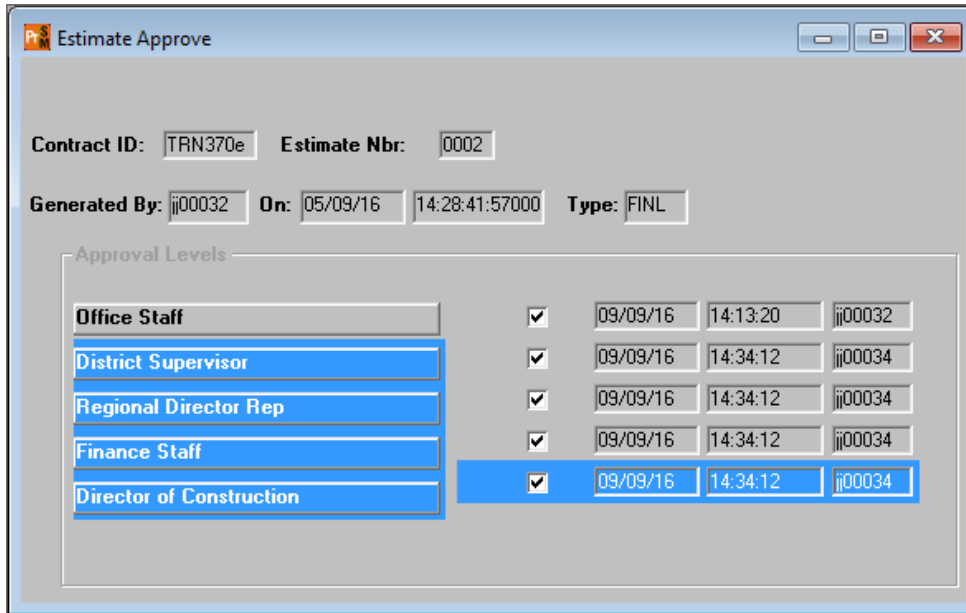
Figure 10. Estimate Approval Window

Exercise 8

In this exercise, log on as the highest-level reviewer and approve the final estimate (skipping the second reviewer).

User ID	**jj00034**	Password	**pass**
Connection	**Training Server**		
Group Name	**HQ - Director of Construction [DIRCON]**		

1. Start and log onto SiteManager as user **jj00034** *while connected in server mode*.

Open the Estimate Approve window.

2. On the **Main Panel** panel, double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

3. Double-click the **Estimate** icon. The system displays the **Estimate** panel.

4. Double-click the **Estimate Approval** icon. The system displays the Select Contract/Estimate window.

5. In the **Contract** area, in the **Contract ID** column, scroll to and double-click **TRN370e**.

THIS EXERCISE SHOWS THAT THE HIGHEST-LEVEL REVIEWER CAN APPROVE THE ESTIMATE FOR LOWER-LEVEL REVIEWERS.

Give the second-level approval.

> 6. For the **District Supervisor**, select the **Approved** checkbox.

Give the third-level approval.

> 7. For the **Regional Director Rep**, select the **Approved** checkbox.

Give the fourth-level approval.

> 8. For the **Finance Staff**, select the **Approved** checkbox.

Give the fifth- and final-level approval.

> 9. For the **Director of Construction**, select the **Approved** checkbox.
>
> 10. **Save**. The system displays a message to inform that the process has been submitted.
>
> 11. In the message, click **OK**.

Prepare for the next exercise.

> 12. **Exit SiteManager**.

You've given final approval for the final estimate.

IF YOU GET AN ERROR MESSAGE, DO NOT RECONNECT TO THE SERVER. CLICK NO THEN CLICK OK.

ALL ESTIMATES IN TRAINING ARE FAKED.

Summary

To update key dates:

1. On the **Contract Records** panel, double-click the **Key Dates** icon.

2. In the **Actual Date** field, type the date the key date event was completed.

3. **Save**.

To add a document submission record:

1. On the **Contractor Management** panel, double-click the **Document Submission** icon.

2. From the **Services** menu, select **Choose Keys**.

3. In the **Contract ID** column, scroll to and double-click the desired contract.

4. In the **Submitted By** field, type the name of the person submitting the document.

5. In the **On** field, type the date on which the document was submitted.

6. In the **Document Type** dropdown list, select the desired document type.

7. In the **Document Category** dropdown list, select the desired document category.

8. In the **Description** field, type a description of the document.

9. **Save**.

To assign a document reviewer:

1. On the **Contractor Management** panel, double-click the **Document Submission** icon.

2. Click the **Open** button. The system displays the Document Submitted Select window.

3. In the **Select Contract** area, in the **Contract ID** column, scroll to and double-click the desired contract ID.

4. In the **Documents Submitted** area, scroll to and click the document.

5. Click **OK**.

6. From the **Services** menu, select **Forward To**.

7. In the **Forward to Selected Users** area, scroll to and click the reviewer.

8. Click **OK**. The system displays a message to inform that mail has been sent.

9. Click **OK**.

10. To select another reviewer, repeat Steps 6 through 9.

11. **Save**. The system displays each reviewer in the bottom pane with a 'Pending' recommendation.

To review a submitted document:

1. Receive notification by In-Box message that the document is ready for review.

2. Review the document, which could be either hard copy or soft copy.

3. On the **Contractor Management** panel, double-click the **Document Submission Review** icon. The system displays the Documents Submitted Select window.

4. In the **Select Contract** area, scroll to and double-click the desired contract ID.

5. In the **Submitted Document** area, scroll to and click the document.

6. Click **OK**. The system displays information about the submitted document in the Document Submission Review panel.

7. In the **Recommendation** area, click the **Approved**, **Approved As Noted**, or **Denied** button.

8. In the **Remarks** field, type comments to add to the review.

9. **Save**.

10. To add another review, click the **New** button and repeat Steps 7 through 9.

To generate a final estimate:
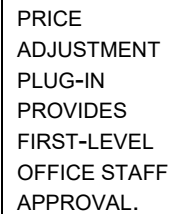
1. On the **Estimate** panel, double-click the **Generate Estimate** icon.

2. Scroll to and click the desired contract.

3. Click **OK**.

4. Click the **Final** button.

5. On the calendar, click the end date if desired.

6. Click the **Generate Estimate** button.

7. Click **OK**.

To view the estimate discrepancies:

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon.

2. On the **Select Contract and Estimate** window, scroll to and double-click the desired contract and the desired estimate.

3. Click **OK**. The system displays the Estimate Discrepancies window.

To approve an estimate:

1. On the **Estimate** panel, double-click the **Estimate Approval** icon.

2. Scroll to and double-click the desired contract and the desired estimate.

3. Select the **Approved** check box for your level.

4. Click **OK**.

5. **Save**.

PRICE ADJUSTMENT PLUG-IN PROVIDES FIRST-LEVEL OFFICE STAFF APPROVAL.

Review Exercise

In this exercise, review the steps in the Contract Finalization process.

User ID	**jj00032**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		

> SHIFT-TAB IF USER ID NOT HIGHLIGHTED.

1. Start and log onto SiteManager as user **jj00032** *while connected in server mode*.

2. Navigate to the Key Dates window for contract **TRN370f**.

3. What is the actual date of the **Final Inspection**?
   _____

4. Navigate to the Document Submission window.

5. Create a Document Submission record for contract **TRN370f**. Be creative in completing the fields.

6. Navigate to the window used to generate a final estimate for **TRN370f**.

7. What is the name of this window?
   _____

8. In what ways do Final estimates differ from regular Progress estimates?
   _____

9. Navigate to the Estimate History window.

10. What is the status of the Final estimate for contract **TRN370e**?
    _____
    _____

11. **Exit SiteManager**.

Finalizing Contracts for Office Documentation

Preparing for and Generating Supplemental Estimates for Office Documentation

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

TDOT Supplemental Estimate Workflow

1. Create a Document Submission record for the Supplemental Estimate.

2. Forward the Document Submission Record to Final Records and Materials and Tests.

3. Verify approval of the Document Submission by Final Records, Materials and Tests, and the designated Operations representative.

4. Generate a Supplemental Estimate for the necessary lump sum payment amount. Supplemental Estimates can only be done AFTER a Final Estimate has been paid.

AFTER THE FINAL ESTIMATE HAS BEEN PAID, SUPPLEMENTAL ESTIMATES MAY BE GENERATED TO MAKE LUMP SUM PAYMENTS FOR A SPECIFIC AMOUNT. THERE IS NO LIMIT TO THE NUMBER OF SUPPLEMENTAL ESTIMATES THAT MAY BE GENERATED IN SITEMANAGER.

OFFICE STAFF MUST DOCUMENT THE REASON FOR THE SUPPLEMENTAL ESTIMATE IN THE DESCRIPTION FIELD OF THE DOCUMENT SUBMISSION WINDOW, INCLUDING HOW THE AMOUNT WAS CALCULATED (INCLUDING ITEM, PROJECT AND CATEGORY) AND WHAT THE SUPPLEMENTAL PAYMENT AMOUNT IS. THE COUNTY SHOULD ALSO BE INDICATED IN THE DESCRIPTION FIELD. USE THE "SUPPLEMENTAL ESTIMATE REVIEW" AS DOCUMENT CATEGORY.

THE DOCUMENT SUBMISSION FEATURE IS USED TO NOTIFY FINAL RECORDS AND MATERIALS AND TESTS OF THE SUPPLEMENTAL ESTIMATE AND TO GET THEIR APPROVAL FOR PAYMENT. UPON NOTIFICATION TO REVIEW THE ESTIMATE, FINAL RECORDS AND M & T WILL VIEW THE DESCRIPTION IN THE DOCUMENT SUBMISSION REVIEW AND COMPARE TO THE FINAL ESTIMATE (CHECK CALCULATIONS AND, IF APPLICABLE, NEW QUANTITIES FOR TEST REPORTS).

AFTER ENSURING M&T'S APPROVAL IN DOCUMENT SUBMISSION WINDOW, FINAL RECORDS WILL GIVE THEIR APPROVAL , ENTER THE SUPPLEMENTAL PAYMENT AMOUNT AND THE FINAL TOTAL CONTRACT PAYMENT AMOUNT INTO THE REMARKS FIELD OF THE DOCUMENT SUBMISSION REVIEW WINDOW AND APPROVE THE DOCUMENT SUBMISSION.

THE DOCUMENT SUBMISSION IS THEN FORWARDED TO THE DESIGNATED OPERATIONS REPRESENTATIVE FOR APPROVAL PRIOR TO PAYMENT.

AFTER THE DOCUMENT SUBMISSION HAS THE APPROVAL OF FINAL RECORDS, MATERIALS AND TESTS, AND THE DESIGNATED OPERATIONS REPRESENTATIVE, FINAL RECORDS WILL NOTIFY THE FIELD OFFICE THAT THE SUPPLEMENTAL ESTIMATE MAY BE APPROVED BY THE OFFICE STAFF AND CONTINUE THROUGH THE ESTIMATE APPROVAL PROCESS.

Creating a Document Submission of the Supplemental Estimate

To begin the document submission review process, the user selects one or more reviewers. The reviewer receives an In-Box notification that the document is ready for review. After reviewing the document, the reviewer records his recommendation on the Review Submitted Document panel. A recommendation cannot be modified after it is saved, but a reviewer can add another recommendation. A new tracking record is created for every new recommendation. The user can track the document reviews in the lower pane the Document Submission panel.
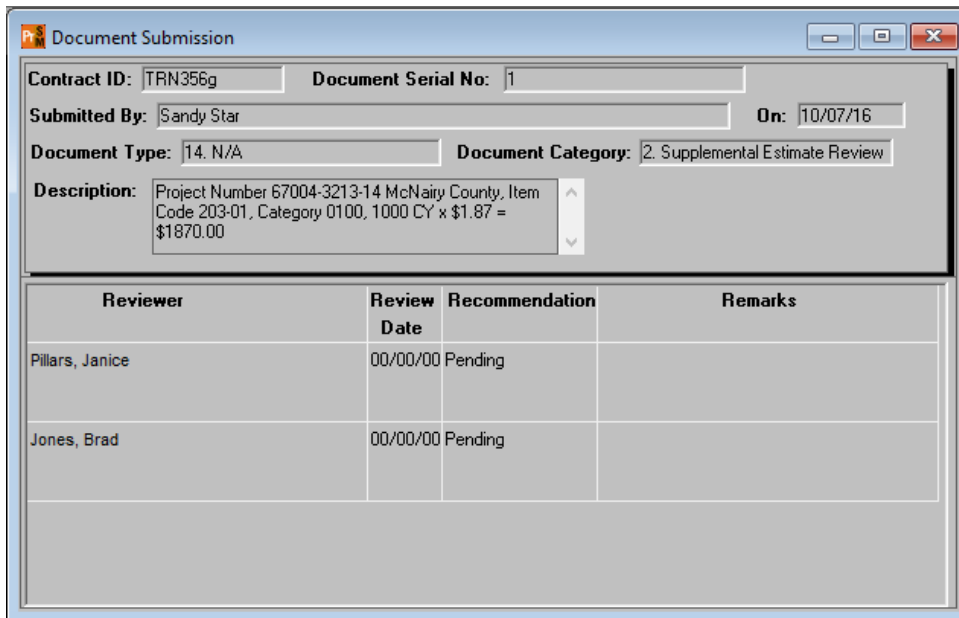
Figure 1. Document Submission Window

THE DOCUMENT SUBMISSION PANEL IS USED TO SUBMIT SUPPLEMENTAL ESTIMATES FOR REVIEW BY FINAL RECORDS, MATERIAL & TESTS, AND THE REGIONAL CONSTRUCTION SUPERVISOR PRIOR TO STARTING THE ESTIMATE APPROVAL PROCESS.

A DOCUMENT SUBMISSION WITH THE CATEGORY OF SUPPLEMENTAL ESTIMATE REVIEW SHOULD BE CREATED BEFORE THE SUPPLEMENTAL ESTIMATE IS GENERATED. THIS DOCUMENT SUBMISSION SHOULD BE FORWARDED TO FINAL RECORDS AND MATERIALS & TESTS.

FINAL RECORDS WILL FORWARD TO THE OPERATIONS ENGINEER AND AFTER APPROVAL TO THE OFFICE STAFF.

WHEN THE OFFICE STAFF RECEIVES THIS DOCUMENT SUBMISSION NOTIFYING THEM OF FINAL RECORDS APPROVAL, THEY WILL GENERATE AND APPROVE THE SUPPLEMENTAL ESTIMATE AT THE FIRST LEVEL.

Exercise 1

In this exercise, add a document submission record and forward it for review.

User ID	**jj00032**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Office Staff [OSTAFF]**		

1. Start and log onto SiteManager as user **jj00032** *while connected in server mode*.

Open the Document Submission window.

2. On the **Main Panel** panel, double-click the **Contract Administration** icon. The system displays the Contract Administration panel.

3. Double-click the **Contractor Management** icon. The system displays the Contractor Management panel.

4. Double-click the **Document Submission** icon. The system displays the Document Submission window.

Choose the contract.

5. From the **Services** menu, select **Choose Keys**. The system displays the Document Submitted Select window.

6. In the **Contract ID** area, in the **Contract ID** column, scroll to and double-click **TRN356g**. The system displays the Document Submission window.

Create a record.

7. In the **Submitted By** field, type **Sandy Star**.

8. In the **On** field, type < **today's date >**.

9. In the **Document Type** dropdown list, select **14. N/A**.

10. In the **Document Category** dropdown list, select **2. Supplemental Estimate Review**.

11. In the **Description** field, type **Project Number 67004-3213-14 McNairy County, Item Code 203-01, Category 0100, 1000 CY x $1.87 = $1870.00**.

12. **Save**.

Forward it to a Materials and Tests reviewer.

13. From the **Services** menu, select **Forward To**. The system displays the Forward to Selected Users window.

14. In the **User Name** column, scroll to and select **Pillars, Janice**.

15. Click **OK**. The system closes the Forward to Selected Users window and displays the Document Submission window.

16. **Save**. The system displays a message to inform you that the mail has been sent.

17. In the message, click **OK**. The system displays each reviewer in the lower pane with a 'Pending' recommendation.

Forward it to a Final Records reviewer.

18. From the **Services** menu., select **Forward To**. The system displays the Forward to Selected Users window.

19. In the **User Name** column, scroll to and select **Jones, Brad**.

20. Click **OK**. The system closes the Forward to Selected Users window and displays the Document Submission window.

21. **Save**. The system displays a message to inform you that the mail has been sent.

22. In the message, click **OK**. The system displays each reviewer in the lower pane with a 'Pending' recommendation.

23. **Exit SiteManager**.

You've created a document submission record and forwarded it to a Materials and Tests person and a Final Records person for review.

CTRL-CLICK MAY ALSO BE USED TO SELECT MULTIPLE REVIEWERS AT ONCE.

Adding Document Reviews

The Document Submission Review window lets the user enter recommendations for a submitted document. To access this panel, the user must be one of the reviewers assigned to review the document. When a submitted document is forwarded for review, the system notifies all reviewers by In-Box message that the document is ready for review.

The top pane displays the document type, document category, submission date, name of the submitter, and document description. The reviewer adds a recommendation in the lower pane. The three valid choices are Approved, Approved as Noted, and Denied. The reviewer can add comments in the Remarks field. A recommendation cannot be changed or deleted after it is saved, but the reviewer can add another recommendation. A new record is created for each new recommendation.

Figure 2. Document Submission Review Window

Exercise 2

In this exercise, review a submitted document for Materials and Tests.

User ID	**jj00036**	Password	**pass**

Connection   **Training Server**

Group Name   **REG – M&T Supervisor [MTSUP]**

1. Start and log onto SiteManager as user **jj00036** *while connected in server mode*. The system displays the Available Groups for < > window.

2. In the **Group Name** column, double-click **REG – M&T Supervisor**. The system displays the SiteManager Panel window.

View the documents submitted for review.

1. On the **Main Panel** panel, double-click the **Contract Administration** icon. 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 **Document Submission Review** icon. The system displays the Document Submitted Select window.

4. In the **Contract ID** column, scroll to and double-click **TRN356g**.

5. In the **Documents Submitted** area, in the **Document S. No** (Document Serial Number) column, scroll to and double-click **1**.

Add a review record.

6. In the **Recommendation** area, click the **Approved** button.

7. In the **Remarks** field, type **OK**.

8. **Save**.

9. **Exit SiteManager**.

You've added a review record for Materials and Tests.
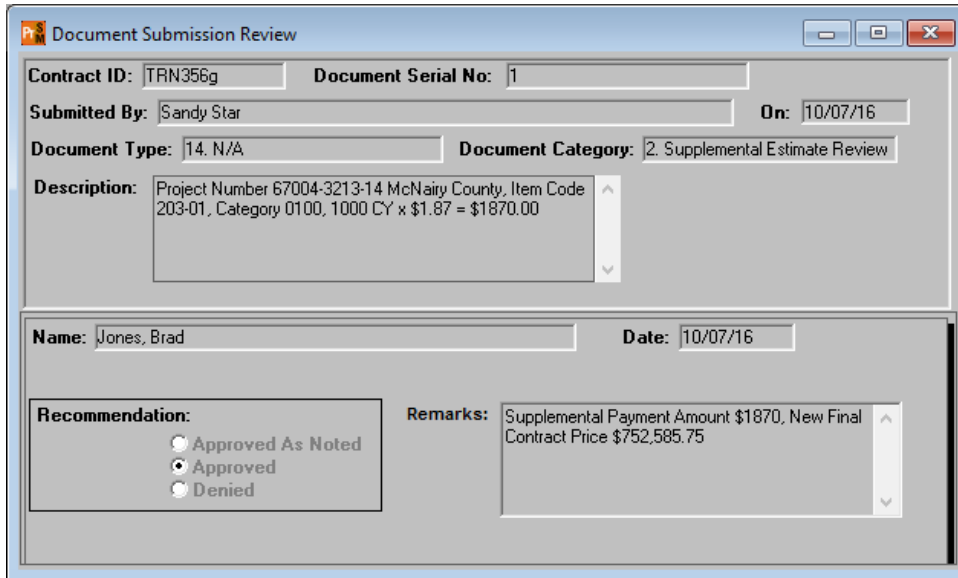
Figure 3. Document Submission Review Window

Exercise 3

In this exercise, review a submitted document for Final Records.

User ID	**jj00037**	Password	**pass**
Connection	**Training Server**		
Group Name	**REG – Construction Final Records [FRECSTF]**		

1. Start and log onto SiteManager as user **jj00037** *while connected in server mode*.

Open the Document Submission Review window.

2. On the **Main Panel** panel, double-click the **Contract Administration** icon. The system displays the Contract Administration panel.

3. Double-click the **Contractor Management** icon. The system displays the Contractor Management panel.

4. Double-click the **Document Submission Review** icon. The system displays the Documents Submitted Select window.

5. In the **Contract ID** area, in the **Contract ID** column, scroll to and double-click **TRN356g**.

6. In the **Documents Submitted** area, in the **Document S. No** (Document Serial Number) column, scroll to and double-click **1**.

Add a review record.

7. In the **Recommendation** area, click the **Approved** button.

8. In the **Remarks** field, type **Supplemental Payment Amount $1870, New Final Contract Price $752,585.75**.

9. **Save**.

10. **Exit SiteManager**.

You've added a review record for Final Records.

Viewing Document Submission Recommendations

Use the Document Submission window to view and track document reviews.

Figure 4. Document Submission Window

Exercise 4

In this exercise, view the review records for a submitted document.

User ID	**jj00032**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		

1. Start and log onto SiteManager as user **jj00032** *while connected in server mode*.

Open the Document Submission window.

2. On the **Main Panel** panel, double-click the **Contract Administration** icon. The system displays the Contract Administration panel.

3. Double-click the **Contractor Management** icon. The system displays the Contractor Management panel.

4. Double-click the **Document Submission** icon. The system displays the Document Submission window.

5. On the toolbar, click the **Open** button. The system displays the Document Submitted Select window.

6. In the **Contract ID** area, in the **Contract ID** column, scroll to and double-click **TRN356g**.

View the list of reviewers.

7. In the **Documents Submitted** area, in the **Document S. No** (Document Serial Number) column, scroll to and double-click **1**.

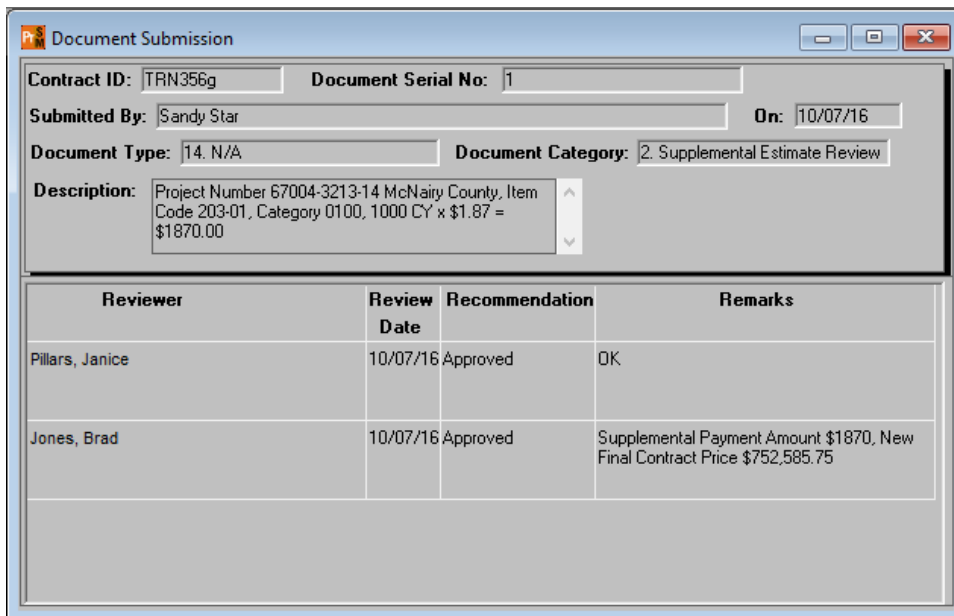8. Have both Materials & Tests and Final Records approved the document submission?

    _____

9. **Close**. The system closes the Document Submission window and displays the Contractor Management panel.

Prepare for the next exercise.

10. Click the **Main Panel** tab. The system displays the Main Panel panel.

You've acquired approval from Final Records and Materials & Tests. You may now generate and approve the supplemental estimate.

Generating a Supplemental Estimate

After the final estimate, it may be necessary to pay an additional amount to the contractor. To track this payment in SiteManager, it is necessary to generate a supplemental estimate. You can continue to generate an unlimited number of supplemental estimates if the contract status remains active.
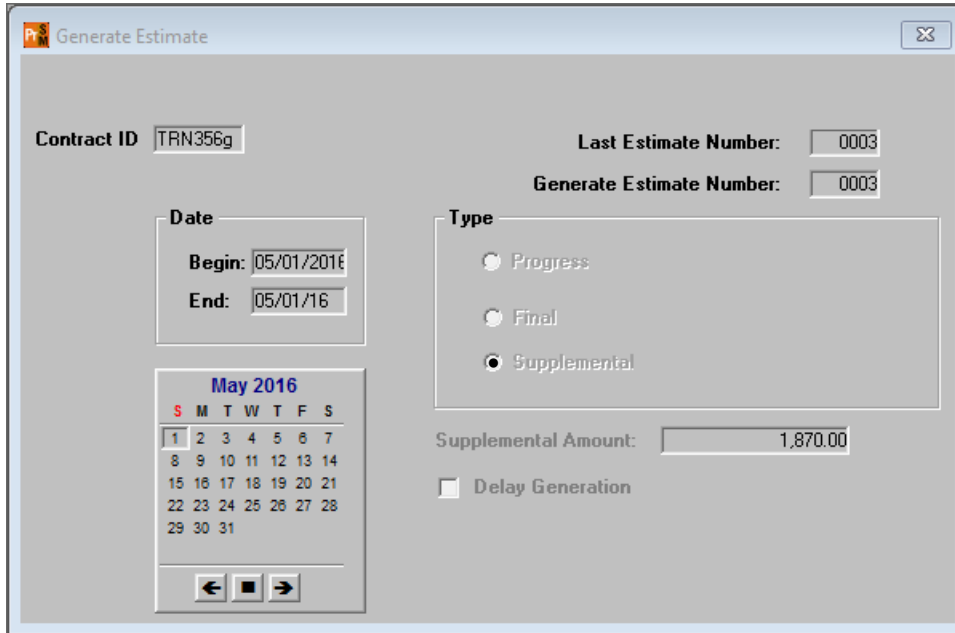
Figure 5. Generate Estimate Window

 Exercise 5

In this exercise, generate a supplemental estimate.

User ID	**jj00032**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		

1. On the **Main Panel**, double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

2. Double-click the **Estimate** icon. The system displays the Estimate panel.

3. Double-click the **Generate Estimate** icon. The system displays the Contracts window.

4. In the **Contract** area, in the **Contract ID** column, scroll to and double-click **TRN356g**.

Generate the supplemental estimate.

5. In the **Type** area, note that the **Supplemental** button has been selected.

6. In the **Date** area, in the **End** field, type **050116** (the same date as begin date)

7. In the **Supplemental Amount** field, type **1870.00.**

8. On the toolbar, click the **Generate Estimate** button. The system displays messages to inform that the process has been submitted.

9. In the message about the process submission, click **OK**.

10. **Close**. The system closes the Generate Estimate window and displays the Estimate panel.

> IF YOU GET AN ERROR MESSAGE, DO NOT RECONNECT TO THE SERVER. CLICK NO THEN CLICK OK.

Prepare for the next exercise.

11. Click the **Main Panel** tab. The system displays the Main Panel panel.

All estimate approvals are entered in the Estimate Approval window as described in the 'Estimates Basics and Progress Estimates for Office Documentation' and 'Contract Finalization for Office Documentation' sections of this training manual.

Summary

To add a document submission record:

1. On the **Contractor Management** panel, double-click the **Document Submission** icon.

2. From the **Services** menu, select **Choose Keys**.

3. In the **Contract ID** area, scroll to and double-click the desired choice.

4. In the **Submitted By** field, type the name of the person submitting the document.

5. In the **On** field, type the date on which the document was submitted.

6. In the **Document Type** dropdown list, select the desired document type.

7. In the **Document Category** dropdown list, select the desired document category.

8. In the **Description** field, type a description of the document.

9. **Save**.

To assign a document reviewer:

1. On the **Contractor Management** panel, double-click the Document Submission icon.

2. Click the **Open** button.

3. In the **Select Contract** area, scroll to and double-click the Contract ID.

4. In the **Documents Submitted** area, scroll to and click the document.

5. Click **OK**. The system displays the Document Submission panel with information about the submitted document.

6. From the **Services** menu, select **Forward To**.

7. In the **Forward to Selected Users** area, scroll to and click the reviewer.

8. Click **OK**. A message says 'Mail sent.'

9. Click **OK**.

10. To select another reviewer, repeat Steps 6 through 9.

11. **Save**. The system displays each reviewer in the lower pane with a 'Pending' recommendation.

To review a submitted document:

1. Receive notification by In-Box message that the document is ready for review.

2. Review the document, which could be either hard copy or soft copy.

3. On the **Contractor Management** panel, double-click the **Document Submission Review** icon. The system displays the Documents Submitted Select window.

4. In the **Select Contract** list box, scroll to and double-click the Contract ID.

5. In the **Submitted Document** list box, scroll to and click the document.

6. Click **OK**. The system displays the Document Submission Review panel with information about the submitted document.

7. In the **Recommendation** area, click the **Approved**, **Approved As Noted**, or **Denied** button.

8. In the **Remarks** field, type comments to add to the review.

9. **Save**.

10. To add another review, click the **New** button and repeat Steps 7 through 9.

To generate a supplemental estimate:

1. On the **Estimate** panel, double-click the **Generate Estimate** icon.

2. Scroll to and click the desired contract.

3. Click **OK**.

4. Click the **Supplemental** button.

5. In the **Supplemental Amount** field, type the desired supplemental amount.

6. On the calendar, click the end date if desired.

7. Click the **Generate Estimate** button.

8. Click **OK**.

To approve a supplemental estimate:

1. On the **Estimate** panel, double-click the **Estimate Approval** icon.

2. In the list box, scroll to and click the desired record.

3. Click the **Approved** check box for your level.

4. Click **OK**.

5. **Save**.

6. When complete, click the **Close** button.

Review Exercise

In this exercise, review the supplemental estimate process.

User ID	**jj00032**	Password	**pass**
Connection	**Training Server**		
Group Name	**FIELD – Operations Office Staff [OSTAFF]**		
Prior Keys	**TRN356g**		

1. What is the first step in the Supplemental Estimate process and what window in SiteManager is used for this step? _____

    _____
    _____

2. Create a new Document Submission record for a supplemental estimate.

3. Forward the Document Submission record to **Kim Brady** and **Casey Miller**.

4. **Exit SiteManager.**

5. Log in as **jj00038**.

6. Review the Document Submission created in step 2 above.

7. **Exit SiteManager**.

8. Log in as **jj00040**

9. Review the Document Submission Recommendation created in step 6 above.

10. **Exit SiteManager**.

Answers

This section contains the answers to Office Staff course exercise questions.

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

Activating Contracts for Office 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.   2.94%

Exercise 9

    5.   SR-84; EXIST. SR-85, FROM NEAR WINDLE RD. TO SR-84

    6.   State Route 84

Exercise 10

    5. $50.00000

    6. 11,179.000

    10. (SEE PLANS DESCRIPTION)

Exercise 11

    4. 1.00000

    5. $0.000

Exercise 13

    4. Four

    5. Two

    7. 07/10/14

    8. No, because the Parent Subcont Nbr field is blank.

Exercise 14

    2. Four

    3. Quantity: 5,000.000, Amount: $202,000.00

Review Exercise

    3. Region 2, Unit 723

    4. 05/16/14

    5.   Hudson Insurance Co.

    8. No. It has a bid quantity. An add-on item will never have a bid quantity.

    11. Tennessee Texture, LLC

    12. Yes

    13. Yes, the Approval Date field has been populated.

Initializing Contracts for Office Documentation

Exercise 1

20. So that a notice will go to the District Supervisor if the Actual Date is not entered on or before 04/03/16.

Maintaining Contracts for Office Documentation

Exercise 2

14. $12,788.07248

Exercise 5

5. The sample ID should be unique for each student.

Test Templates to Material Categories

Not applicable.

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

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 Estimates Basics and Progress Estimates for Office Documentation

Exercise 1

1. 126.000
2. 125.000
3. 1200.00
4. MARION CO. ST RT 27, WBL 19.5
5. 11/16/2015

Exercise 3

5. $1,412,011.08
6. Yes

Exercise 4

2. 5

Exercise 6

5. 4

Exercise 8

1. -0.040
2. 0.960
3. -0.260
4. T310

Exercise 12

9. Mix design asphalt percentage

Exercise 13

    11. Yes

    12. 307-01.08

Exercise 14

    2. Yes

    5. Yes

Exercise 15

    2. There are fuel adjustments on 303-01, 307-01.01, 307-01.08 and 411-01.07; three items are fully paid; however, 307-01.01 is partially paid due to material shortage.

Exercise 16

    2. No. All three bituminous items are below 5% (1.62%) so no payment adjustments were made.

Exercise 17

    2. Partial payment due to material shortage is on 307-01.01 for 307a/c; however 307-01.08 is fully paid on 307 a/c.

Exercise 18

    2. Yes. All the tons were adjusted because there were no material deductions.

Exercise 19

    2. No. No payments for anti-strip items on this estimate.

Exercise 20

    7. -20,000.00

    9. -467.71

Exercise 21

6. 70.100

7. 70.100

9. 5,500.000

10. 5,500.000

12. 929.000

13. 929.000

Exercise 22

4. No

7. Yes, for -20,000.00

Exercise 23

1. $1,433,841.78

2. Yes

3. $-25,218.44

4. No

5. 1400

6. -400

7. -20,000.00

Exercise 24

7. $1,412,011.08

Exercise 25

2. 02/19/16

3. jj00029

Exercise 26

    6. PEND - Pending

    7. $1,412,011.08

Exercise 27

    16. PEND - Pending

Exercise 29

    2. CNJ363 and CNJ287

    3. Yes

Exercise 31

    10. -.600

Review Exercise

    1. Yes

    3. $1,437,229.52

    4. Yes

    6. Overrun, Checklist Event and Deficient Tested Material

    11. 4

    13. 3

    16. 1,400.00

Creating Disputes/Claims (Contract Change Requests) and Correspondence Logs for Office Documentation

Not applicable.

Understanding Change Orders for Office Documentation (Part 1)

Exercise 2

17. $25,500.00

Exercise 3

26. $25,200.00

Exercise 4

14. $0.00

Exercise 6

5. Additional Traffic Control

6. $25,500.00

Review Exercise

6. $51,800.00

Understanding Change Orders for Office Documentation (Part 2)

Exercise 4

5. Yes

Exercise 5

3. Holden, Berry

Review Exercise

7. jj00024 Burton, Mike

Finalizing Contracts for Office Documentation

Exercise 4

7. No

Exercise 5

7. Time Adjustment due to Quantity Increase

Review Exercise

3. 04/17/16

7. Generate Estimate

8. Only one, no discrepancies, no more DWRs

10. APRV (Approved) or INAP (In Approval) if last exercise not completed

Preparing for and Generating Supplemental Estimates for Office Documentation

Exercise 4

8. Yes

Review Exercise

1. Document the need for additional payment; Document Submission window.

Answers