SiteManager for Management Personnel

Student Guide

Release 3.6a

May 2007

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Prepared by

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Objectives

In this course, you will learn the following:

- Start and Exit SiteManager
- Navigate in SiteManager
- Open and control the display of multiple SiteManager components
- Close SiteManager components
- Change your password
- Identify update and inquiry display
- Use Open, New, and ‘Choose Keys’
- Use, Sort, Find, and Filter
- View System Attachments
- Identify Support Resources
- Use Online Help
- View the User Manual
- Access Reports
- Run a Process
- Access TDOT Custom Reports
- View an active Contract
- View Subcontracts
- Understand the Basic Concepts of Daily Work Reports
- View DWR
- View Diary
- View In-Box Estimate Message
- View the Estimate Summary

- View Estimate Discrepancies
- Generate the Summary To Contractor Report
- Approve Estimates
- Track Estimates
- Understand the Rules and Life Cycle of Change Orders
- View a Change Order Header
- View Change Order Time Adjustments
- View Modifications to Contract Items
- View the Custom Change Order
- View the Change Order Report
- Approve Change Orders
- Track Change Orders

Table of Contents

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Section 1 Getting Started
for Management Personnel

By the end of this module, you will be able to:

- Start and Exit SiteManager
- Navigate in SiteManager
- Open and control the display of multiple SiteManager components
- Close SiteManager components
- Change your password
- Identify update and inquiry display
- Use Open, New, and ‘Choose Keys’
- Use, Sort, Find, and Filter
- View System Attachments
- Identify Support Resources
- Use Online Help
- View the User Manual
- Access Reports
- Run a Process
- Access TDOT Custom Reports

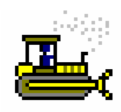
May 2007

Using the Student Guide

The student guides are divided into sections — learning modules. Each learning module consists of:

- Objectives
- Multiple Topics and Instructor-Led Exercises
- Review
- Summary Exercise

Each section will begin with the objectives for the module. The module will be divided into topics roughly corresponding to the objectives of the module. Each topic will have a short description of the SiteManager function, one or more general procedures about how to perform an action in SiteManager, and an instructor-led exercise for the topic. Instructor-led exercises are easy to spot on each page. Instructor-led exercises are identified by the Bulldozer graphic illustrated below and are numbered sequentially. Instructor-led exercises are very explicit and detail the specific steps and data to be used in performing the action.



Exercise 5-2

Instructor-led Exercises are identified by the Bulldozer graphic.

Figure 1-1

Each module will end with a review and a summary exercise. The review will summarize the main points and *all of the SiteManager functionality covered in the module*. The review pages may serve as an excellent reference for the summary exercise that follows the review. It may also server as a work aid for use back at the office.

The summary exercise gives you the opportunity to practice the skills you learned in the learning module. The summary exercise instructions will provide you with the data to be used and general instructions. Remember that the module review on the pages immediately preceding the summary exercise is composed of the general procedures covered in the module. The review will serve as a good reference as you perform the summary exercise.

SiteManager Procedures, the steps you follow to access a component of SiteManager, vary depending on whether you have just entered the system or have been in some other component and have already selected a common variable.

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 Contact selected, and then navigate to the Contractor Payments component, the Estimate Summary window displays the Estimates for the Contract previously selected in Contract Records.

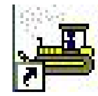
The procedures in this manual describe how to access components of SiteManager as if you just entered the application.

In TDOT, there are three Student Guides:

- **SiteManager for Office Documentation**
- **SiteManager for Field Documentation**
- **SiteManager for Management Personnel**

Starting AASHTO SiteManager

The AASHTO SiteManager Construction Management System will run on several different windows graphical User interfaces. For your operating system, you will start AASHTO SiteManager the same way you would any program on your computer.

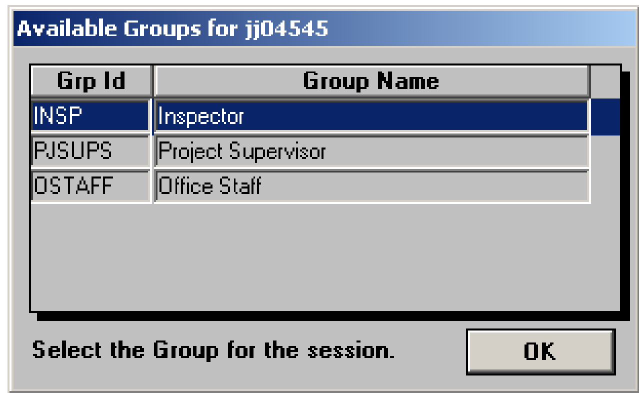


SiteManager Desktop Icon

Figure 1-2

The SiteManager Logon Dialog Box

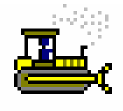
Figure 1-3



The Group Dialog Box

Figure 1-4

Note. The only RTF template that TDOT uses is The Summary to Contractor Report, which is not needed in Standalone mode; therefore, the Download RTF Template check box should never be selected.



Exercise 1-1

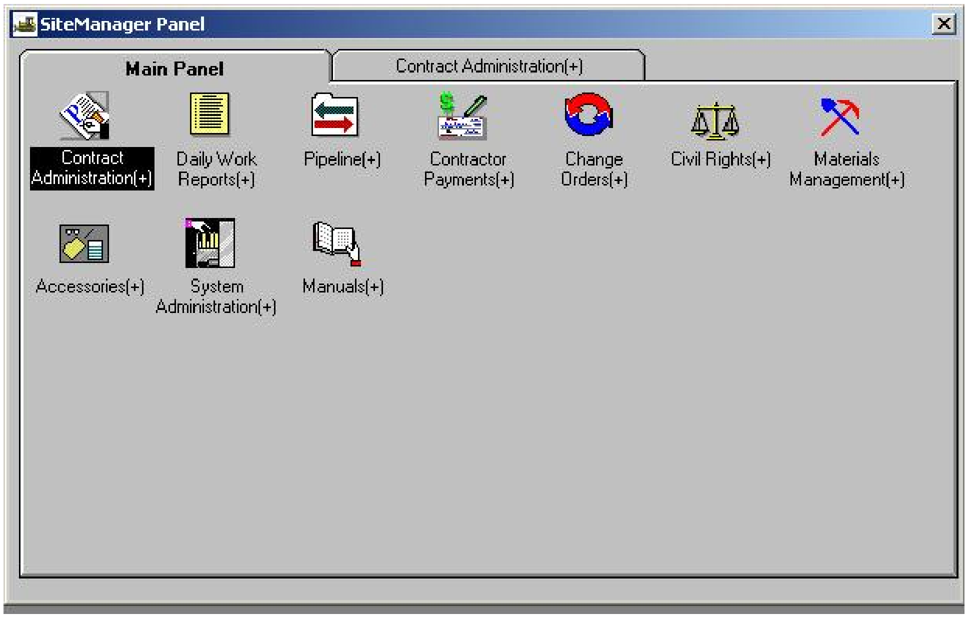
In the following exercise, you will log on to SiteManager.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022C**

1. Click the **Start** button.
2. Click the **All Programs** choice.
3. Click the **SiteManager Training** choice.
4. Click the **SiteManager** choice. SiteManager displays the SiteManager Logon dialog box.
5. In the **User ID** field, type **jj05753**.
6. Press the **Tab** key.
7. In the **Password** field, type **pass**.
8. Press **Enter**. SiteManager opens with the SiteManager Panel displayed.

Main Panel Folder Tab of SiteManager Panel

After starting the SiteManager application, the Main Panel tab will display the components of the system as icons. The central functionality of SiteManager is divided into ten icons: Contract Administration, Daily Work Reports, Pipeline, Contractor Payments, Change Orders, Civil Rights, Materials Management, Accessories, System Administration, and Manuals.



SiteManager Panel Window's Main Panel Tab

Figure 1-5

The SiteManager Status Bar

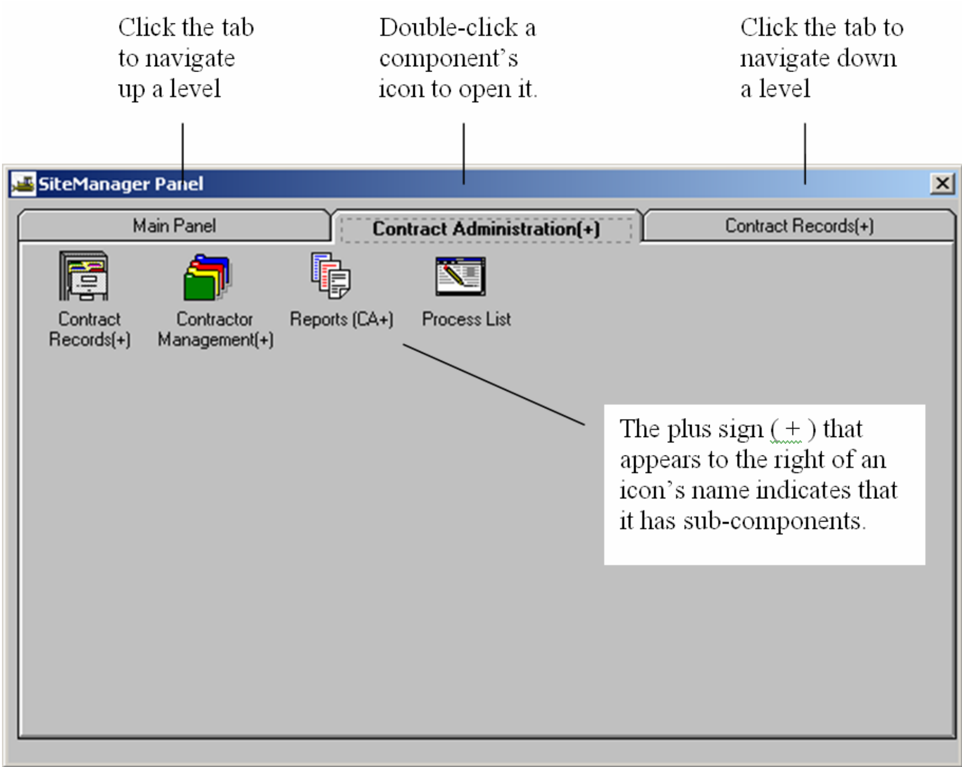
The SiteManager Status Bar at the bottom of the SiteManager window indicates your mode, connection, database region, logon group and individual ID.

Status Bar

Figure 1-6

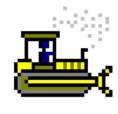
Navigating in SiteManager Using the Main Panel

The SiteManager Panel is used to navigate to the components of the SiteManager application. The highest level is the Main Panel tab that contains the different functional groups, with each group individually represented by an icon. Double-clicking the icon of a functional group brings up another folder tab consisting of the sub-groups or the actual windows contained within that functional group. As icons are selected, the next level's folder tab appears next to the previous level.



Navigating in SiteManager

Figure 1-7



Exercise 1-2

In the following exercise, you will browse some of the components of SiteManager.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022C**

1. View the icons on the Main Panel.
2. On the **Main Panel**, double-click the **Contract Administration** icon.
3. On the **Contract Administration** panel, double-click the **Contract Records** panel. SiteManager displays the Contract Records panel.
4. Take note of the icons available from the panel.

Now, let's browse another panel.

5. To go up a level, click the **Contract Administration** tab.
6. Double-click the **Contractor Management** icon. SiteManager displays the **Contractor Management** panel.
7. Take note of the icons available from the panel.

Now, let's browse another panel.

8. To go up two levels, click the **Main Panel** tab.
9. Double-click the **Daily Work Reports** icon. SiteManager displays the **Daily Work Reports** panel.
10. Take note of the icons available from the panel.

Now, let's browse another panel.

11. To go up a level, click the **Main Panel** tab.
12. Double-click the **Pipeline** icon. SiteManager displays the **Pipeline** panel.
13. Take note of the icons available from the panel.

Now, let's browse another panel.

14. To go up a level, click the **Main Panel** tab.
15. Double-click the **Contractor Payments** icon. SiteManager displays the **Contractor Payments** panel.
16. On the **Contractor Payments** panel, double-click the **Estimate** icon. SiteManager displays the **Estimate** panel.
17. Take note of the icons available from the panel.

Now, let's browse another panel.

18. To go up a level, click the **Main Panel** tab.
19. Double-click the **Change Orders** icon. SiteManager displays the **Change Orders** panel.
20. On the **Change Orders** panel, double-click the **Change Order Maintenance** panel.

21. Take note of the icons available from the panel.

Now, let’s browse another panel.

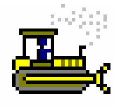
22. To go up a level, click the **Main Panel** tab.
23. Double-click the **Accessories** icon. SiteManager displays the **Accessories** panel.
24. Take note of the icons available from the panel.

Now, let’s browse another panel.

25. To go up a level, click the **Main Panel** tab.
26. Double-click the **Manuals** icon. SiteManager displays the **Manuals** panel.
27. Take note of the icons available from the panel.

Now, to prepare for the next exercise, let’s navigate to the **Contract Records** panel.

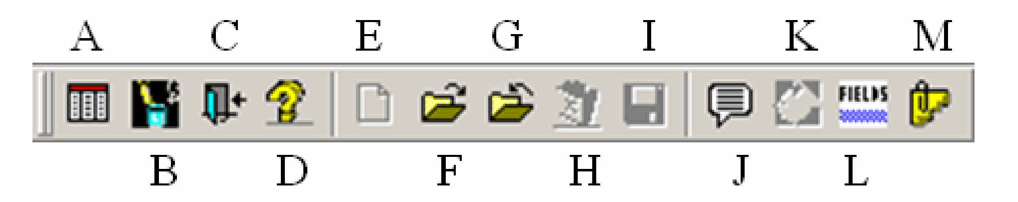
28. To go up a level, click the **Main Panel** tab.
29. Double-click the **Contract Administration** icon.
30. Double-click the **Contract Records** icon. SiteManager displays the **Contract Records** panel.
31. In the **Contract Records** panel, double-click the **Contracts** icon. SiteManager displays the **Select Contract** window.
32. In the **Contract ID** list box, scroll to and double-click **CNB022C**. SiteManager displays the **Contracts** window.



Exercise 1-3

In the following exercise, you will identify the components of the toolbar. Place the mouse over the button and use the tool tip to identify each component. Then you will activate the "show text" option. Write the toolbar component name next to the appropriate letter below.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022C**



The SiteManager Toolbar

Figure 1-8

A	____________________	H	____________________
B	____________________	I	____________________
C	____________________	J	____________________
D	____________________	K	____________________
E	____________________	L	____________________
F	____________________	M	____________________
G	____________________		____________________

1. Place the mouse pointer on the toolbar.
2. Use the right-click button to click the toolbar.
3. In the **Object** menu, click **Show Text**.

Controlling the Display of Multiple SiteManager Components

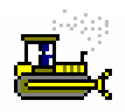
The File Menu

Figure 1-9

In many instances, you will be working in a SiteManager component and need to leave it temporarily to open another component. Having opened more than one component of SiteManager you may then need to control the display.

Opening Multiple SiteManager Components

While being in one SiteManager component, you may need to go to another component without closing the current one.



Exercise 1-4

In the following exercise, you will open one component, while another component of SiteManager is open.

User ID: **jj05753**   Group: **PJSUPS**   Contract: **CNB022C**

Now, let’s open another SiteManager component.

1. Click the **SiteManager Panel** button.
2. Double-click the **Projects** icon. SiteManager displays the Projects window.
3. In the **Project Number** list box, scroll to and double-click **55019-3220-94**.

Using the Window Menu to Control the Display of Multiple SiteManager Components

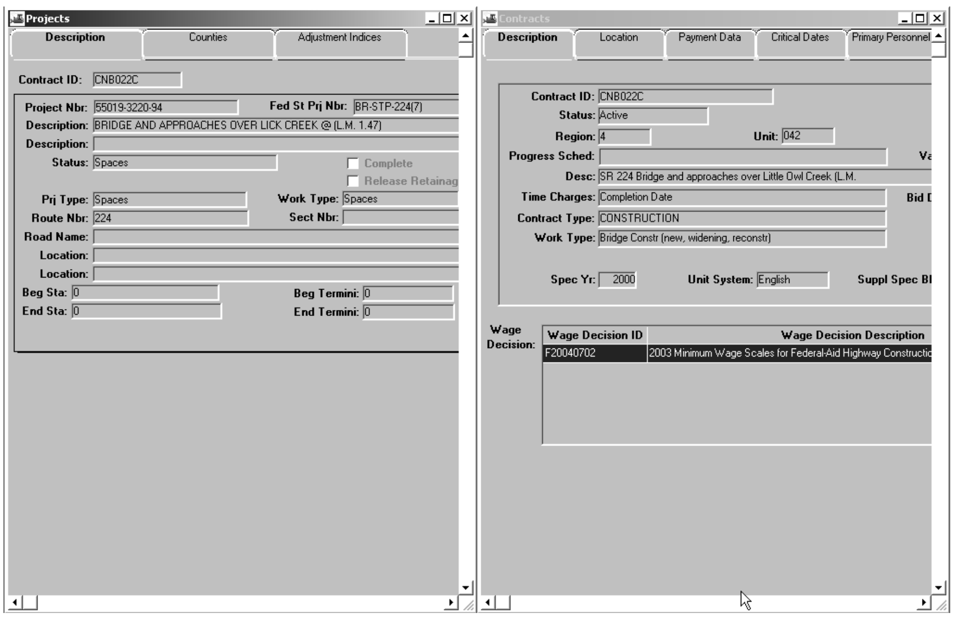
The Window Menu

Figure 1-10

Having opened more than one SiteManager component, you can now use a variety of standard Windows methods to control the display of the components and your movement between them.

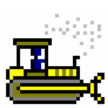
CONTROLLING THE WINDOW DISPLAY USING TILE

Tiling divides the screen into the number of SiteManager components that you have active. Typically, tiling is used to display two SiteManager components side by side horizontally to compare the entries in each or to return a single component to full screen once you have closed the other component. With three components of SiteManager active, tiling would give each component only one third of the screen. Unless you have a very large display, tiling with more than two SiteManager components open may not be very useful.



Two SiteManager Components Tiled

Figure 1-11



Exercise 1-5

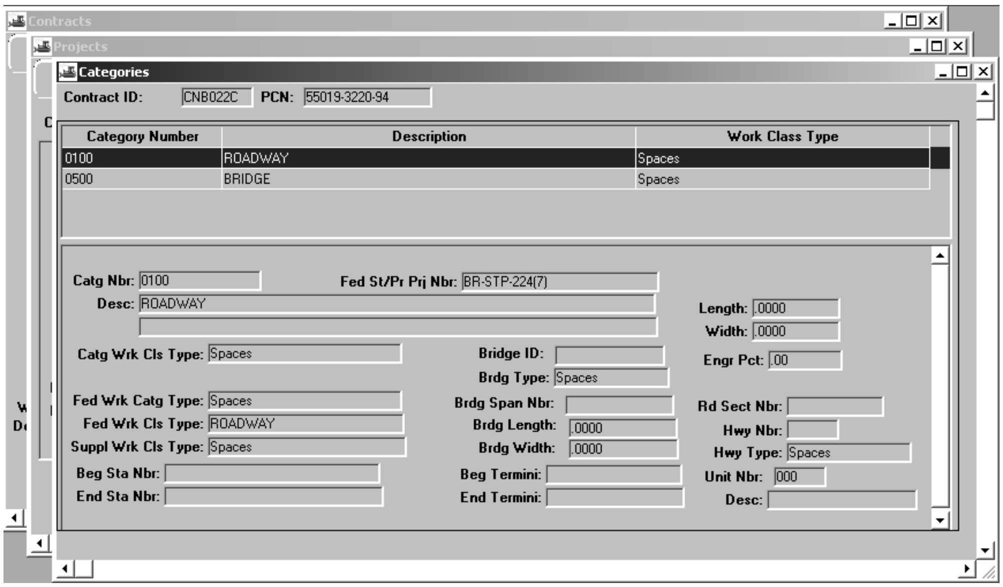
In the following exercise, you will tile the two current components of SiteManager.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022C**

1. Click the **Window** menu.
2. Click the **Tile** choice. SiteManager tiles the windows.

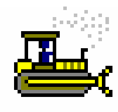
CONTROLLING WINDOW DISPLAY USING CASCADE

Cascading makes the number of SiteManager components that you have active an equal size and arrange each component in an overlapping *offset* window. Typically, cascading is used to display *more than two* open SiteManager components offset. When you have a need to navigate between more than two open SiteManager components, the Cascade choice may make it easier to move between them.



Three SiteManager Components Cascaded

Figure 1-12



Exercise 1-6

In the following exercise, you will open another SiteManager component, cascade the open components and navigate among the three.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022C**

1. Click the **SiteManager Panel** button.
2. In the **Contract Records** panel, double-click the **Categories** icon.

Now, let’s cascade the windows.

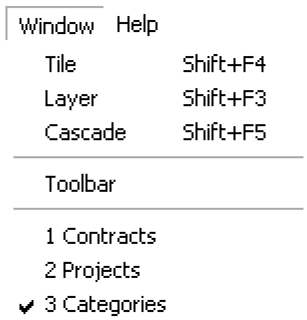
4. Click the **Window** menu.
5. Click the **Cascade** choice. SiteManager cascades the windows.

Now, let’s navigate between the cascaded windows.

6. Click the visible portion of the **Projects** window.
7. Click the visible portion of the **Contracts** window.

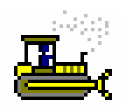
CONTROLLING WINDOW DISPLAY USING LAYER

Layering displays the SiteManager component that you have active in the most efficient *full screen* display. Typically, layering is used to give each active component a full window for display or to return a single active component to full display after you have closed the other components that were tiled or cascaded.



The Window Menu with Three SiteManager Components Active

Figure 1-13



Exercise 1-7

In the following exercise, you will layer the three open components of SiteManager and move between them.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022C**

1. Click the **Window** menu.
2. Click the **Layer** choice. SiteManager layers the windows.

Now, let’s navigate to another window.

3. Click the **Window** menu.
4. Click the **Categories** choice. SiteManager displays the Categories window.

Now, let’s navigate to another window.

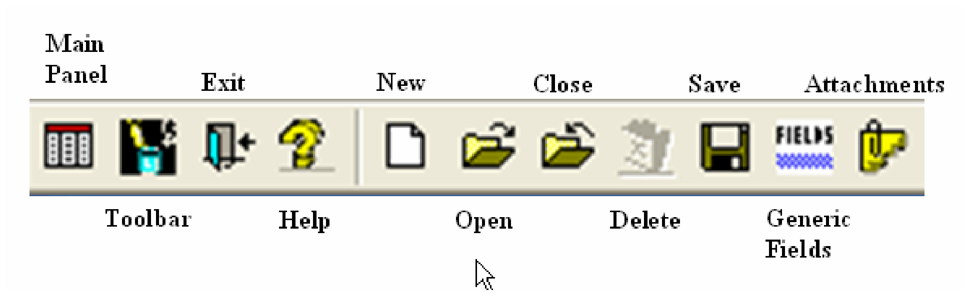
5. Click the **Window** menu.
6. Click the **Projects** choice. SiteManager displays the Project window.

Closing Versus Exiting in SiteManager

The File Menu

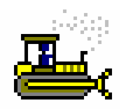
Figure 1-14

While SiteManager is not document oriented like other common Windows applications, the same principle of closing versus exiting still applies. When you are in a SiteManager component and you wish to end your work in it, but still continue to perform other SiteManager activities, you should *close*. As with other applications, you only *exit* SiteManager when you are through with your activities.



The SiteManager Toolbar

Figure 1-15



Exercise 1-8

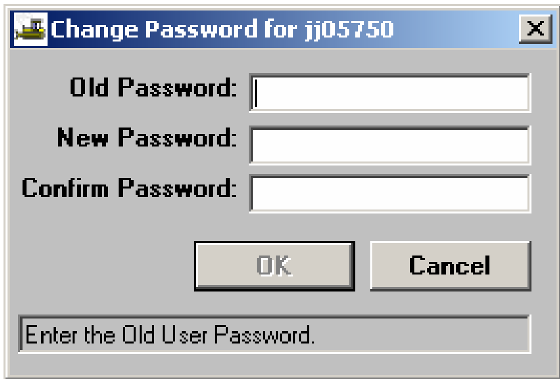
In the following exercise, you will close a component of SiteManager and then exit the application.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022C**

1. To close a window, click the **Close** button.
2. To exit SiteManager, click the **Exit SiteManager** button or click the **File** menu followed by the **Exit** choice.

Changing Your SiteManager Password

In addition to your network logon identity, SiteManager also has password protection. Your SiteManager ID determines what information you have access to and whether you can update the data or not. If you have any questions regarding your SiteManager security access, contact your SiteManager System Administrator.



The Change Password Dialog Box

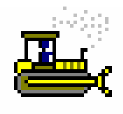
Figure 1-16

IMPORTANT TIPS REGARDING YOUR USER ID:

1. **In TDOT, when a User ID is first assigned to a User, the default password is PASSWORD (all caps). The User must change the password before logging on to SiteManager.**
2. **SiteManager User IDs for TDOT Criteria:**
    - **Seven characters in length.**
    - **The first two characters will be jj (in lowercase), followed by a randomly assigned 5-digit number.**

IMPORTANT TIPS REGARDING YOUR SITEMANAGER PASSWORD AND LOGON ATTEMPTS:

1. **It is important that you do not give out your password to anyone. SiteManager maintains a record of everything you do in SiteManager. These records are the same as your signature.**
2. **If you have attempted to log on twice and have failed, close the SiteManager Logon window and start again. This will allow you to try to log on again without disabling your password.**
3. **If you attempt to log on three times and fail, SiteManager will disable your password. Contact Regional Support if password is disabled.**
4. **SiteManager Passwords for TDOT Criteria:**
    - **Four to eight characters in length**
    - **Case-sensitive - SiteManager can tell the difference between capital and lowercase letters. Type your ID and password precisely.**
    - **90-day expiration**
    - **Cannot be the word “password”**



Exercise 1-9

In the following exercise, you will log on to SiteManager using another ID and change the password.

User ID: **jj05750** Group: **PJSUPS** Contract: **CNB022C**

1. Double-click the **SiteManager Training** program icon on your desktop.
2. To select the user ID, hold down the **Shift** key and press the **Tab** key.
3. In the **User ID** field, type **jj05750**.
4. To move to the next field, press the **Tab** key.
5. In the **Password** field, type **PASSWORD**.
6. Click the **Change Password** button. SiteManager displays the Change Password dialog box.

Now, let's change the password.

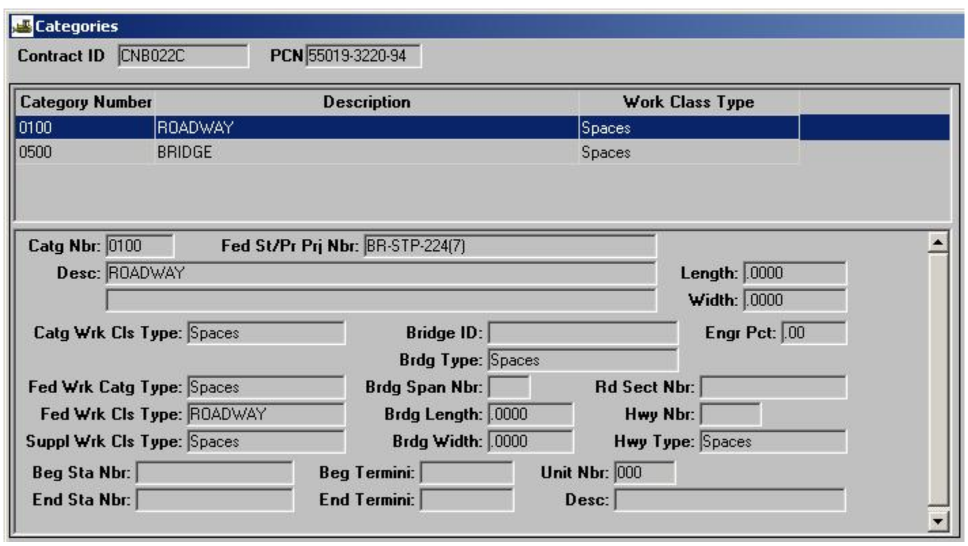
7. In the **Old Password** field, type **PASSWORD**.
8. Press the **Tab** key.
9. In the **New Password** field, type **pass**.
10. Press the **Tab** key.
11. In the **Confirm Password** field, type **pass**.
12. Click **OK**.

Security Overview

Depending on your SiteManager security privileges, you 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, or
- Access to SiteManager in both a standalone and network mode.

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



A SiteManager Window in Inquiry Only Mode

Figure 1-17

Exercise 1-10

In the following exercise, you will access an inquiry only window in server mode as well as log into the application in standalone mode to view the difference in security options.

User ID: **jj05750** Group: **PJSUPS** Contract: **CNB022C**

1. How many icons are displayed on the Main Panel? ________________
2. Double-click the **Contract Administration** icon.
3. Double-click the **Contract Records** icon.
4. How many icons are displayed on the Contract Records panel?
   ____
5. Double-click the **Categories** icon.
6. Double-click Contract **CNB022C**.
7. Double-click Project Number **55019-3220-94**.
8. Does the screen display in inquiry or update mode?________________
9. Click the **Exit SiteManager** button.

Now, let's log on using a different user ID and see how the access rights for that user affect the icons available.

User ID: **jj05753** Group: **PJSUPS** Mode: **Standalone**

10. Double-click the **SiteManager Training** program icon.
11. To select the User ID, hold down the **Shift** key and press the **Tab** key.
12. In the **User ID** field, type **jj05753**.
13. In the **Connect to** drop-down list, click the expand arrow to the right of the current selection and click the **Training Standalone** choice.
14. In the **Password** field, type **pass**.
15. Click the **Logon** button.
16. How many icons are on the Main Panel? _________________________
17. On the **Main Panel,** double-click **Contract Administration**.
18. On the **Contract Administration** panel, double-click the **Contract Records** icon.
19. How many icons are displayed on the Contract Records panel? _______
20. Click the **File** menu.
21. Click the **Exit** choice.

Now, to prepare for the next exercise, let's log on using a different user ID.

User ID: **jj05754** Group: **OSTAFF** Mode: **Server**

22. Double-click the **SiteManager Training** program icon.
23. Hold down the **Shift** key and press the **Tab** key.
24. In the **User ID** field, type **jj05754**.
25. Press the **Tab** key.
26. In the **Password** field, type **pass**.
27. Press **Enter**.

Entering a SiteManager Window – Open, New, and Choose Keys

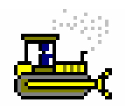
When you have the authority and update rights and first enter a SiteManager window, you can:

- Open for an existing record , or
- Create a new record for data entry,
- Choose keys to create a new record.

In some instances, SiteManager will not even let you into the window without choosing the keys first. Choosing the keys identifies the initial values for the new or existing record.

Opening an Existing Record

When opening an existing record, it is not necessary to use the Choose Keys option. For some windows, a selection list will be automatically displayed to allow the User to select the appropriate record. For other windows, the User may access records by selecting the Open button and choosing the appropriate record.



Exercise 1-11

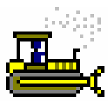
In the following exercise, you will access a window and open an existing record that needs multiple keys.

User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022H**

1. On the **Main Panel** tab, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** tab, double-click the **Daily Work Reports** icon.
3. What security mode are we in (inquiry or update)? _______________
4. What Contract ID is displayed? ______________________________
5. On the toolbar, click the **Open** button.
6. In the **Contract** list box, scroll to and double-click contract ID **CNB022H**.
7. In the **Inspector** list box, scroll to and double-click user ID **jj05751**.
8. In the **Date** list box, scroll to and double-click DWR date **04/20/05**.
9. When informed that the DWR will be opened in read-only format, click the **OK** button.
10. When you want to open an existing record, do you use Open, New, or Choose Keys? ____

Creating a New Record

When creating a new record, the User will navigate to the appropriate window. For some windows, the window will open in New mode. For other windows, the User may create a new record by selecting the New button.



Exercise 1-12

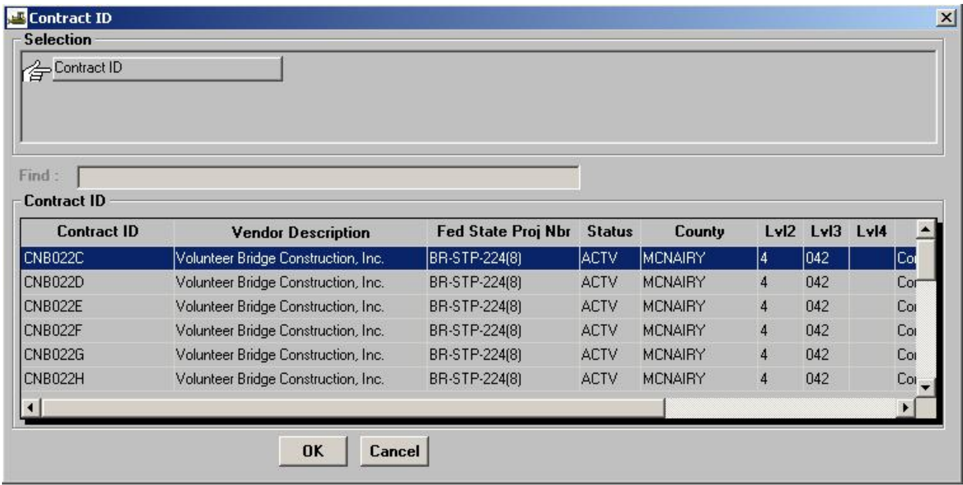
In the following exercise, you will access a window and identify the new record mode.

User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022H**

1. On the toolbar, click the **New** button.
2. Note that you are ready to create a record for Contract CNB022H.
3. What is the Inspector's Name? ____________________________
4. What is the DWR date? __________________________________
5. What is the Contract? ___________________________________
6. When you want to create a new record, do you use Open, New, or Choose Keys? ____

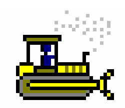
Choosing Keys

The Choose Keys choice displays a list of key field(s) to be selected. In many instances in SiteManager, the Choose Keys choice must be selected before a new record can be created.



Choosing Keys

Figure 1-18



Exercise 1-13

In the following exercise, you will access a window that requires keys to be chosen and identify the new record mode.

User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022C**

1. Click the **Services** menu.
2. Click the **Choose Keys** choice. SiteManager displays the Contract ID window.
3. In the **Contract ID** list box, scroll to and click the **CNB022C** choice.
4. Click the **OK** button.
5. Note that you are ready to create a record for Contract **CNB022C**.
6. When you want to create a new record for a DIFFERENT Contract, do you use Open, New, or Choose Keys? ______________________
7. Click the **Close** button.
8. Click the **No** button when prompted to save changes.
9. Click the **Main Panel** folder tab.

Using the Object Menu for Data Manipulation and Retrieval

To make data entry and retrieval easier, SiteManager provides a Search, Filter, Find, and Sort capability throughout the application. The Filter and Find functions also provide Users with the ability to limit the data retrieved from the SiteManager database by specifying criteria using relational operators. The Clear button removes the current data retrieval choice in effect. The Show Filter/Sort choice shows the current criteria in effect for these choices.

To invoke the Object menu, using the right mouse button, click in a field.

The Object Menu

Figure 1-19

Criteria Window Buttons:

Insert: Inserts a blank row before the currently selected row.

Add: Inserts a blank row after the last row.

Remove: Deletes the selected row. Remove deletes only one row at a time.

Clear: Deletes all rows. All rows must be deleted to return to the complete, unfiltered list.

Load: Opens saved filter list. Saved filter 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.

Criteria Window Conditions:

Using the Equal (=) condition:

- Requires the specified value to be exact.
- Only matching whole words will be included
- Only matching capitalization will be included

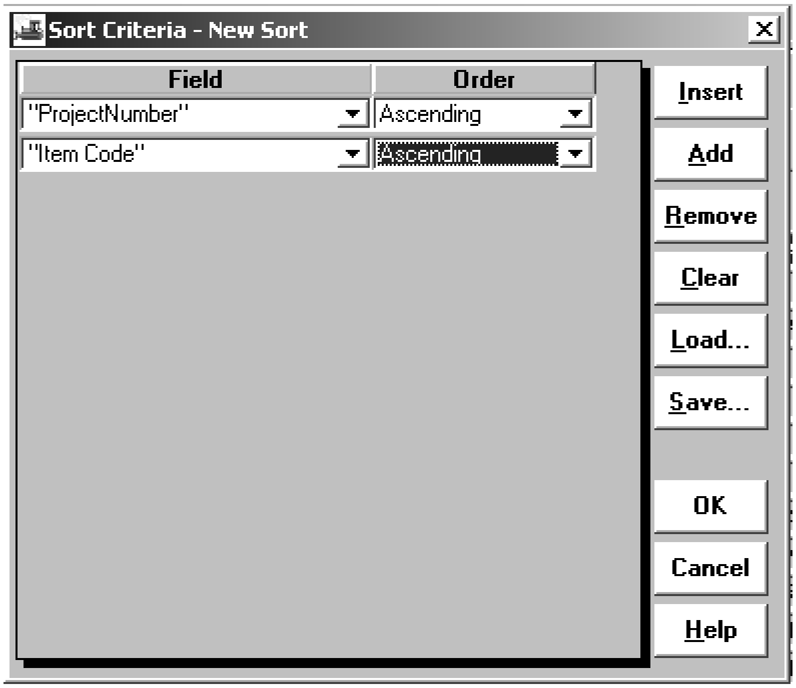
Using the Like condition:

- Allows specified value to be imprecise
- Wildcard % allowed – A wildcard is a value that matches any value – like the wild card when playing Uno.
- SiteManager assumes value% when the Like condition is selected, including all data that start with the entered value
- %value% allows partial data matches to be included
- Only matching capitalization will be included

When creating multiple conditions, AND joins will be executed before OR joins.

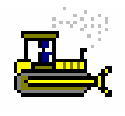
Sorting

When the window displays as a list, the Sort feature allows you to sort the list, based on specified criteria. Each time the window displays, the default sort criterion is automatically applied. As with the Filter function, only one default sort criterion can be in effect for a window at any given time.



The Sort Window

Figure 1-20



Exercise 1-14

In the following exercise, you will sort the Work Items records for a DWR for Contract CNB022E.

User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022E**

1. In the **Main Panel**, double-click the **Daily Work Reports** icon.
2. In the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
3. In the **Daily Work Reports** window, click the **Open** button on the toolbar.
4. Click the **No** button in the Save Message.
5. In the **Contract ID** list box, scroll to and double-click **CNB022E**.
6. In the **Inspector ID** list box, scroll to and double-click **jj05752**, Sandy Gutierrez.
7. In the **DWR Date** list box, scroll to and double-click **04/04/05.**
8. Click the **OK** button to the Read Only message.
9. Click the **Work Items** folder tab.

Now, let's use the column headings to sort the Work Item list.

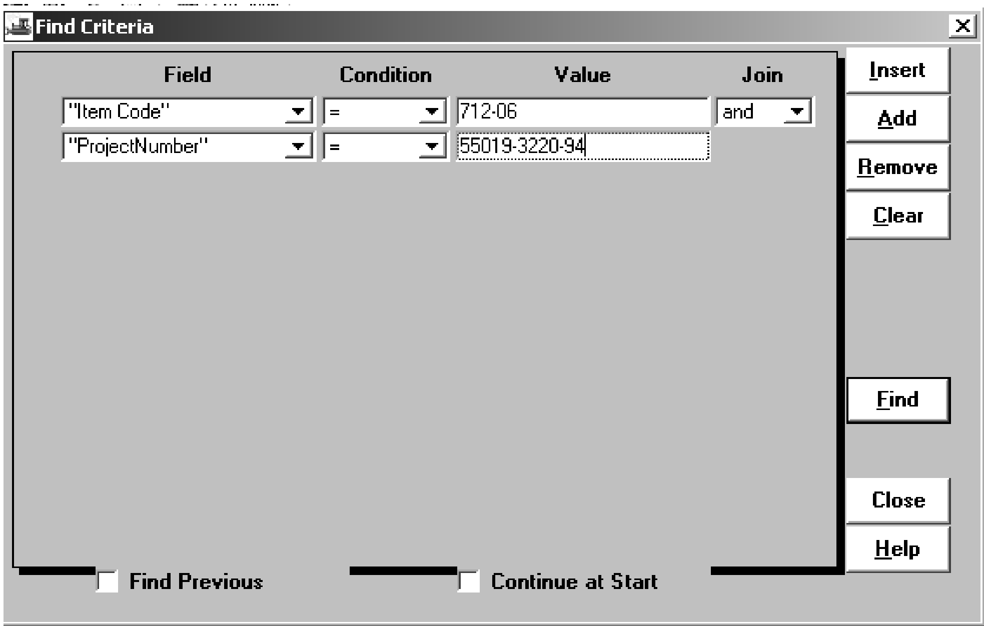
10. Click the **Description** column heading.
11. Click the **Item Code** column heading.
12. Click the **Instld** column heading.
13. Scroll to the bottom of the list to see the items that were reported installed on this DWR.

Now, let's use the Object Menu to sort.

14. Position the pointer over the first record.
15. Use the right-click button click the record.
16. In the **Object** menu, click **Sort**.
17. In the **Sort Criteria** window, click the **Add** button.
18. In the **Field** drop-down list, click **ProjectNumber**
19. Click the **Add** button, again.
20. In the **Field** drop-down list, click **Item Code**.
21. Click the **OK** button.

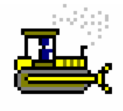
Finding

When a window displays as a scrollable list, the Find choice allows the User to get to a specific row by selecting the appropriate value to find.



The Find Criteria Window

Figure 1-21



Exercise 1-15

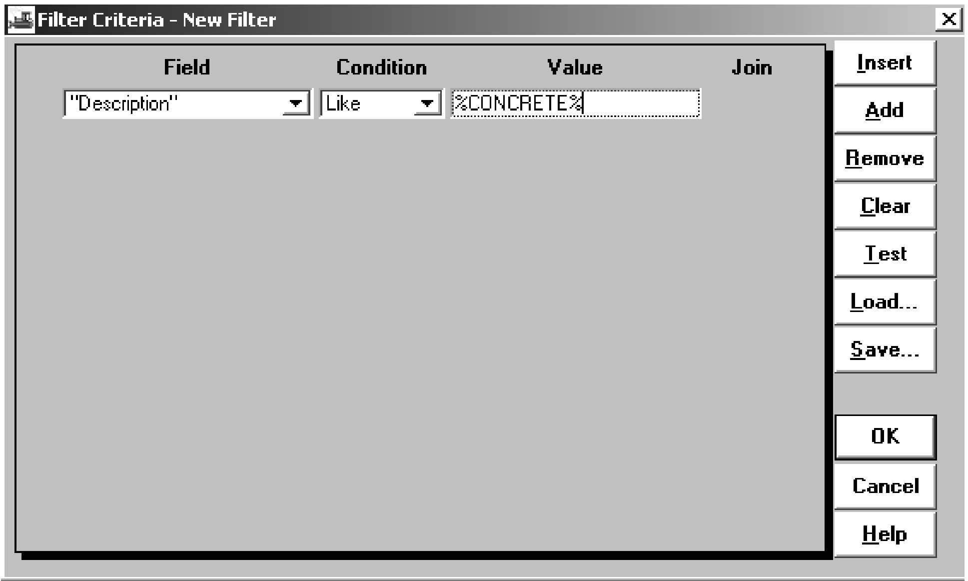
In the following exercise, you will locate an item using the Find option.

User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022E**

1. Position the selection pointer over the first record in the list at the top of the window.
2. Using the *right* mouse button, click the record.
3. From the object menu, click the **Find** choice. SiteManager displays the Find Criteria window.
4. On the **Find Criteria** window, click the **Add** button.
5. In the **Field** drop-down list, click **Item Code**.
6. In the **Condition** drop-down list, click **=.**
7. In the **Value** field, type **712-06**.
8. Click the **Add** button.
9. In the **Field** drop-down list, click **ProjectNumber**.
10. In the **Condition** drop-down list, click **=**.
11. In the **Value** field, type **55019-3220-94**.
12. Click the **Find** button.

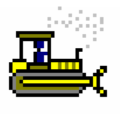
Filtering

The Filter choice allows you to specify filtering criteria for SiteManager fields and their limiting values using relational operators. Each time a window displays, the filtering criteria, marked as default, is automatically applied, thereby limiting the amount of data retrieved. Only one default filter criterion can be in effect for a window at any given time.



The Filter Criteria Window

Figure 1-22



Exercise 1-16

In the following exercise, you will learn how to filter to display only the records meeting your condition.

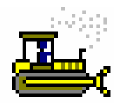
User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022E**

Now, let's filter the contents of this list.

1. Position the selection pointer over a record in the list at the top of the window.
2. Using the *right* mouse button, click the record.
3. From the object menu, click the **Filter** choice. SiteManager displays the **Filter Criteria** window.
4. Click **No** to the Save Changes prompt.
5. In the **Filter Criteria** window, click the **Add** button.
6. In the **Field** drop-down list, click **Description.**
7. In the **Condition** drop-down list, click **Like.**
8. In the **Value** field, type **%CONCRETE%.**
9. Click the **OK** button.
10. When informed that the specified filter will return a number of rows, click the **Ok** button. The Work Items window displays the filtered results.

Clearing the Current Criteria

Remember that the current data retrieval choice will stay in effect until cleared. The Clear button removes the current data retrieval choice in effect by deleting all of the rows of criteria, which returns unfiltered results.



Exercise 1-17

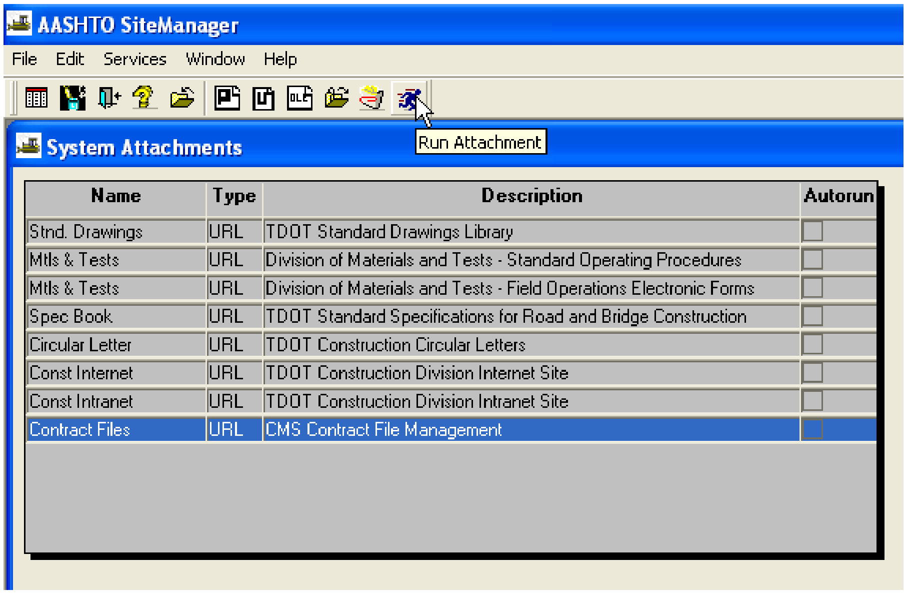
In the following exercise, you will clear the current filter.

User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022E**

1. Position the selection pointer over a record.
2. Using the *right* mouse button, click the record.
3. From the object menu, click the **Filter** choice. SiteManager displays the Filter Criteria window.
4. In the **Filter Criteria** window, click the **Clear** button.
5. Click the **OK** button. SiteManager displays a message.
6. When informed that the specified filter will return a number of rows, click the **OK** button. The Work Items window displays all of the rows without filtering the results.
7. Click **Yes** to the **Filter Message**.
8. Click the **Close** button on the toolbar.
9. Click the **Main Panel** folder tab.

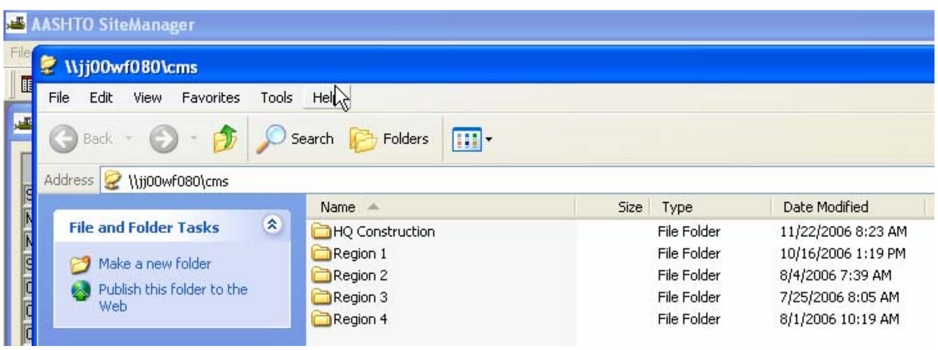
System Attachments

The System Attachments window allows URL links, Plug-In applications, and OLE attachments to be attached the SiteManager system without being attached to specific records. Plug in and OLE attachments are detailed in other sections of this training manual.



The System Attachments Window

Figure 1-23



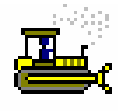
The CMS File Management System Attachment

Figure 1-24

In TDOT, 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 as follows.

\\jj00wf080\cms\



Exercise 1-18

In the following exercise, you will view System Attachments.

User ID: **jj05754** Group: **OSTAFF**

1. On the **Main Panel,** double-click the **Accessories** icon.
2. Double-click the **System Attachments** icon.
3. In the System Attachments list box, scroll to and click **CMS Contract File Management**.

The System Attachments are not set up for the training environment.

4. Click the **Close** button.
5. Click the **Main Panel** folder tab.

Support Resources

The following Support Resources have been developed for AASHTO SiteManager. Contact your SiteManager System Administrator to verify your Transportation agency policies regarding the availability and distribution of this material.

- User Manual (.pdf)
- SiteManager On-line Help
- Learning Guides
- Training Database

<u>TDOT SiteManager Support Personnel</u>

Location	Name	Email	Phone
Region 1	Bobby Henegar	Bobby.Henegar@state.tn.us	(865) 594-4511
	Jane Peterson	Jane.Peterson@state.tn.us	(865) 594-2351
Region 2	Gail Hollis	Gail.Hollis@state.tn.us	(423) 949-9202
Region 3	Gwen Ward	Gwen.Ward@state.tn.us	(931) 684-0797
Region 4	Dan Robinson	Dan.Robinson@state.tn.us	(731) 935-0220
	Chrystal Cochran	Chrystal.Cochran@state.tn.us	(731) 935-0221
HQ	Chris Hampton	Chris.Hampton@state.tn.us	(615) 741-3542

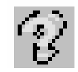
In TDOT, electronic documentation and on-line training material can be obtained from Support Personnel as needed or downloaded from \\jj00wf080\CMS\HQ\Construction\SiteManager Reference Guides.

Using Help

The Help menu will contain standard Help choices — Contents, Search for Help on, and Glossary and, when accessed while a window is open, will also provide one non-standard choice, Current Window. Help in SiteManager will work like any other Windows Help.

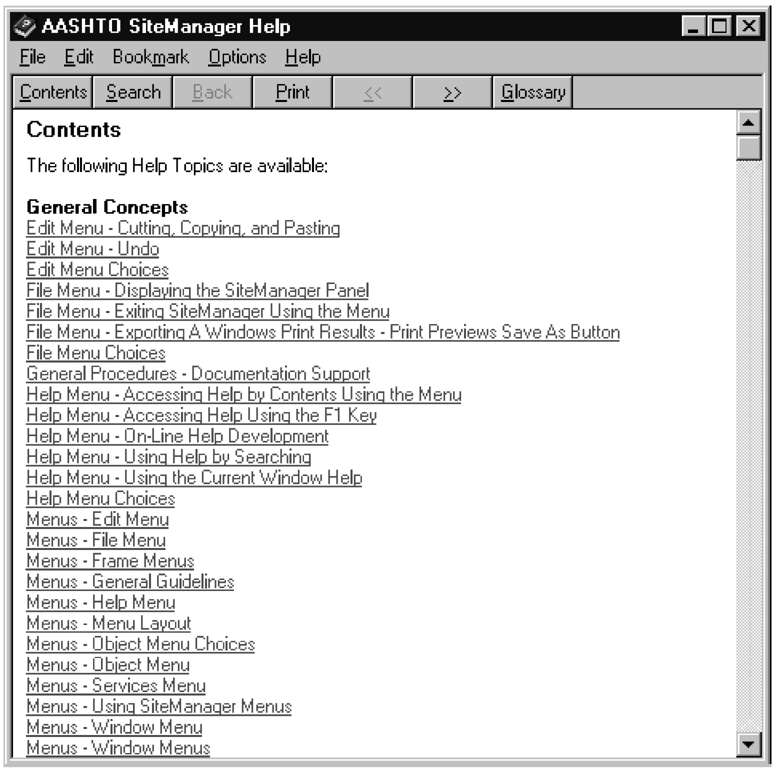
Using Help by Contents

The Help menu's Contents choice or the Help button displays an alphabetized list of Help Topics that can be browsed for the subject on which you need help.



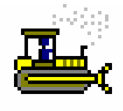
Help Button

Figure 1-26



Help Contents

Figure 1-25



Exercise 1-19

In the following exercise, you will access Help from the Help menu.

User ID: **jj05754** Group: **OSTAFF**

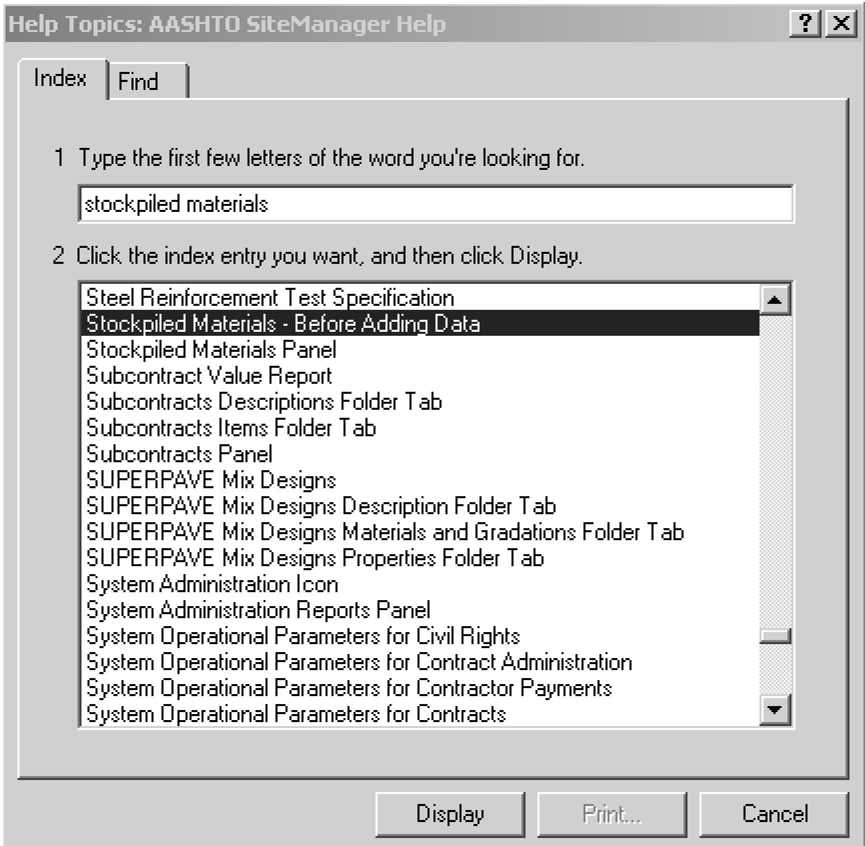
1. On the **Main Panel**, click the **Help** menu.
2. Click the **Contents** choice. SiteManager displays the AASHTO SiteManager Help window.
3. On the **Contents** page, scroll to the **Contracts Panel** section and click the **Contracts Description Folder Tab** topic.
4. Click the **Status-Contract Description** tab link. Help displays a pop-up window.

Now, let’s exit online Help.

5. To close the **Help** window, click the **File** menu and click the **Exit** choice.

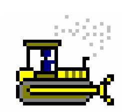
Using Help by Searching

The **Search for Help on** choice displays a lengthy, alphabetized list of Help Topics that can be browsed or searched for the subject on which you need help.



The Help Search

Figure 1-27



Exercise 1-20

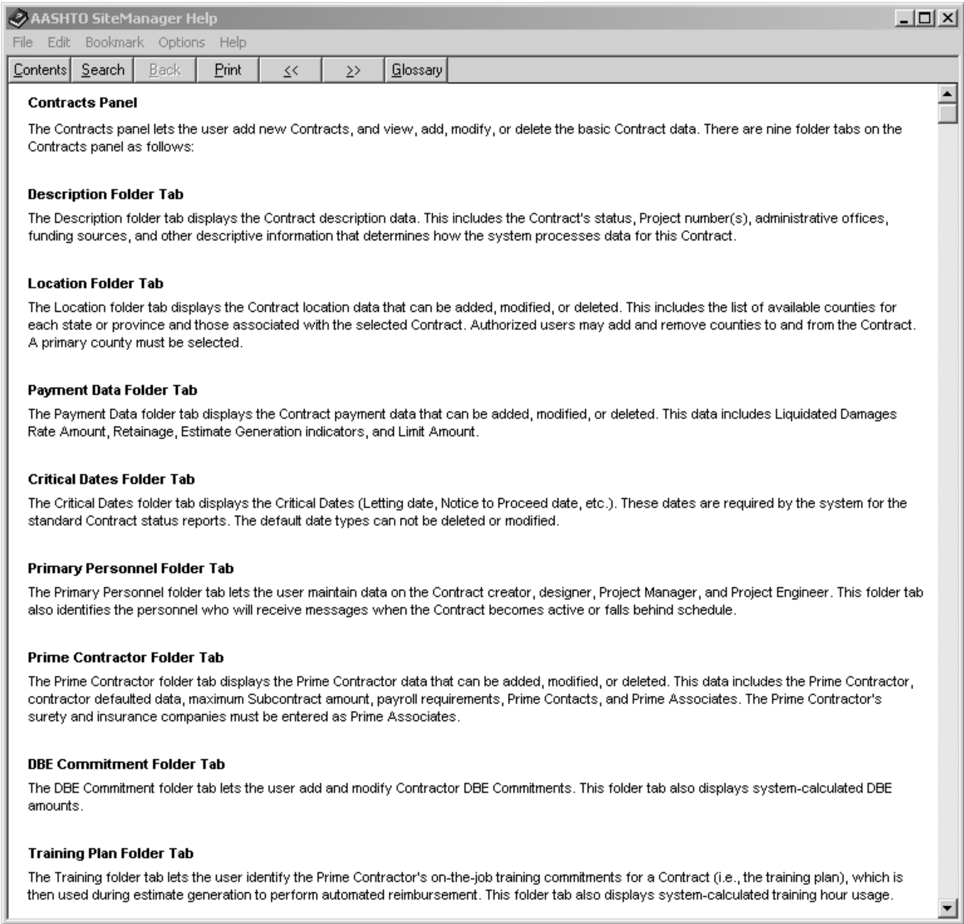
In the following exercise, you will search for a topic.

User ID: **jj05754** Group: **OSTAFF**

1. Click the **Help** menu and click the **Search for Help on** choice.
2. Click the **Search** button.
3. Type **stockpiled materials**.
4. Click the **Stockpiled Materials Panel** topic.
5. Click the **Display** button. Help displays the requested topic.
6. To close the help window, click the **File** menu and click the **Exit** choice.

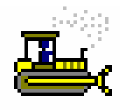
Using the Current Window Help

With any SiteManager window active, the Help menu's Current Window choice will access context sensitive help that includes Help on fields.



The Help on a SiteManager Window

Figure 1-28



Exercise 1-21

In the following exercise, you will access Help on the current window.

User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022C**

1. On the **Main 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 **Contracts** icon.

Now, let's open another contract.

4. Click the **Open** button.
5. In the **Contracts** list box, scroll to and double-click Contract **CNB022C**.
6. Click the **Help** menu and click the **Current Window** choice
7. Click the **Next Page** (>>) button (right arrow at the bottom center of window).
8. In the **Contract Description tab Field Names and Descriptions** section, click **Contract ID – Contract Description tab**. Help displays a pop-up window.

Now, let's exit online Help.

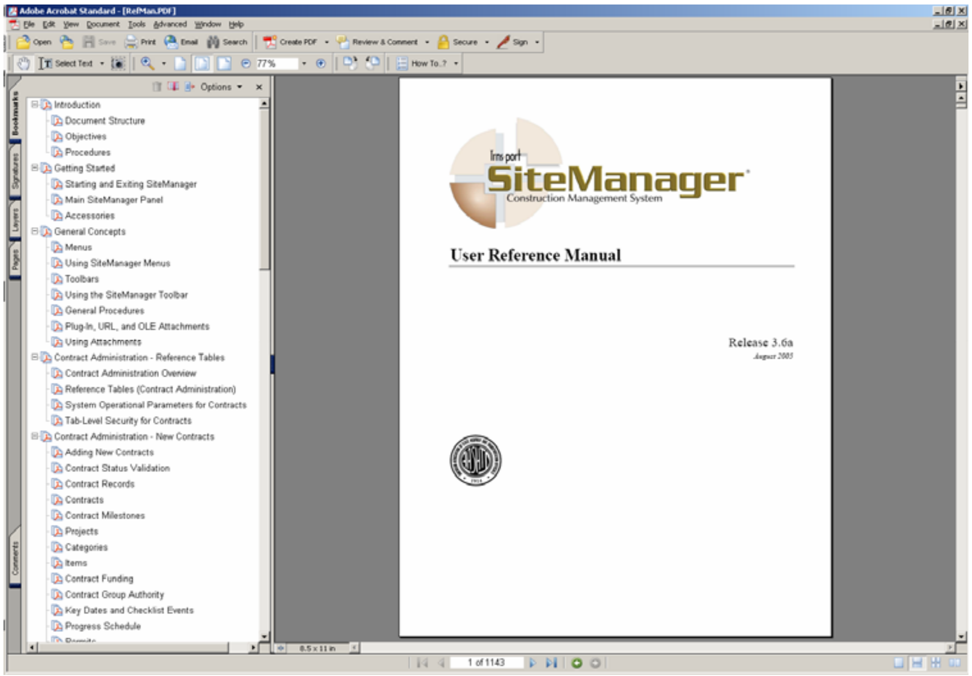
9. Click the **File** menu and click the **Exit** choice.

Now, let's prepare for the next exercise.

10. To close the **Contracts** window, click the **Close** button.
11. Click the **Main Panel** folder tab.

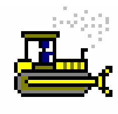
Viewing the User Manual

The SiteManager User Reference Manual is a reference document for users of the AASHTO SiteManager application. The user should refer to this manual only when a question cannot be answered by referring to the SiteManager online help system. This manual describes all of the SiteManager components, including their purpose, functions, and how to use them.



The User Reference Manual in PDF

Figure 1-29



Exercise 1-22

In the following exercise, you will access the on-line User Reference Manual.

User ID: **jj05754**   Group: **OSTAFF**

1. On the **Main Panel**, double-click the **Manuals** icon.
2. Double-click the **User Manual** icon.
3. Click the **Next Page** button. (At the bottom, this looks like a triangle.)
4. Click the page number field at the bottom of the screen.
5. Type **25**.
6. Press **Enter**.

Now, let's search the reference manual.

7. Click the **Search** button. (In the toolbar, this looks like binoculars.)
8. In the **Search for** field, type **Temperature**.
9. Click the **Search** button.
10. Click the first result.
11. Click additional results to browse the topic.

Now, let's exit the application.

12. Click the **File** menu.
13. Click the **Exit** choice.

Now, let's prepare for the next exercise.

14. Click the **Main Panel** folder tab.

Standard SiteManager Reports

Below is a list of the standard SiteManager Reports and the SiteManager panels they may be selected from.

Contract Administration:

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

Contractor Payments:

- Summary To Contractor ✍
- Installed Work
- Work Suspend/Resume Times

Change Orders:

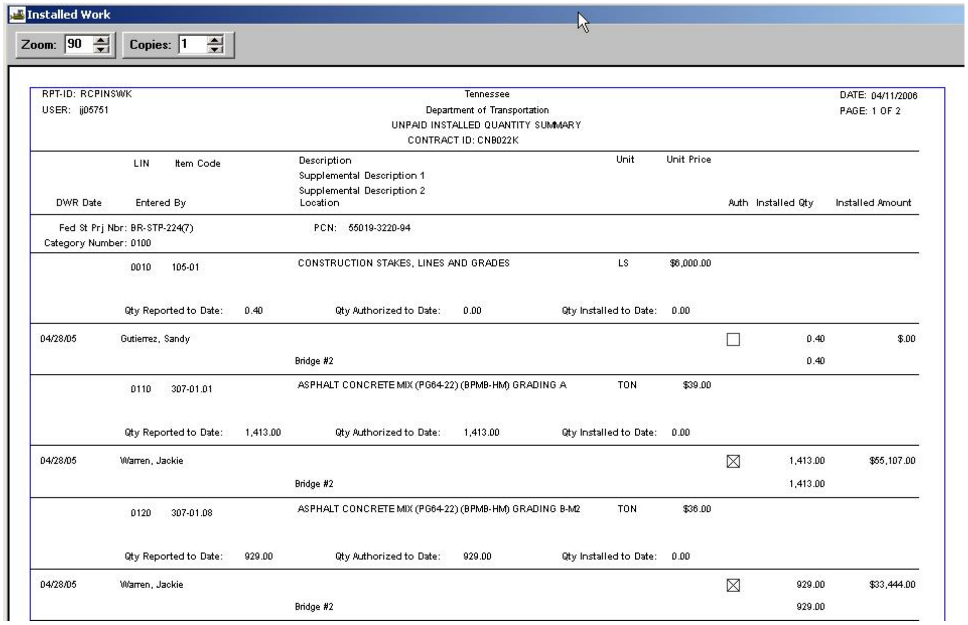
- Change Order Report
- Unapproved Change Order Aging Report
- Time Extension Granted
- Change Order/Reason Code Breakdown

TDOT has created several custom reports in Crystal Reports. The custom reports are run from a separate application accessed through the internet.

✍ This is run from the Process List window.

General Reporting Concepts

Most reports follow these procedures. The user initiates the report from the correct report window.



The Installed Work Report

Figure 1-30

To view and print a displayed report:

1. To view, click the **Next Page** or **Prior Page** icons.
2. Click the **Zoom** button to reduce the Zoom.
3. To print, click the **Copies** button, setting the desired number of copies to print.
4. Click the **File** menu and click the **Print** choice.

To Export a report:

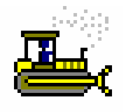
1. Run the report (saved reports may not be exported)
2. Click the **Services** menu **Export** choice.
3. In the **File Name** field, type the file name.
4. In the **Save as type** drop-down list, select the type of file: **Text**, **Exce**l, or **Lotus 1-2-3**.
5. Click the **Save** button.

A Report can be saved for later retrieval. SiteManager saves the report using a .PSR extension. To save a report:

1. On the toolbar, click the **Save** button.
2. In the **File Name** field, type the name for the file.
3. Change the drive and directory as desired.
4. Click the **Save** button.
5. In the message box, click the **OK** button.

The View Saved Reports icon can be used to open a saved report. To open a saved report:

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



Exercise 1-23

In the following exercise, you will access a standard report and save a copy of the report.

User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022K**

1. On the **Main Panel**, double-click the **Contractor Payments** icon.
2. On the **Contractor Payments** panel, double-click the **Reports** icon.
3. On the **Reports** panel, double-click the **Installed Work** icon. SiteManager displays the Report Criteria window.
4. In the list box, scroll to and double-click the **CNB022K** choice.
5. Review the Report.

Now, let’s save the report to your computer.

6. Click the **Save** button.
7. In the C**:\SMTRAINS** directory, double-click the **SMFILES** folder.
8. Type **INWK_CNB022K20061025**.
9. Click the **Save** button. SiteManager displays a dialog box to inform you about exporting the file.
10. In the dialog box, click the **OK** button.
11. To close the **Installed Work** window, click the **Close** button.

Now, let’s view the report you saved to your computer.

12. On the **Reports** panel, double-click the **View Saved Reports (PSR)** icon.
13. Double-click the **INWK_CNB022K20061025.PSR** file. SiteManager displays the View Saved Reports (PSR) window.

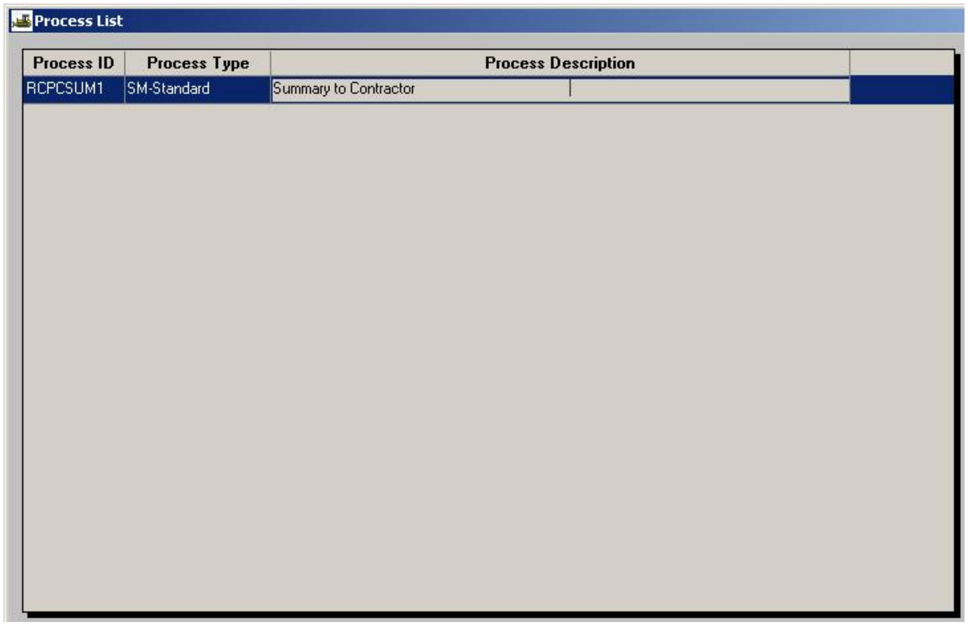
Now, let’s prepare for the next exercise.

14. Click the **Close** button.
15. Click the **Contractor Payments** tab.

Running a Process

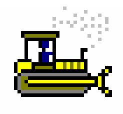
The Process List window in the Contractor Payments panel includes the Summary to Contractor Report. This is the only SiteManager Process that TDOT users will need to run.

A process is run from the Process List window by clicking on the named process, and choosing Run Process from the Services menu, or by clicking the named process and clicking the Run Process button or by double-clicking the process.



The Contractor Payments Process List window

Figure 1-31



Exercise 1-24

In the following exercise, you will run a process.

User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022P**

1. On the **Contractor Payments** panel, double-click the **Process List** icon.
2. In the **Process List**, double-click the **Summary to Contractor** report. SiteManager displays the Confirm Process Submission window.
3. Click the **Parameters** button. SiteManager displays the Process Submission Parameters window.
4. On the Process Submission Parameters window, click the **Generate Online** check box (ON). A warning will appear, noting that the latest RTF objects were not downloaded from the Object Store.
5. On the warning message, click **OK**.
6. On the **Process Submission Parameters** window, click **OK**. SiteManager closes the window.

STOP. *Do not submit the process in SiteManager Training.*

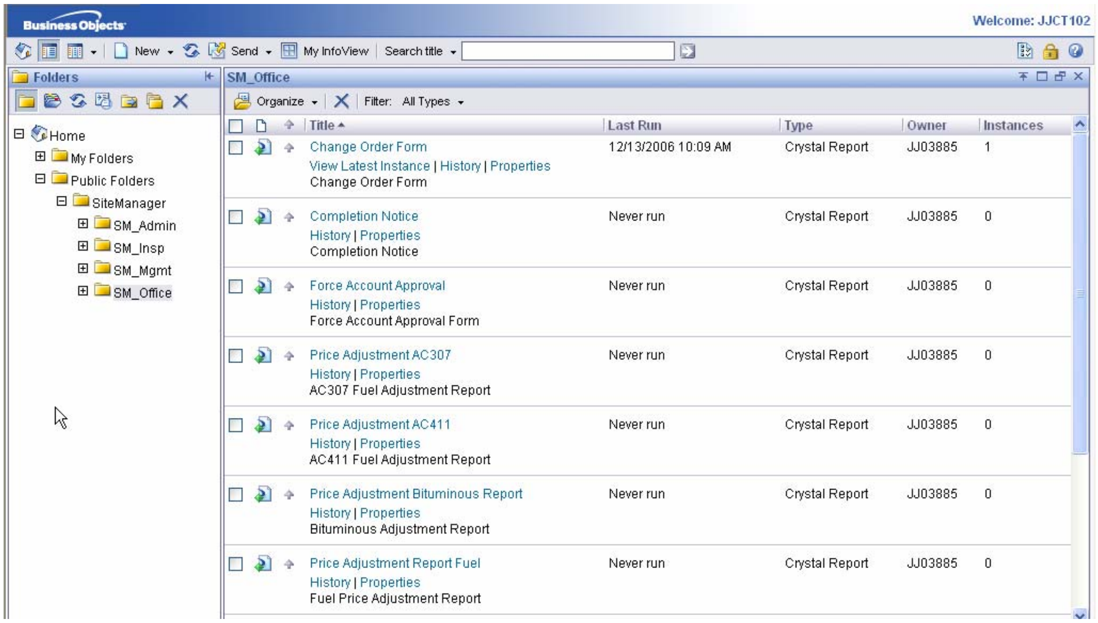
7. Click the **Cancel** Button
8. Click the **Close** Button.

A copy of the report is saved at C:\SMTRAINS\SMFILES to view during training.

9. Right-click the **Start** button at the bottom left of the screen.
10. Click the **Explore** choice.
11. Navigate to the **C:\SMTRAINS\SMFILES** folder.
12. Double-click **Estimate Summary to Contractor CNB022P.htm.**
13. After viewing report, click the **Close** button to close the browser window.
14. Click the **Exit** button to exit SiteManager.

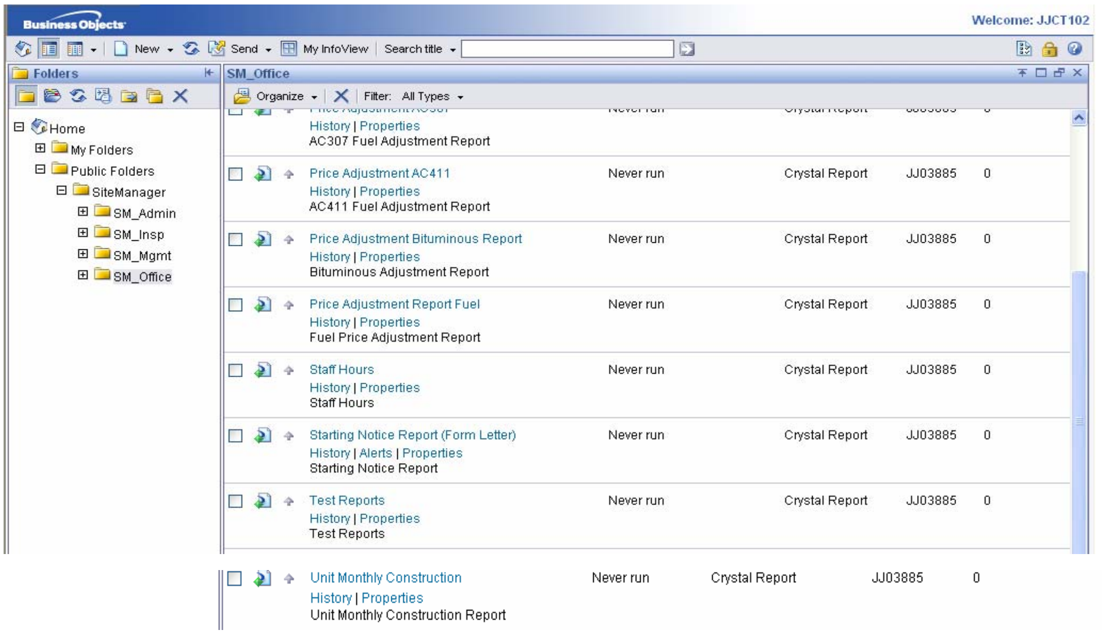
Accessing TDOT Custom Reports

When accessing the TDOT Custom reports, Office Staff users may pick from the available reports.



TDOT Office Staff available reports window - page 1

Figure 1-32



TDOT Office Staff available reports window - page 2

Figure 1-33

TDOT Custom Reports are accessed through the following web address:
http://jj00wa272/businessobjects/Enterprise115/InfoView/main.aspx

Review for Section 1

To start SiteManager:

1. Double-click the SiteManager desktop icon.

Or

1. Click the **Start** button, click the **Program** choice, click the **SiteManager** choice, and click the **SiteManager** choice.
2. Type your logon identification name.
3. Press the **Tab** key.
4. Type your password.
5. If appropriate in the **Connect to** drop-down list, click the expand arrow to the right of the current selection and click the desired database choice.
6. Press **Enter**.
7. If appropriate, in the **Available Group for …** dialog box, click the group ID.

To select a main panel component of SiteManager:

1. Double-click the component's icon

To select up or down a level in SiteManager:

1. Click the level's folder tab.

To open more than one component of SiteManager:

1. Open the first component of SiteManager.
2. Click the **SiteManager Panel** button.
   Or
   Click the **File** menu and click the **Main Panel** choice.
3. Open the other component of SiteManager.

To tile:

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

To cascade:

1. Open the number of SiteManager components that you want to cascade.
2. Click the **Window** menu and click the **Cascade** choice.
3. Click the visible portion of the window you want to display.

To layer:

1. Open the number of SiteManager components that you want to layer.
2. Click the **Window** menu and click the **Layer** choice.

To move between multiple layered SiteManager components:

1. Click the **Window** menu.
2. Click the name of the SiteManager component from the list.

To close a SiteManager component:

1. Click the **Close** button.

Or

1. Click the **File** menu and click the **Close** choice.

To exit SiteManager:

1. Click the **Exit** button.

Or

1. Click the **File** menu and click the **Exit** choice.

To change your password:

1. Start SiteManager.
2. On the logon screen, type your existing password.
3. Click the **Change Password** button.
4. Type your old password.
5. Press the **Tab** key.
6. Type your new password.
7. Press the **Tab** key.
8. Type your new password, again.
9. Click **OK**.

To open an existing record:

1. Double-click the window’s icon.
2. Click the **Open** button.
3. Scroll to and click the desired record.
4. Click **OK**

To create a new record:

1. Double-click the window’s icon.
2. Click the **New** button.

To choose keys after you enter a window:

1. Click the **Services** menu and click the **Choose Keys** choice.
2. In the list box, scroll to and double-click desired value.
3. Repeat step 2 until all initial values are selected.

To sort records:

1. Click the desired sort field at the top of the list.

Or

1. Position the selection pointer over a record
2. Using the *right* mouse button, click the record.
3. From the object menu, click the **Sort** choice.
4. Click the **Add** button.
5. In the **Field** drop-down list, click the expand arrow to the right of the current selection and click the desired field.
6. In the **Order** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
7. To add additional sorts, click the **Add** button.
8. Repeat steps 4-7 until you have selected all sorts.
9. Click **OK**.

To find specific records:

1. Position the selection pointer over a record.
2. Using the *right* mouse button, click the record.
3. From the object menu, click the **Find** choice.
4. Click the **Add** button.
5. In the **Field** drop-down list, click the expand arrow to the right of the current selection and click the desired field.
6. In the **Condition** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
7. In the **Value** field, select the current entry and type the desired value.
8. To add additional conditions, click the **Add** button.
9. In the **Join** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
10. Repeat steps 5-9 until you have selected all conditions.
11. Click **OK**.

To filter records:

1. Position the selection pointer over a record
2. Using the *right* mouse button, click the record.
3. From the object menu, click the **Filter** choice.
4. Click the **Add** button.
5. In the **Field** drop-down list, click the expand arrow to the right of the current selection and click the desired field.
6. In the **Condition** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
7. In the **Value** field, select the current entry and type the desired value.
8. To add additional conditions, click the **Add** button.
9. In the **Join** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
10. Repeat steps 5-9 until you have selected all conditions.
11. Click **OK**.

To clear a filter:

1. Position the selection pointer over a record
2. Using the *right* mouse button, click the record.
3. From the object menu, click the **Filter** choice.
4. Click the **Clear** button.
5. Click **OK**.

To view System Attachments:

1. Double click the **Accessories** icon.
2. Double-click the **System Attachments** icon.
3. Double-click the attachment you wish to run.

To access Help by Contents:

1. Click the **Help** menu and click the **Contents** choice.
   Or
   Click the **Help** button.
   Or
   In a SiteManager window, press the **F1** key.
2. In the topics list box, scroll to and click the desired topic.
3. When finished, click the **File** menu and click the **Exit** choice.

To access Help by searching:

1. Click the **Help** menu and click the **Search for Help on** choice.
2. Type the topic on which you need help.
3. Click the topic.
4. Click the **Display** button.
5. When finished, click the **File** menu and click the **Exit** choice.

To access Help on the current window:

1. Display the SiteManager window for which you need help.
2. Click the **Help** menu and click the **Current Window** choice.
3. When finished, click the **File** menu and click the **Exit** choice.

To access Help on a field:

1. Display the SiteManager window that has the field for which you need help.
2. Click the **Help** menu and click the **Current Window** choice.
3. In the field list, scroll to and click the desired field.
4. When finished, click the **File** menu and click the **Exit** choice.

To access the User Manual documentation:

1. On the Main Panel, double-click the **Manuals** icon.
2. Double-click the **User Manual** icon.

To generate any report:

1. Double-click the desired report icon.
2. Select the criteria.
3. Click **OK**.

To save a report:

1. Click the **Save** button.
2. Type the name for the file.
3. Change the drive and directory as desired.
4. Click **Save**.
5. Click **OK**.

To open a saved report:

1. Double-click the **View Saved Reports (PSR)** icon on the Reports Tab.
2. Change the drive and directory as needed.
3. Select the PSR file.
4. Click **Open**.

To run a process:

1. Navigate to the panel where the process is assigned.
2. Double-click the **Process List** icon.
3. In the process list, double-click the desired process.
4. Click the **Submit** button.

To access TDOT custom reports:

1. Launch Internet Explorer.
2. Access web address **http://jj00wa272/businessobjects/Enterprise115/InfoView/main.aspx**.
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.

Summary Exercise for Section 1

In the following summary exercise, you will navigate through SiteManager.

User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022C**

1. Log into SiteManager as **jj05754**.
2. Navigate to the **Items** window
(Main Panel > Contract Administration > Contract Records > Items).
3. Select the first project for Contract **CNB022C**, and then any of the available items.
4. Are you in inquiry or update mode? ____
5. Click the **Close** button to close the **Items** window.
6. Navigate to the **Item Master** window
(Main Panel > Contract Administration > Reference Tables > Item Master).
7. Use the **Find** feature to find the Item Code **204-06** for Spec Year **2000**.
8. What is the Item Description? ____
9. **Filter** for short description **%CLEARING%**.
10. What is the first item retrieved? ____
11. Clear the filter.
12. Click the **Close** button to close the **Item Master** window.
13. Navigate to the **Milestone**s window (Contract Administration > Contract Records > Milestones).
14. Access **Help** on the current window.
15. Click the **Close** button to close the **Milestones** window.
16. Navigate to the **User Manual** and find the **Estimate Generation** topic.
17. Click the **Close** button to close the **User Manual** window.
18. Navigate to the **Contractor Payment Report**s panel.
(Main Panel > Contractor Payments > Reports)
19. In **Contractor Payment Reports**, run an **Installed Work Report** for contract **CNB022L**.
20. In Contractor Payments, navigate to the **Process List**.
21. Exit SiteManager.

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Section 2 Contract Administration
for Management Personnel

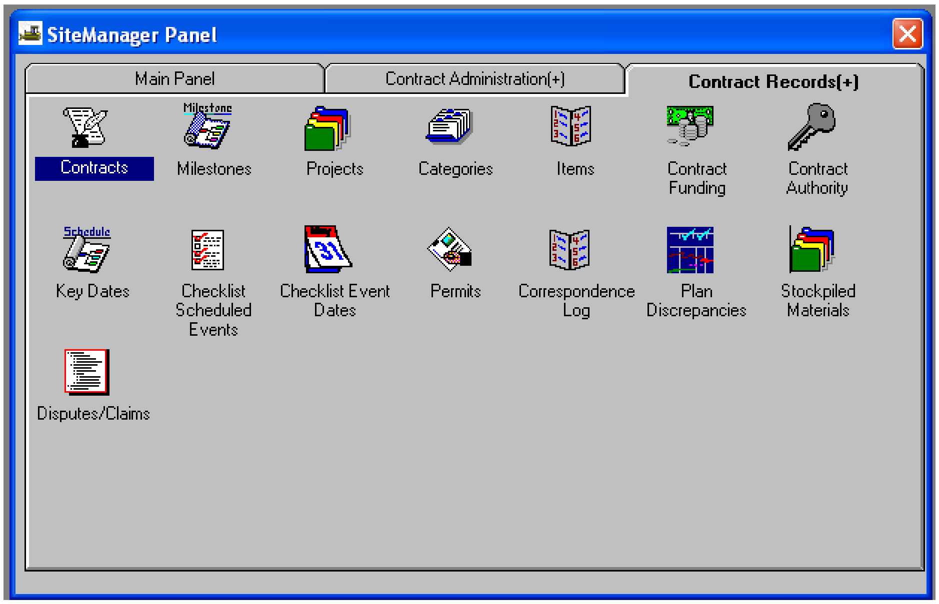
By the end of this module, you will be able to:

- View an active Contract
- View Subcontracts

May 2007

New Contracts

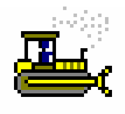
This module describes the Contract information available to you through SiteManager's windows and data entry fields. New Contracts are typically loaded electronically from the pre-construction system, PES and LAS, and given pending status by default.



The Contract Records Panel

Figure 2-1

To begin tracking the progress of the Contract work in SiteManager, the Headquarters Finance Office will change the Contract's status to active.



Exercise 2-1

In the following exercise, you will navigate to the Contract window.

User ID: **jj05757**   Group: **DCONREP**   Contract: **CNB022E**

1. Double-click the **SiteManager Training** program icon on your desktop.
2. In the **User ID** field, type **jj05757**.
3. Press the **Tab** key.
4. In the **Password** field, type **pass**.
5. Press the **Enter** key.
6. In the **Available Groups for jj05757** list, double-click **DCONREP**.
7. On the **Main Panel** folder tab, double-click the **Contract Administration** icon.
8. On the **Contract Administration** folder tab, double-click the **Contract Records** icon.
9. On the **Contract Records** panel, double-click the **Contracts** icon.
10. In the **Contract ID** list box, scroll to and double-click Contract ID **CNB022E**.

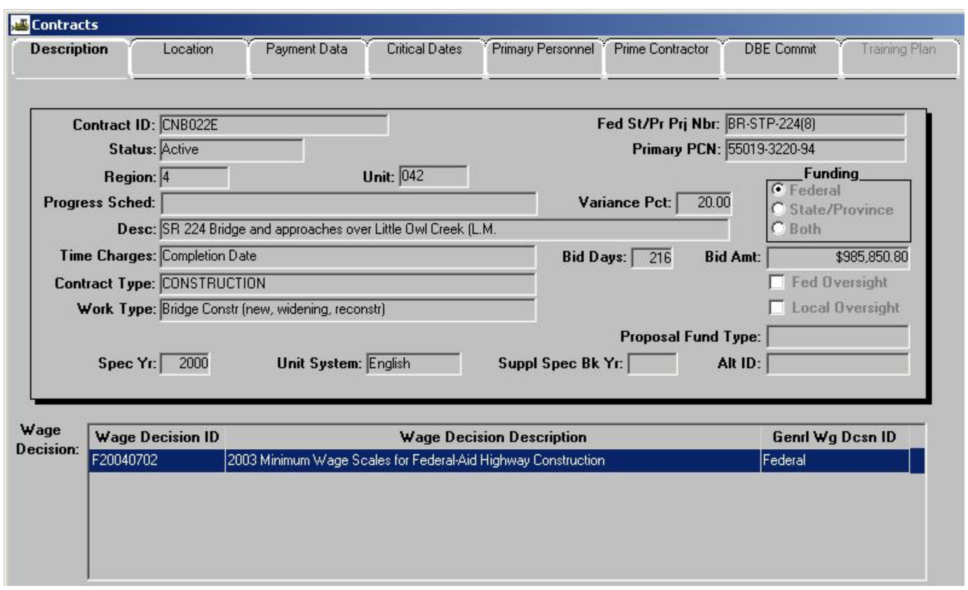
Viewing a Contract

The Description folder tab of the Contract window 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 AND Milestones are:

- Completion Date - Similar to TDOT "Calendar Days" contracts for non-resurfacing and non-mowing contracts. In SiteManager, TDOT Mowing, Litter Removal, and Sweeping & Drain cleaning contracts are Completion Date.   Time cannot be suspended on Completion Date Contracts.
- Calendar Day - TDOT's Resurfacing Contracts (Completion Date contracts with a working window) are Calendar Day in SiteManager, with a set number of bid days. Time is started when the Notice to Proceed date is entered. Milestones noted in special provision 108B, such as phased construction and mowing and litter cycles, are also Calendar Date time. Time cannot be suspended on Calendar Day Contracts.
- Available Work Days - Similar to TDOT's Working Days. Time is charged on a daily basis in the SiteManager Diary window.

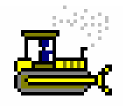


The Description Folder Tab

Figure 2-2

In TDOT, most of the fields on the Contract window are loaded from PES and LAS and will not be modified in SiteManager except by the Headquarters Construction and Finance Offices.

TDOT will primarily use the Completion Date Contract Time Charge type.



Exercise 2-2

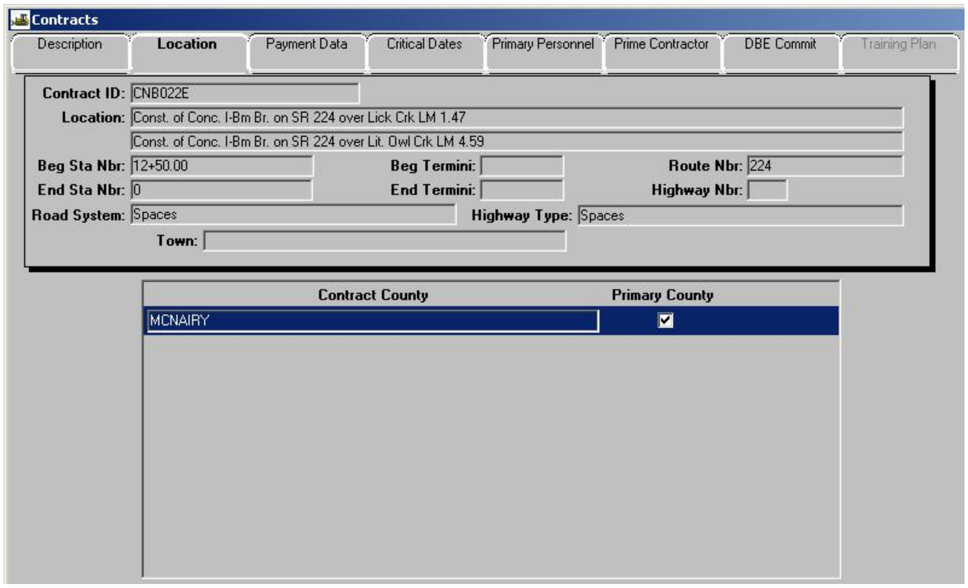
In the following exercise, you will view the description for new active Contract CNB022E.

User ID: **jj05757** Group: **DCONREP** Contract: **CNB022E**

1. What region and unit is this contract assigned to?
   ____
2. How is time calculated on this contract?
   ____
3. What is the value of this contract? __________________

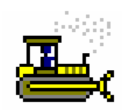
Viewing the Contract Location

The Location folder tab displays the Contract location. Each Contract must have one county selected as the primary county.



The Location Folder Tab

Figure 2-3



Exercise 2-3

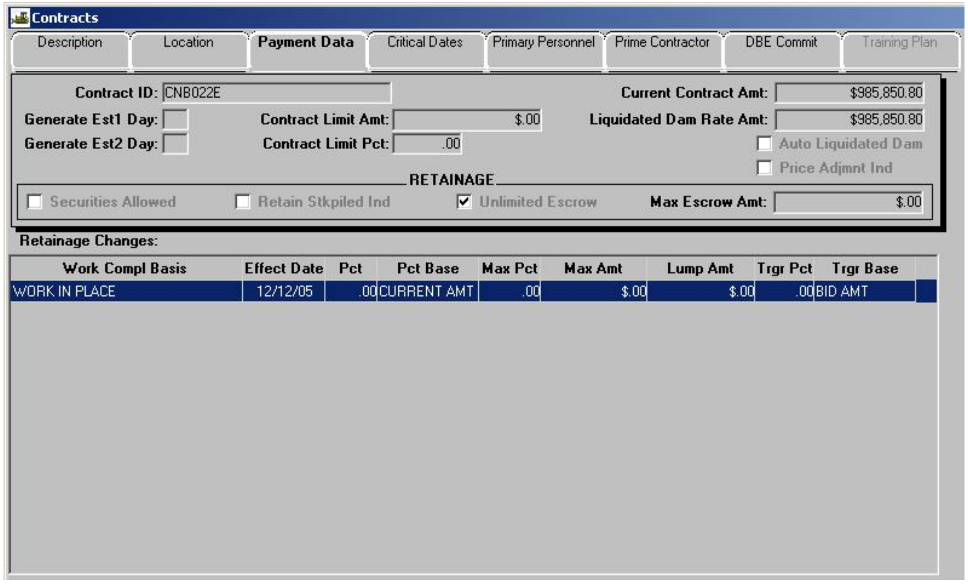
In the following exercise, you will view the location for Contract CNB022E.

User ID: **jj05757** Group: **DCONREP** Contract: **CNB022E**

1. Click the **Location** folder tab.
2. What is the Primary County of Contract CNB022E? _____________

Viewing Contract Payment Data

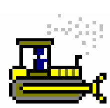
The Payment Data folder tab can be used to automatically calculate common construction computations.



The Payment Data Folder Tab

Figure 2-4

In TDOT, the functions of this window will not be used.



Exercise 2-4

In the following exercise, you will view the payment data for Contract CNB022E.

User ID: **jj05757** Group: **DCONREP** Contract: **CNB022E**

1. Click the **Payment Data** folder tab.

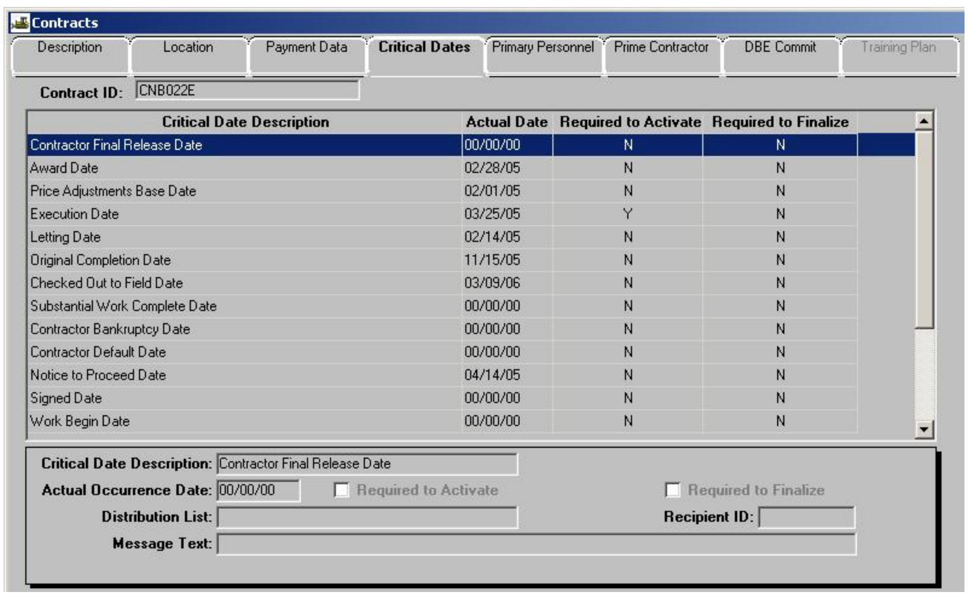
Viewing Critical Dates

The Critical Dates folder tab 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 pre-construction system, PES and LAS, SiteManager includes the Critical Date types defined in the Default Critical Date reference table. A few of the dates, such as Letting Date, come over from the pre-construction system.

When an Actual Date is entered, the system can send notices to an individual recipient.

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

- It must be entered before any Estimates may be generated
- It starts charging time against the contract for Fixed Completion Date contracts



The Critical Dates Folder Tab

Figure 2-5

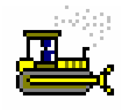
In the TDOT, the Critical Dates folder tab is updated by the Headquarters Construction and Finance Offices.

In TDOT, the Notice to Proceed is updated by the Headquarters Finance Office when the Starting Notice Report is received from the Office Staff.

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

The TDOT Equivalents to Default Critical Dates

Table 2-1



Exercise 2-5

In the following exercise, you will view the Actual Date of a Contract Critical Dates for Contract CNB022E.

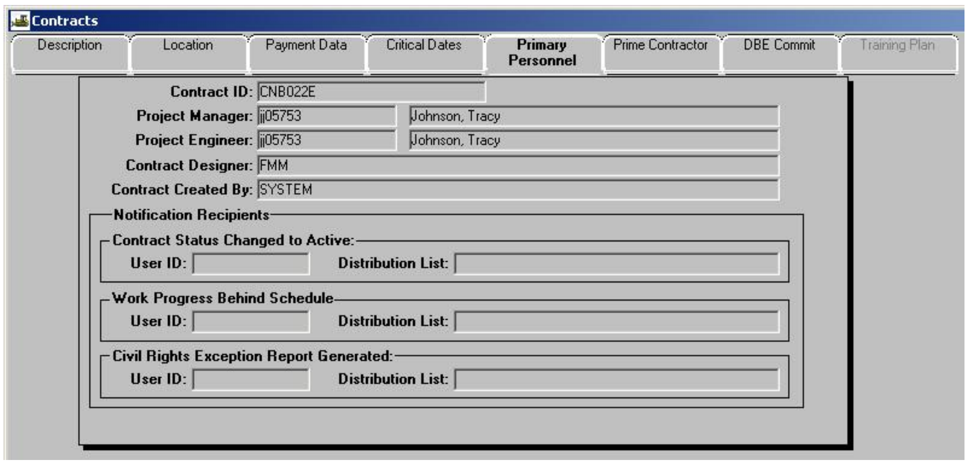
User ID: **jj05757** Group: **DCONREP** Contract: **CNB022E**

1. Click the **Critical Dates** folder tab.
2. In the **Critical Date Description** list box, scroll to and click **Notice to Proceed Date**. The data for the Notice to Proceed Date is displayed below the list.
3. What is the **Notice to Proceed Date** ? _______________________
4. What is the **Original Completion Date**?_____________________

Viewing Contract Primary Personnel

The Primary Personnel folder tab displays Contract's primary State personnel. Every Contract must have a Project Manager and a Project Engineer. When a user is designated as the Project Manager and/or Project Engineer on the Contract, SiteManager adds that user to Contract Authority automatically. If primary personnel are later replaced, SiteManager starts authority for the new personnel and ends authority for the previous personnel.

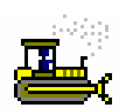
The terms Project Manager and Project Engineer are SiteManager terms and have no particular significance other than the fact that they are the first two to receive Contract Authority.



The Primary Personnel Folder Tab

Figure 2-6

At TDOT, the Headquarters Construction Office will enter the assigned Project Supervisor in both the Project Manager and Project Engineer field.



Exercise 2-6

In the following exercise, you will view the Project Manager and Project Engineer assignments for contract CNB022E.

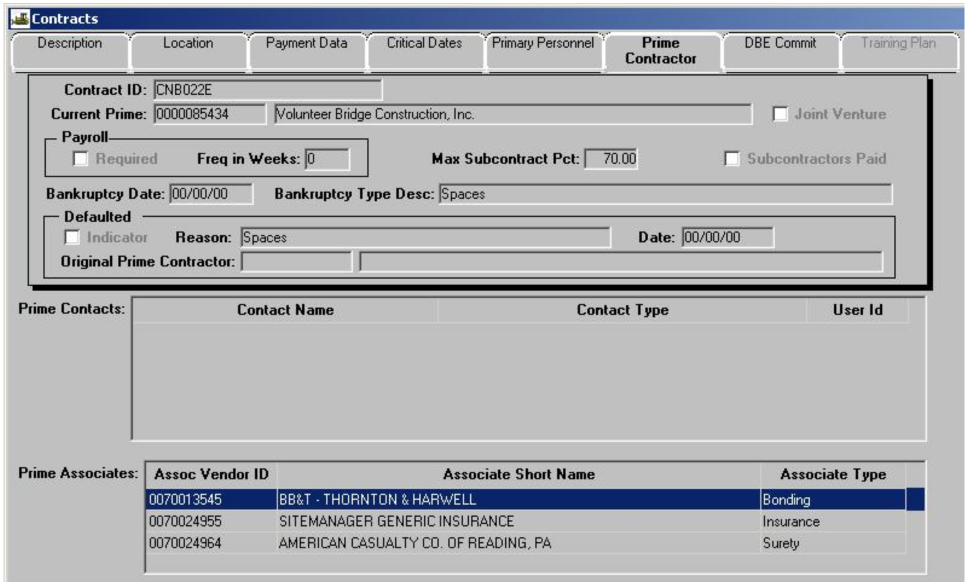
User ID: **jj05757**   Group: **DCONREP**   Contract: **CNB022E**

1. Click the **Primary Personnel** folder tab.
2. Who is the **Project Supervisor** for Contract **CNB022E**?

   ____

Viewing the Prime Contractor and Associates

The Prime Contractor folder tab displays the Prime Contractor, the Prime Contacts, and the Prime Associates. At a minimum, SiteManager requires a Prime Contractor, Surety company, and Insurance company to be designated.

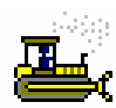


The Prime Contractor Folder Tab

Figure 2-7

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**
- **Surety**



Exercise 2-7

In the following exercise, you will view the Prime Contractor’s surety and insurance companies for Contract CNB022E.

User ID: **jj05757**   Group: **DCONREP**   Contract: **CNB022E**

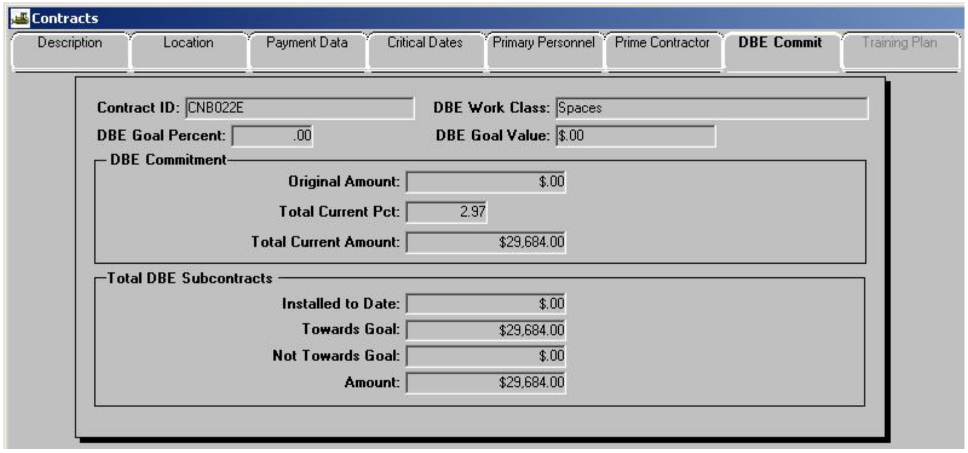
1. Click the **Prime Contractor** folder tab.
2. Who is the Prime Contractor? ________________________
3. Who is the Bonding Company?

   ____
4. Who is the Surety Company?

   ____

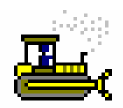
Viewing the DBE Commitment Goal

The DBE Commit folder tab 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 folder tab. The system calculates the DBE commitment amounts displayed on this folder tab using values entered on the Subcontracts panel.



The DBE Commitment Folder Tab

Figure 2-8



Exercise 2-8

In the following exercise, you will view the DBE goal.

User ID: **jj05757** Group: **DCONREP** Contract: **CNB022E**

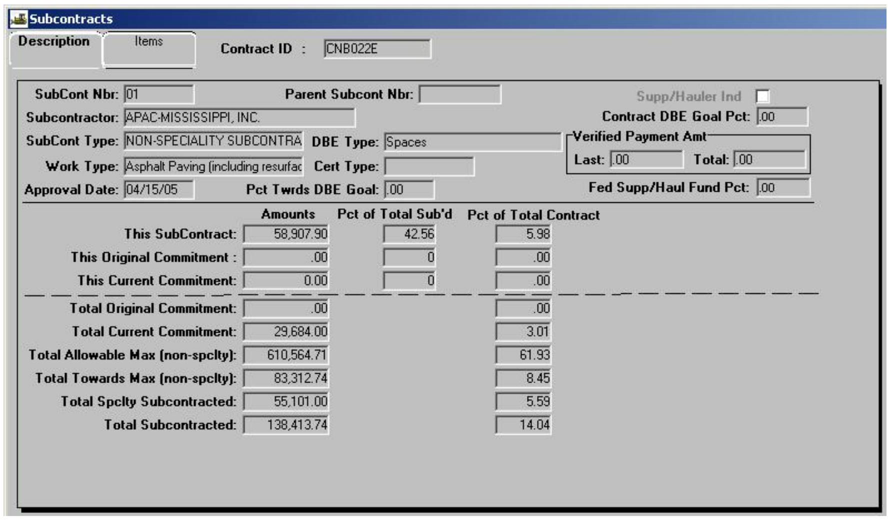
1. Click the **DBE Commit** folder tab.
2. What is the DBE Commitment Total Current Pct?______________
3. Click the **Close** button.

The Training Plan Folder Tab

The Training Plan folder tab is grayed out because it is obsolete functionality deactivated by AASHTO.

Viewing a Subcontract

The Subcontract panel lets the User add, modify, and delete Subcontracts and Subcontract data. The panel also displays calculated DBE commitment amounts. The User can define both parent Subcontracts and lower level Subcontracts.



The Subcontracts Description Folder Tab

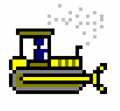
Figure 2-9

In TDOT, HQ Construction will load all Subcontracts into SiteManager and enter the approval date. The field office will add the equipment and personnel to the subcontract's DWR Master List for the Contract.

Subcontract Descriptions

The User enters the Subcontractor and DBE commitments on the Description folder tab. To be selected as a Subcontractor, a Contractor must first be entered as a vendor in the Vendor reference tables. When a new Subcontract is saved, the system adds the Subcontract amount to the total amount of uncompleted work for the Subcontractor. This value is displayed on the Vendors panel in Reference Tables (CA). 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 or not 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 (i.e., 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.



Exercise 2-9

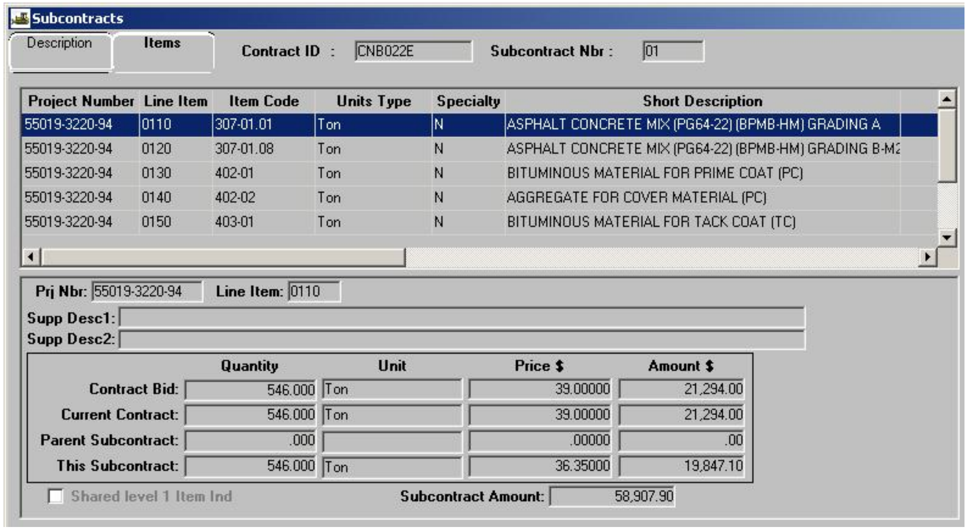
In the following exercise, you will view a Subcontract description for Contract CNB022E.

User ID: **jj05757** Group: **DCONREP** Contract: **CNB022E**

1. Click the **Contract Administration** folder tab.
2. On the **Contract Administration** panel, double-click the **Contractor Management** icon.
3. On the **Contractor Management** panel, double-click the **Subcontracts** icon.
4. How many subcontracts are there for Contract **CNB022E**?________
5. How many subcontracts are DBEs for Contract **CNB022E**? ______
6. In the **Subcontract** list box, scroll to and double-click Subcontract Number **01 APAC-MISSISSIPPI, INC**.
7. What is the approval date for this subcontract?__________________
8. What is the amount of this subcontract?________________________
9. Is this a nested subcontract? ________________________________

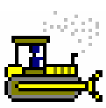
Viewing Subcontract Items

The Subcontract Items folder tab lets the User add, modify, and delete Subcontract Items. If the Subcontractor is a hauler or supplier only, the Subcontract will not have Items. If the Subcontract has no Items, the User must enter the Subcontract Amount manually. If the Subcontract has Items, the Subcontract Amount is the sum of all of the Item amounts and the User cannot modify it.



The Subcontracts Items Folder Tab

Figure 2-10



Exercise 2-10

In the following exercise, you will view a Subcontract item for Contract CNB022E.

User ID: **jj05757** Group: **DCONREP** Contract: **CNB022E**

1. Click the **Items** folder tab.
2. How many items are on this subcontract?________________________
3. What is the total quantity and dollar amount for Project Number **55019-3220-94**, Line Item **0110,** Item Code **307-01.01,** Short Description **Asphalt Concrete Mix**?___________________________
   ____
4. Click the **Close** button.

Review for Section 2

To view a Contract's description:

1. On the **Main Panel**, double-**click Contract Administration** icon.
2. On the **Contract Administration** panel, double-click the **Contract Records** icon.
3. On the **Contract Records** panel, double-click the **Contracts** icon. The Contracts panel opens.
4. Click the **Open** button. The Select Contract list is displayed.
5. In the **Select Contract** list box, scroll to and double-click the **Contract ID** or perform a **Find**. The Select Contract list closes and the Description folder tab is displayed.

To view a Contract's location:

1. On the **Contract Records** panel, double-click the **Contracts** icon. The Contracts panel opens.
2. Click the **Open** button. The Select Contract list is displayed.
3. In the **Select Contract** list box, scroll to and double-click the **Contract ID** or perform a **Find**. The Select Contract list closes and the Description folder tab is displayed.
4. Click the **Location** folder tab.

To view a Contract's payment data:

1. On the **Contract Records** panel, double-click the **Contracts** icon. The Contracts panel opens.
2. Click the **Open** button. The Select Contract list is displayed.
3. In the **Select Contract** list box, scroll to and double-click the **Contract ID** or perform a **Find**. The Select Contract list closes and the Description folder tab is displayed.
4. Click the **Payment Data** folder tab.

To view the Actual Date of a Contract Critical Date:

1. On the **Contract Records** panel, double-click the **Contracts** icon. The Contracts panel opens.
2. Click the **Open** button. The Select Contract list is displayed.
3. In the **Select Contract** list box, scroll to and double-click the **Contract ID** or perform a **Find**. The Select Contract list closes and the Description folder tab is displayed.
4. Click the **Critical Dates** folder tab.
5. In the **Critical Date Description** list box, scroll to and click the date. The data for the selected date is displayed below the list.

To view Primary Personnel for a Contract:

1. On the **Contract Records** panel, double-click the **Contracts** icon. The Contracts panel opens.
2. Click the **Open** button. The Select Contract list is displayed.
3. In the **Select Contract** list box, scroll to and double-click the **Contract ID** or perform a **Find**. The Select Contract list closes and the Description folder tab is displayed.
4. Click the **Primary Personnel** folder tab.

To view a Prime Contractor:

1. On the **Contract Records** panel, double-click the **Contracts** icon. The Contracts panel opens.
2. Click the **Open** button. The Select Contract list is displayed.
3. In the **Select Contract** list box, scroll to and double-click the **Contract ID** or perform a **Find**. The Select Contract list closes and the Description folder tab is displayed.
4. Click the **Prime Contractor** folder tab.

To view the DBE goal for a Contract:

1. On the **Contract Records** panel, double-click the **Contracts** icon. The Contracts panel opens.
2. Click the **Open** button. The Select Contract list is displayed.
3. In the **Select Contract** list box, scroll to and double-click the **Contract ID** or perform a **Find**. The Select Contract list closes and the Description folder tab is displayed.
4. Click the **DBE Commitments** folder tab.

To view a Subcontract:

1. On the **Contractor Management** panel, double-click the **Subcontracts** icon. The **Subcontracts** panel opens.
2. Click the **Open** button. The **Select Contract** panel opens.
3. In the **Contract ID** list box, scroll to and double-click the Contract.
4. In the **Subcontract** list box, scroll to and click the Subcontract.
5. Click **OK**. The panel 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 **Subcontracts** panel opens.
2. Click the **Open** button. The **Select Contract** panel opens.
3. In the **Contract ID** list box, scroll to and double-click the Contract.
4. In the **Subcontract** list box, scroll to and click the Subcontract.
5. Click **OK**. The panel displays data for the selected Subcontract.
6. Click the **Items** folder tab.

Summary Exercise for Section 2

In the following exercise, you will review Contract CNB022F.

User ID: **jj05757** Group: **DCONREP** Contract: **CNB022F**

1. Navigate to the **Contracts** window.
2. Open Contract ID **CNB022F**.
3. What is the Work Type for this contract? ______________________________________
4. What Region and Unit is this Contract Assigned to? ____________________________
5. What is the Time Charge? ____
6. What is the Execution Date of the contract? ____________________________________
7. What is the bonding company? ____
8. Navigate to the **Contractor Management** folder tab.
9. Open the **Subcontracts** window and open Subcontract **02 INTERNATIONAL TRAFFIC SYSTEMS, INC.** on **CNB022F**.
10. Is this subcontractor a DBE? ____
11. Is this Subcontractor approved to begin working on this Contract? __________________
12. Is this subcontractor approved to install Line Item **0610, Item Code 730-50**? ________
13. Exit SiteManager.

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Section 3 Estimate Basics & Approval

for Management Personnel

By the end of this module, you will be able to:

- Understand the Basic Concepts of Daily Work Reports
- View DWR
- View Diary
- View In-Box Estimate Message
- View the Estimate Summary
- View Estimate Discrepancies
- Generate the Summary To Contractor Report
- Approve Estimates
- Track Estimates

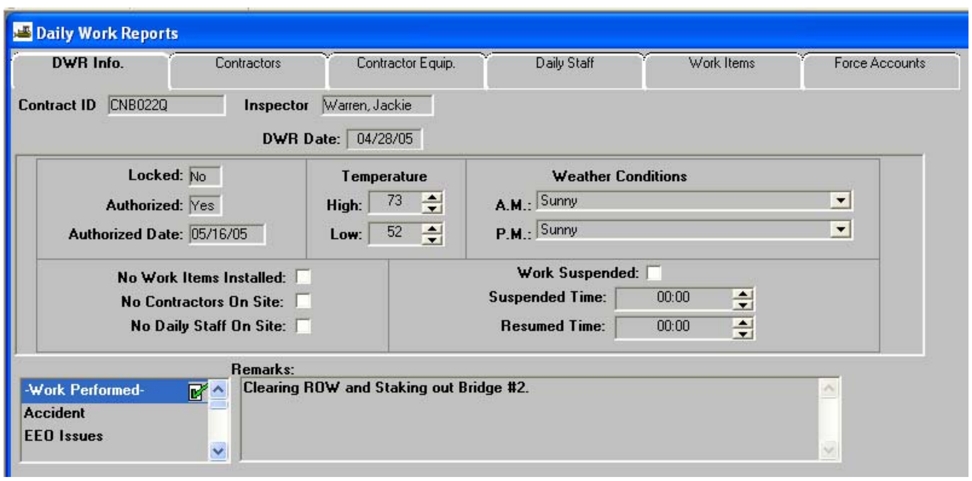
May 2007

Daily Work Reports I

The User creates daily records of construction activity in Daily Work Reports. SiteManager lets the User create DWRs on the workstation in the field. Before the Inspector can create the first DWR for a Contract in standalone mode, the Contract plan data must be downloaded from the SiteManager Server database to the User's workstation. After the User pipelines the Contract plan data onto the workstation's local database, the User can begin creating DWRs in standalone. 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 of 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 in standalone mode. 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:

- The Daily Work Report has been transferred to the server or standalone database
- The Daily Work Report has been authorized
- The Daily Work Report was authored by another User



The DWR Info Folder Tab

Figure 3-1

In TDOT, the Inspector will complete a DWR for every day during the life of a project, including weekends and holidays. DWRs may also be created by Field Office personnel.

A DWR may be created in Standalone Mode or Server Mode.

In TDOT, 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 Remarks type "Work Performed," the field user should enter contractor's name and details regarding item work progress.

The Daily Work Reports window has the following folder tabs:

DWR Info

The DWR Info folder tab lets the User create a new DWR and collect information about the day for which the report was created.

Contractors

The Contractors folder tab lets the User enter daily data about the Prime and Subcontractor(s), Supervisor(s), and variable labor (by personnel type).

Contractors Equip

The Contractor Equip folder tab lets the User document the daily presence and use of equipment on the job site for a selected Contractor.

Daily Staff

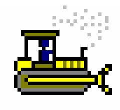
The Daily Staff folder tab lets the User enter daily information on state employees and consultants. Each entry shows how many hours the staff member worked, the type of work performed, and data on state vehicle usage.

Work Items

The Work Items folder tab lets the User view and add daily usage data for installed Work Items.

Force Accounts

TDOT will not use this feature.



Exercise 3-1

In the following exercise, you will log on as a Project Supervisor and view a Daily Work Report.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022Q**

1. Double-click the **SiteManager Training** program icon on your desktop.
2. In the **User ID** field, type **jj05753**.
3. Press the **Tab** key.
4. In the **Password** field, type **pass**.
5. Press **Enter**.
6. On the **Main Panel**, double-click the **Daily Work Reports** icon.
7. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
8. Click the **Open** button.
9. In the **Contract list** box, scroll to and double-click Contract **CNB022Q**.
10. In the **Inspector** list box, scroll to and double-click Inspector **Warren, Jackie**.
11. In the **Date** list box, scroll to and double-click **04/28/05**.
12. Click the **OK** button in response to the message.
13. Click the **Contractors** folder tab.
14. Click the **Contractor Equip**. folder tab.
15. Click the **Daily Staff** folder tab.
16. Click the **Work Items** folder tab.
17. In the **Work Item** list box, scroll to and double-click Line Item Number **0110**, Category **0100**, Project **55019-3220-94 ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A.**
18. Click the **DWR Template** button.
19. Double-click Template ID **SM39**.
20. Click the **Close** button to close the template.
21. Click the **Close** button to close the DWR.

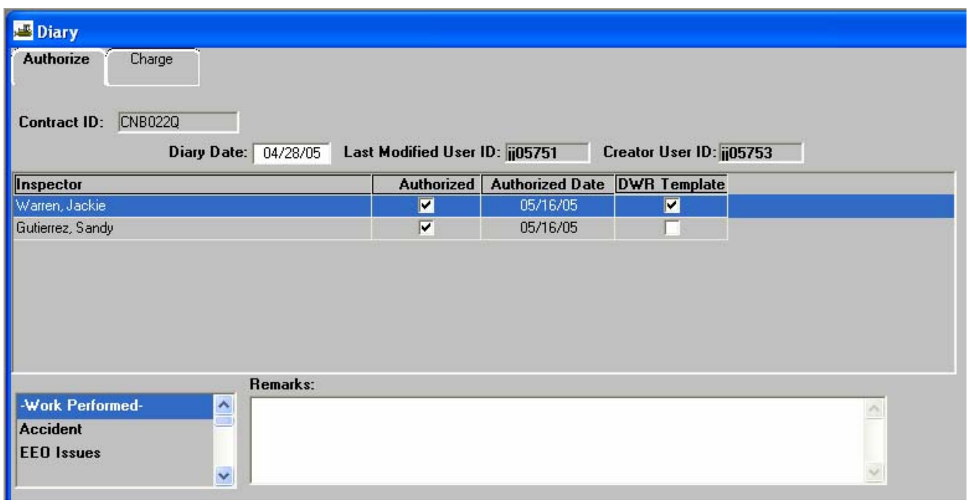
Diary Overview

Each Diary is a daily collection of the authorized Daily Work Reports submitted by all personnel working on the Contract. Only one Diary can be created per day per Contract. Diaries can also be created for days when no Daily Work Reports are collected. The Diary panel has two folder tabs:

- Authorize (approving for payment)
- Charge

The User uses the Diary window to perform five functions:

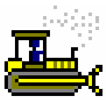
- Create a new or open an existing Diary for a specific contract and day
- Preview Daily Work Reports for a specific contract and day
- Authorize them (or not) for payment on the next estimate.
- Apply Charges for a specific contract and day
- Make Remarks



The Authorize Folder Tab

Figure 3-2

In TDOT, the Lead Inspector or Project Supervisor will create a Diary for each day during the life of a contract, including weekends and holidays. The Lead Inspector or Project Supervisor will review and authorize all applicable DWRs associated with the Diary.



Exercise 3-2

In the following exercise, you will view the Diary window.

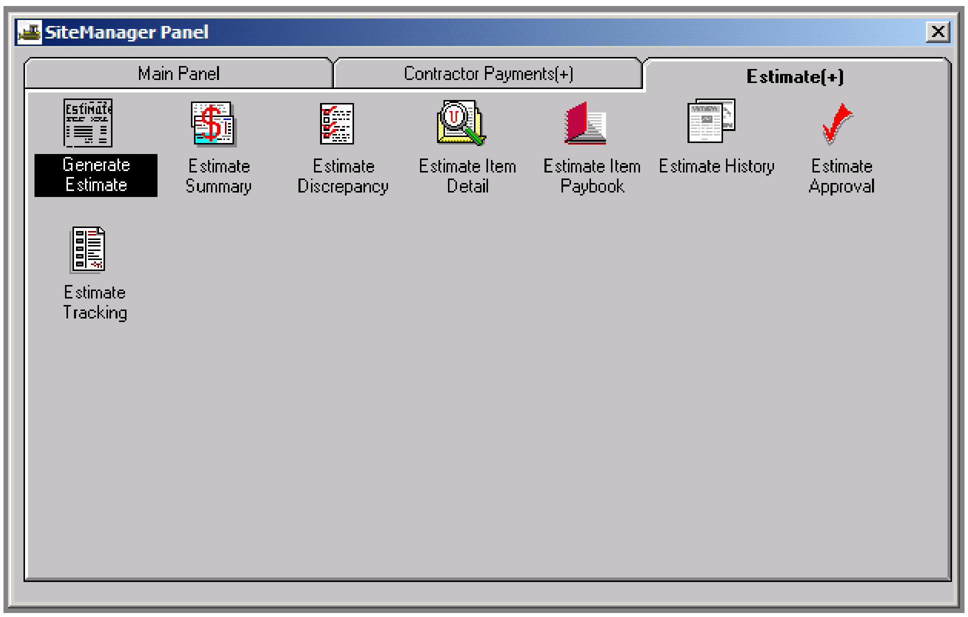
User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022Q**

1. On the **Daily Work Reports** panel, double-click the **Diary** icon.
2. Click the row for Inspector **Warren, Jackie**.
3. Click the **Preview DWR** button.
4. Click the **Close** button to close the preview.
5. Click the **Close** button to close the Diary.
6. Click the **Main Panel** folder tab.

SiteManager Estimates Overview

The Estimate Generation process manages the Estimate functionality from the generation of an Estimate through the creation of the extract file for the transportation agency's financial system. The functionality is divided into the following areas:

- Generation of the Estimate
- Review of Estimate Summary information
- Resolution of Estimate discrepancies
- Review of Estimate item details
- Approval of the Estimate
- Tracking of the Estimate status



The Estimate Panel

Figure 3-3

The Estimate generation process allows the user to generate an Estimate for the Contract. The user selects to generate a progress or a final Estimate from the Contractor Payments component. The system then performs a background process which performs the following activities:

- **Delete pending Estimate.** This activity deletes any previous pending Estimate which has been calculated but not approved. The deletion will remove only details tied to the previous pending Estimate.
- **Determine quantities for payment.** This activity will determine the quantity to be paid for each line item on the Contract which has items installed for the Estimate period.
- **Calculate stockpiled materials.** This activity will determine if an installed item has stockpiled materials. If it does, the process will use a stockpiled materials conversion factor to add a new line item adjustment to adjust the amount of payment which is to be made for the line item.
- **Identify discrepancies.** This activity checks for and reports 'discrepancies' for the work being performed by defined rules and conditions, e.g., actual completion dates for milestones with projected completion dates during the Estimate period. This activity provides a window with discrepancy details for the Project Supervisor so that proactive steps can be taken for various project issues.
- **Determine Funding Amounts.** This activity will calculate the funding amount for the different funding sources based upon the funding given for the Contract, project, category or item.

TDOT Estimate Generation Schedule

In TDOT, all Progress Estimates are generated by the Office Staff of the Unit assigned the contract. Before the Estimate Generation and Reconciliation Cycle can begin, the Inspection staff must pipeline all DWRs through the DWR Ending Date for their region to the server. The following table outlines the Estimate Generation schedule for each of the Regions.

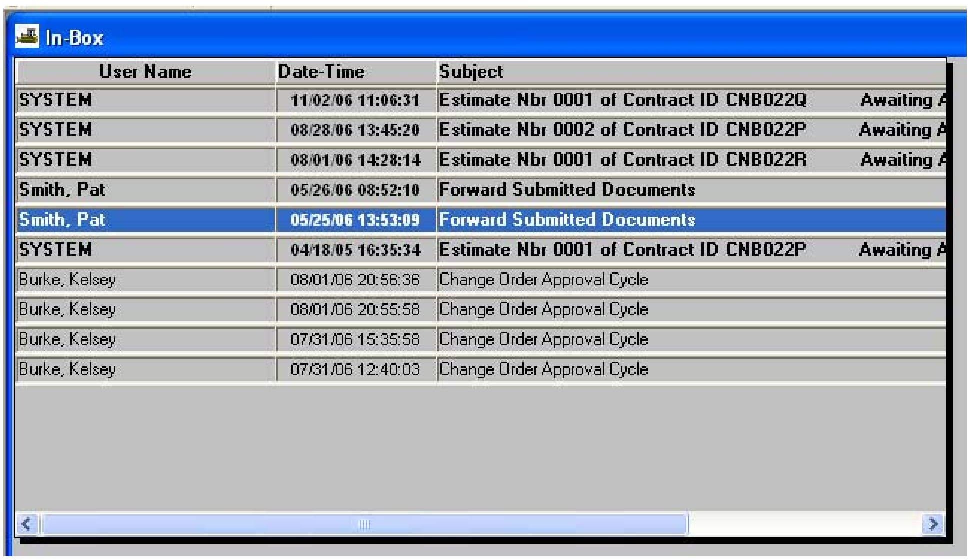
Region	First DWR Date	Ending DWR Date (Estimate End Date)	First Day Office Staff Can Generate Estimate
Region 1	21st day of the previous month	Through 20th day of the current month	21st day of the current month
Region 2	1st day of the previous month	Through the last day of the previous month	1st day 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

The TDOT Progress Estimate Generation Schedule

Table 3-1

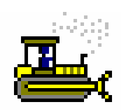
Viewing an In-Box Estimate Approval Request Message

As part of the estimate approval process, when an estimate is created and approved at a lower approval level, SiteManager generates a system message notifying the next user in the approval process that an estimate is ready for review and approval. This message appears in the user's In-box.



The In-Box Window

Figure 3-4



Exercise 3-3

In the following exercise, you will view a message on the In-box window for contract CNB022Q, Estimate 0001.

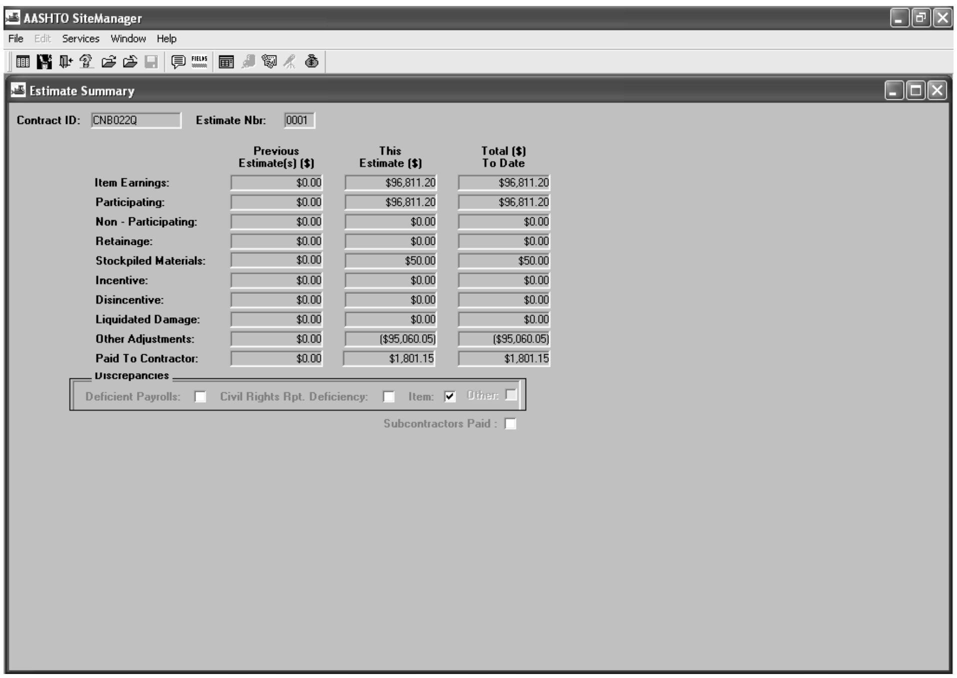
User ID: **jj05753**   Group: **PJSUPS**   Contract: **CNB022Q**

1. On the **Main Panel**, double-click the **Accessories** icon.
2. On the **Accessories** panel, double-click the **In-Box** icon.
3. Double-click the message titled **Estimate Number 0001 for CNB022Q Awaiting Approval**. The Estimate Approval window opens.
4. In the **Contract** list box, double-click Contract **CNB022Q**.
5. Click the **Close** button to close the window with out approving the estimate.
6. Click the **No** button.
7. Click the **Close** button.
8. Click the **Main Panel** folder tab.

Viewing the Estimate Summary

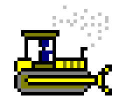
The Estimate Summary window allows the User to view calculated Estimate summary information. It may be accessed from the Estimate panel or from the In-Box. The window shows three sets of totals:

- Previous Estimate(s) - Combined totals for previous Estimate(s)
- This Estimate – totals for the current Estimate
- Totals to date – combined totals for all Estimates



The Estimate Summary Window

Figure 3-5



Exercise 3-4

In the following exercise, you will view the Estimate Summary window for contract CNB022Q.

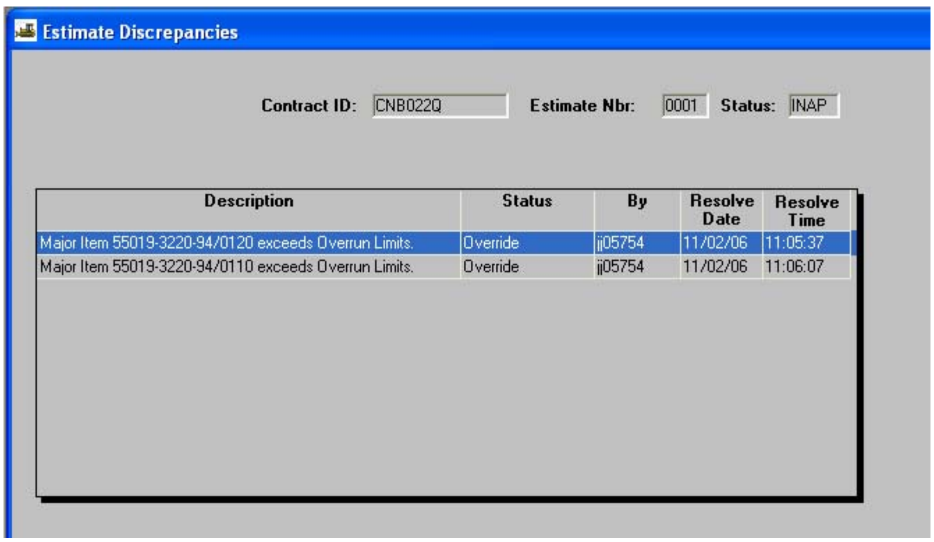
User ID: **jj05753**   Group: **PJSUPS**   Contract: **CNB022Q**

1. On the **Main Panel**, double-click the **Contractor Payments** icon.
2. On the **Contractor Payments** panel, double-click the **Estimate** icon.
3. On the **Estimates** panel, double-click the **Estimate Summary** icon.
4. Double-click Estimate number **0001**.
5. What is the amount paid to the contractor on this estimate? ______________________
6. Are there discrepancies on this estimate? ______________________
7. Click the **Close** button.

Viewing Estimate Discrepancies

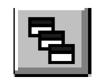
SiteManager identifies the discrepancies associated with an Estimate and displays them in the Estimate Discrepancy window. The discrepancies are of two levels: discrepancies at the Estimate level and discrepancies at the item level. For instance, if a Checklist Event Date is not met, the discrepancy is associated to the Estimate. If an item overrun is displayed, the discrepancy is associated with the specific line item.

Estimate discrepancies are listed at the top of the Estimate Discrepancy window, and the item discrepancies are listed after them. The Status field values are either 'Unresolved' or 'Override.' When the Recalculate Discrepancies function is selected from the Services menu, or if the Estimate is regenerated, the discrepancies are re-determined.



The Estimate Discrepancy Window

Figure 3-6



The Navigate Button

Figure 3-7

TDOT Discrepancy Types

There are four types of discrepancies utilized at TDOT. Each are identified using different criteria.

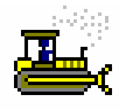
Overrun Discrepancy – Occurs if a major item is overrun by 5 percent or more and a minor item overrun by 10% or more.

Milestone Completion Date Missed Discrepancy – Occurs if a milestone has not been completed within the time frame specified on the Milestones window.

Contract Completion Date Missed Discrepancy – Occurs if work is recorded on a DWR beyond the Contract Completion Date specified on the Contracts window/Critical Dates folder tab.

Checklist Event Completion Date Missed Discrepancy – Occurs if the Actual Date of the Checklist Event has not been entered on the Checklist Event Dates window within the time frame specified on the Checklist Scheduled Events window.

In TDOT, if an estimate discrepancy on a Progress Estimate cannot be resolved, the discrepancy must be overridden with an explanation.



Exercise 3-5

In the following exercise, you will review an Estimate Discrepancy on Estimate 0001 for contract CNB022Q.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022Q**

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon.
2. Click the discrepancy that says **Major Item 55019-3220-94/0120 exceeds Overrun Limits**.
3. Click the **Remarks** button.
4. What is the reason for this Override?
   ____
5. Click the **Remarks** button.
6. Click the discrepancy that says **Major Item 55019-3220-94/0110 exceeds Overrun Limits**.
7. Click the **Remarks** button.
8. What is the reason for this Override?
   ____
9. Click the **Remarks** button.
10. Click the **Navigate** button.
11. Click **Yes** to the message. The **Estimate Item Detail** window displays the bid amount for each item on the estimate, as well as the amount paid for on this estimate. Review line items **0110** and **0120**.
12. Click the **Close** button.
13. Click the **Close** button.
14. Click the **Contractor Payments** folder.

Generating the Summary to Contractor Report

The Summary to Contractor report 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.

The report consists of two pages. The first page summarizes the Contract information. The second page lists the quantities and amounts of all the items for each project in the Contract.

Rpt-ID: RCPCSUM1	**Tennessee**	**Date:** 11/02/2006
User:	**Department of Transportation**	
	Estimate Summary to Contractor	
Vendor ID: 0000085434	**Vendor Name:** VOLUNTEER BRIDGE CONSTRUCTION, INC.	
Contract ID: CNB022Q	**Estimate Number: 0001**	**Pay Period:** 04/14/2005 **to:** 05/15/2005

INSIDE IF CONDITION

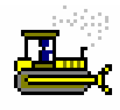
Contract Location:	**Time Allowed:**	0.0 days
Const. of Conc. I-Bm Br. on SR 224 over Lick Crk LM 1.47	**Time Charged:**	31.0 days
	Elapsed Calendar Days:	31.0 days
	Percent Time:	0.00 %
Contractor:		
VOLUNTEER BRIDGE CONSTRUCTION, INC.	**Date Let:**	02/01/2005
P O Box 627	**Date Awarded:**	02/28/2005
Decaturville, TN 38329	**Date Contract Executed:**	03/25/2005
Phone:	**Date Notice to Proceed:**	04/14/2005
	Date Work Began:	00/00/0000
	Date Time Stopped:	00/00/0000
	Date Accepted:	00/00/0000

Escrow Agent:
Surety Co:
Estimate Paid: NO

The Estimate Summary to Contractor Report
Figure 3-8

In TDOT, staff will review the Summary to Contractor report to ensure that the line item payment is correct. If changes are required, the Office Staff will follow the Estimate Correction Procedure.

The Summary to Contractor Report should be printed in Landscape with the smallest font size. Refer to the Review in this section for steps to modify the font and print preference.



Exercise 3-6

In the following exercise, you will generate the Summary to Contractor Report for Estimate 0002 for contract CNB022Q.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022Q**

1. On the **Contractor Payments** panel, double-click the **Process List** icon.
2. In the Process List, click the **Summary to Contractor**.
3. Click the **Run Process** button.

STOP. Do not submit the process in SiteManager Training.

4. Click the **Cancel** Button
5. Click the **Close** Button.

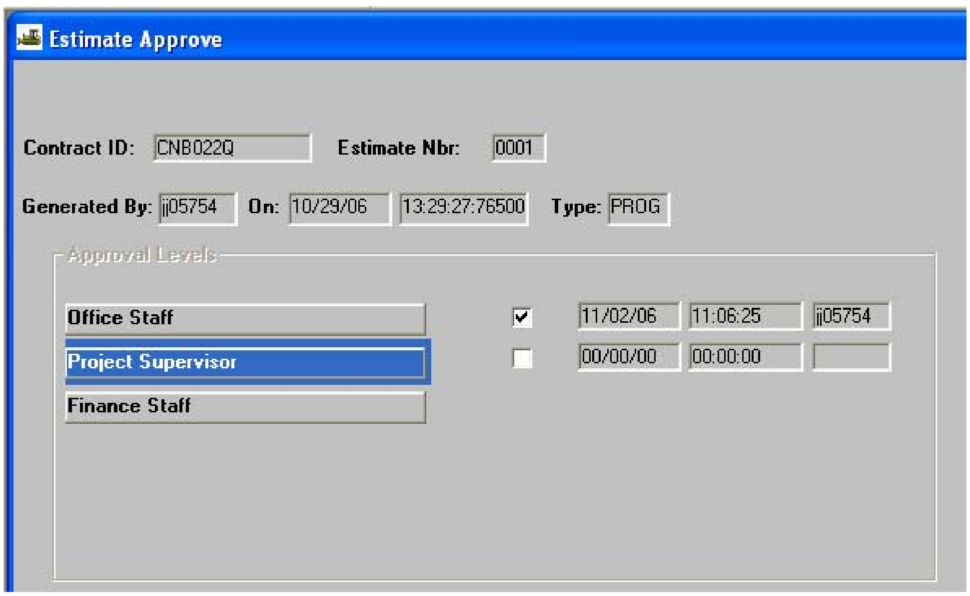
A copy of the report is saved at C:\SMTRAINS\SMFILES to view during training.

6. Right-click the **Start** button at the bottom left of the screen.
7. Click the **Explore** choice.
8. Navigate to the **C:\SMTRAINS\SMFILES** folder.
9. Double-click **Estimate Summary to Contractor CNB022P.htm.**
10. After viewing report, click the **Close** button to close the browser window.

Approving Estimates

The Estimate Approval window allows the authorized reviewers to approve all Estimate types—progress or final. The approval process provides an audit trail and prepares the Estimate for the creation of the extract file that can be 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. A User that belongs to an approval group can approve any level lower than their own approval level except for the first approval level. Once the last approval level has approved the Estimate, a generic file layout is created which contains all payment information required by the Tennessee Department of Transportation's financial system and available in SiteManager.



The Estimate Approval Window

Figure 3-9

TDOT Progress Estimate Review and Approve Workflow

The Office staff will complete the following tasks as part of the estimate generation and review process:

Estimate DWR Correction Workflow Tasks	Functional Navigation
1. 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
2. Office Staff / Lead Inspector will unauthorize the DWR(s) 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
3. 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
4. DWR Creator corrects the DWR.	Daily Work Reports > DWR
5. DWR Creator (Inspectors only) will pipeline the DWR to server mode after correcting the DWR	Pipeline > PM to Server
6. 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
7. Office Staff will generate the Estimate and repeat Progress Estimate Generation workflow.	Contractor Payments > Estimates > Generate Estimate

The TDOT Progress Estimate Review Process

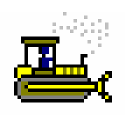
Table 3-2

In TDOT, progress estimates are approved by:

- **Office Staff**
- **Project Supervisor**
- **Finance Staff**

In TDOT, the final estimate and supplemental estimate are approved by the following personnel:

- **Office Staff**
- **Project Supervisor**
- **Regional Director Rep**
- **Finance Staff**
- **Director of Construction**



Exercise 3-7

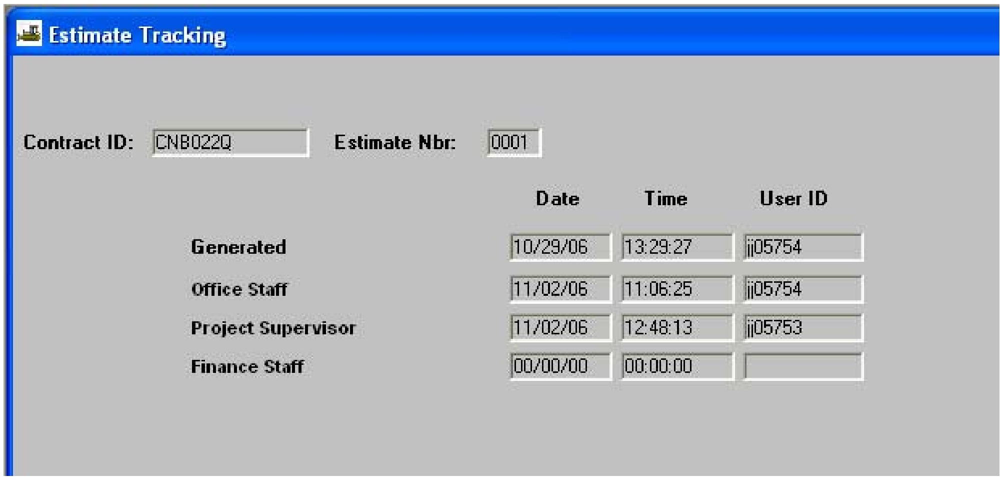
In the following exercise, you will approve Estimate 0001 for contract CNB022Q.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022Q**

1. On the **Contractor Payments** panel, double-click **Estimate** icon.
2. On the **Estimate** panel, double-click the **Estimate Approval** icon. SiteManager displays the Select Contract/Estimate list box.
3. In the **Contract** list box, scroll to and double-click the Contract **CNB022Q**.
4. Click the **Approved** check box (ON) for your level.
5. Click the **Save** button.
6. Click the **Close** button.
7. In the message, click the **OK** button.

Tracking Estimates

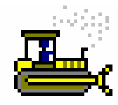
The Estimate Tracking window is a view-only window that allows the tracking of Estimate generation, approval, and rejection. A User can access the window to determine where the Estimate is in the approval process.



The Estimate Tracking Window

Figure 3-10

In TDOT, users may access this window to view the status of Estimates on the Contract.



Exercise 3-8

In the following exercise, you will track an Estimate.

User ID: **jj05753**   Group: **PJSUPS**   Contract: **CNB022Q**

1. On the **Estimate** panel, double-click the **Estimate Tracking** icon.
2. What date was the estimate generated? ______________________
3. Who generated the estimate? _______________________________
4. Click the **Close** button.

Review for Section 3

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.
3. Click the **Open** button.
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 the desired User ID.
6. On the **Date** list box, scroll to and double-click desired DWR Date.
7. Click **OK**.
8. Click the **Contractors** folder tab.
9. Select the desire Contractor to display Supervisors and Personnel Types.
10. Click the **Contractors Equip.** folder tab.
11. Select the desired Contractor to display Equipment.
12. Click the **Work Items** folder tab.
13. On the **Work Items** list box, scroll to and click the desired Work Item.
14. Click the **Record Work Items** button.
15. Click the **Select Work Items** button and repeat steps 11 and 12 until review of work items is complete.
16. Click the **Close** button.

To view Work Item Data in DWR Templates:

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. Click the **Open** button.
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 the desired User ID.
6. On the **Date** list box, scroll to and double-click desired DWR Date.
7. Click **OK**.
8. Click the **Work Items** folder tab.
9. On the **Work Items** list box, scroll to and click the desired Work Item.
10. Click the **Record Work Items** button.
11. To invoke the **DWR Template** window click on the **DWR Template** button.
12. 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.
13. Click the **Close** button to return to the **Record Work Item** window. The **Placed Qty** field is now populated with the value from the **DWR Template** and the **Templt Used** box is checked.

To view a Diary:

1. On the **Daily Work Reports** panel, double-click the **Diary** icon. *The Diary Authorize folder tab opens*.
2. Click the **Open** button.
3. In the **Contract** list box, scroll to and double-click the desired Contract.
4. In the **Diary** list box, scroll to and click the DWR Date of the Diary. (The DWR Date represents both the Daily Work Report Date and the Diary Date.)
5. Click **OK**. The Diary Authorize folder tab displays the Daily Work Reports submitted for this date.

To preview a Daily Work Report:

1. On the **Daily Work Reports** panel, double-click the **Diary** icon. *The Diary Authorize folder tab opens*.
2. Click the **Open** button.
3. In the **Contract** list box, scroll to and double-click the desired Contract.
4. In the **Diary** list box, scroll to and click the DWR Date of the Diary. (The DWR Date represents both the Daily Work Report Date and the Diary Date.)
5. Click **OK**. The Diary Authorize folder tab displays the Daily Work Reports submitted for this date.
6. In the **Inspector** list box, scroll to and click the Inspector who submitted the Daily Work Report to be previewed.
7. Click the **Preview DWR** button. A summary report of the selected Daily Work Report is displayed in a print preview window. The user can either review the information on-line or print it.
8. To close the print preview window, click the **Close** button.

To open the In-Box:

1. On the **Main Panel**, double-click the **Accessories** icon.
2. On the **Accessories** panel, double-click the **In-Box** icon.

To open a mail message:

1. Double-click the message.
2. When finished, click the **Close** button.

To open an Estimate summary:

1. On the **Contractor Payments** panel, double-click the **Estimate** icon.
2. Double-click the **Estimate Summary** icon.
3. Click the **Open** button.
4. In the **Contract** list box, scroll to and click the desired Contract.
5. Click **Ok**.
6. When through, click the **Close** button.

To open an Estimate discrepancy:

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon.
2. In the list box, scroll to and double-click the desired Contract.
3. In the list box, scroll to and click the desired Estimate.
4. Click **Ok**.

To generate the Summary to Contractor Report:

1. On the **Contractor Payments** panel, double-click the **Process List** icon.
2. In the Process List, click the **Summary to Contractor**.
3. Click the **Run Process** button.
4. Double-click the desired contract ID.
5. Double-click the desired estimate number.
6. Click the **Submit** button.
7. Click the **OK** button.
8. Click the **OK** button.
9. Click the **Services** menu.
10. Double-click the desired process name.
11. Double-click **Output.html**.
12. Click the **Page** button.
13. Click **Text Size**, and then click **Smallest**.
14. Click the **Page Setup** button.
15. Click the **Landscape** radio button.
16. Click the **Ok** button.
17. Once the report displays, close the browser window.
18. Click the **Close** button.

To approve an Estimate:

1. On the **Estimate** panel, double-click the **Estimate Approval** icon.
2. In the **Contract** list box, scroll to and double-click the desired Contract.
3. In the **Estimate** list box, scroll to and click the desired Estimate.
4. Click **OK**.
5. Click the **Approved** check box (ON) for your level.
6. Click **OK**.
7. Click the **Save** button.

Summary Exercise for Section 3

In the following exercise, you will perform the Estimate process activities for contract CNB022R.

User ID: **jj05753** Group: **PJSUPS** Contract: **CNB022R**

1. Navigate to the **Estimate Summary** window for **CNB022R**, Estimate 0003.
2. What are the Item Earnings for Estimate Nbr. **0003**? ________________________________
3. Are there discrepancies on Estimate Nbr. **0003**?____________________________________
4. Navigate to the **Estimate Discrepancy** window, and review the discrepancies associated with the estimate.
5. What are the two purposes of the Summary to Contractor Report?

   ____

6. Review the **Tracking** window for Contract **CNB022R**, Estimate Nbr **0003**.
7. Who is the next approver for this estimate?_______________________________________
8. Exit SiteManager.

Learning Module

Section 4 Change Order Basics
for Management Personnel

By the end of this module, you will be able to:

- Understand the Rules and Life Cycle of Change Orders
- View a Change Order Header
- View Change Order Time Adjustments
- View Modifications to Contract Items
- View the Custom Change Order
- View the Change Order Report
- Approve Change Orders
- Track Change Orders

May 2007

Change Order General Concepts

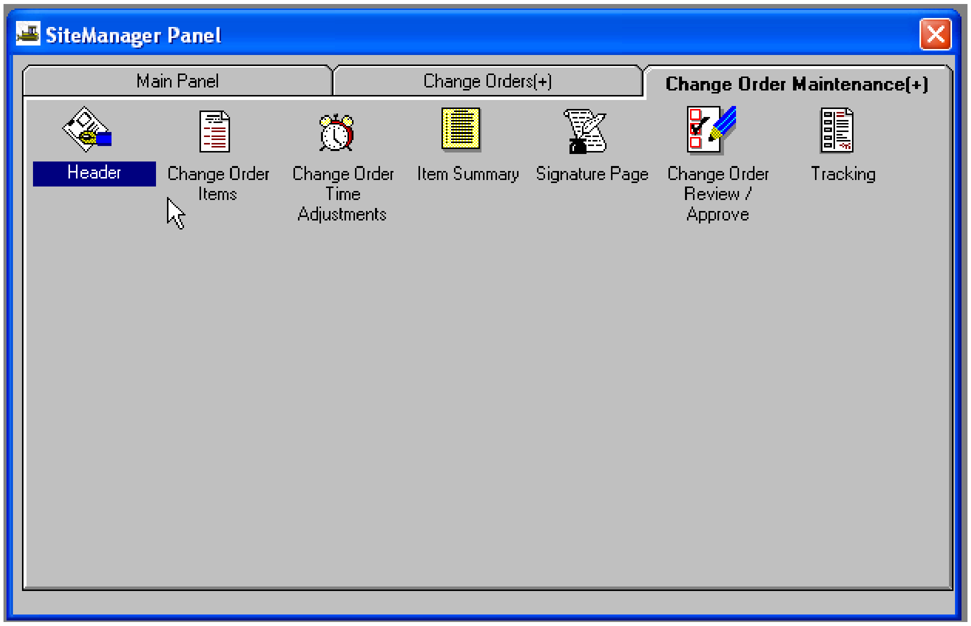
The change order process allows legal changes to be made to a Contract by creating, approving, and tracking changes.

Contract Change Orders may include:

- 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

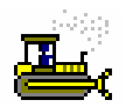
Except for zero dollar change orders, users can specify more than one function to make up a change order. Before a change order is saved, edits are performed to ensure that its components are reconciled with its selected functions. Messages advise the User if information has not been entered for a selected function.

Before the User can select a specific window in the Change Order (CO) function, a specific Contract must be selected from a pick list containing valid Contracts, and associated, existing COs. A specific Contract must be selected from the pick list to create a new change order.



The Change Order Maintenance Panel

Figure 4-1



Exercise 4-1

In the following exercise, you will first navigate to the In-box to view a Change Order message and then navigate to the Change Order Maintenance Panel.

User ID: **jj05756** Group: **RDIR** Contract: **CNB022I**

1. Double-click the **SiteManager Training** program icon on your desktop.
2. In the **User ID** field, type **jj05756**.
3. In the **Password** field, type **pass**.
4. Click the **Logon** button.
5. On the **Main Panel**, double-click the **Accessories** icon.
6. On the **Accessories** panel, double-click the **In-box** icon.
7. Double-click on the message from **08/01/06 21:00:03** where the subject is "**Change Order Approval Cycle**".
8. Click the **Close** button.
9. Click the **Close** button.
10. Click the **Main Panel** folder tab.
11. On the **Main Panel**, double-click the **Change Orders** icon.
12. On the **Change Orders** panel, double-click the **Change Order Maintenance** icon.

Change Order Life Cycle

The life cycle of contract change orders is reflected in the change order functions in SiteManager.

1. Creating a New Change Order

A CO can only be created by a User with specific authority to create new change orders. A change order must be associated with an existing active Contract. Specific information about the change order must be recorded using the Change Order Header window, the Change Order Items window, the Time Adjustments window, and/or the Change Order Explanations window.

2. Maintaining Change Orders

Once a CO has been created, updates to the CO information may be required. Change Order header information, items, time frames, and explanations may be modified in update mode on the appropriate windows.

3. Reviewing and Approving Change Orders

After it is created, a draft CO 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 CO 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 CO or approving a pending CO can record their decisions about proposed changes to the Contract on-line, using the Review/Approve window. Reviewers/Approvers receive an In-Box message from the author requesting an action, review or approval for the CO. 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 creator of the Change Order may choose to change the status of the Change Order to Draft in order to make modifications to the Change Order, 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 in the Header window. Once a Change Order is in Denied Status, it may not be modified or submitted for review/approval.

All change orders on a contract must be either Approved or Denied in order for the Physical Work Complete Date to be entered by Headquarters Finance, as part of the Contract completion process. (Change Orders may not be in a Draft or Pending status for the Contract completion process.)

4. Tracking the Change Order

At any time, the writer of the CO may view the status of a change order in the review or approval cycle by opening the Tracking window. The Tracking window for a CO is a view-only window and displays:

- The date a request for recommendation was sent to a reviewer or approver
- The reviewer or approver's name
- The action requested - review or approve
- The date the reviewer or approver makes a recommendation
- The recommendation - Approved or Denied
- Any Remarks the reviewer or approver has made

Authorized users may also display details about current and historic Contract items on-line using the Item Summary window.

5. Reports

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.

In TDOT, a paper copy of the change order is still required for physical signatures. SiteManager reflects electronic version.

When an approver physically signs the Change Order, that approver should also indicate their approval of the Change Order in SiteManager. The Headquarters Finance Office will indicate approval of the Change Order on behalf of all applicable Headquarters approvers.

Change Order Conditions

There are three conditions that affect how the Change Order process in SiteManager works. These are the:

- Type of Contract
- Function(s) associated with the change order
- Status of the change order

Change Order Functions

There are six types of change orders:

- Overrun/Underrun
- Extra Work
- Time Adjustment
- Zero Dollar
- Force Account – *TDOT will not use this function. Force Account COs are "Extra Work" in TDOT.*
- Final Quantity – *TDOT will not use this function. Final Quantity COs are "Overrun/Underrun" in TDOT.*

A change order may be a combination of types except for a Final Quantity CO, a singular change order required for contract completion, or a Zero Dollar.

Users define the purpose of the change order by selecting among the different functions. Except for Final Quantity and Zero Dollar, users can specify more than one function to make up a change order. The functions available on a change order are:

Overruns or Underruns: Used when the quantities associated with the 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 COs will require the "Extra Work" function to be selected.

Final Quantity: TDOT will not use this function. Final Quantity COs will require the "Overrun/Underrun" function to be selected.

Change Order Status

The CO Status field displays the current status of the change order in the creation, review, and approval process. The change order Status types are:

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.

Denied: A change order is changed to Denied status manually by the creator after the change order is denied by an approver in the *approval* process. The Denied status is not available until an approver has selected "denied" in the Changer Order Review/Approve window. When an approver selects "denied," the change order remains in Pending status for a user to take action to either change it back to Draft and make modifications to it, or to change the status to Denied causing it to become inquiry-only for the life of the contract. The user must change the status back to Draft or to Denied manually after the Change Order is denied or it will remain Pending.

A Denied change order in Pending status may have its status changed to back to Draft, 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 change order has been approved by its final approval level, it cannot be altered. Adjustments can only be made by creating a new change order.

All change orders must be in either Approved or Denied status for the contract completion process.

In TDOT, 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 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 the Header window.

BEWARE: A Change Order in Denied Status may not be changed to Draft.

The TDOT Change Order Process

In TDOT, all change orders will typically be created and maintained by the Office Staff. There are three phases in the TDOT CO Process. They are as follows:

Creation of a Change Order

- Prepare any applicable paperwork
- Create the change order on the Change Order Header window in SiteManager
- Add item adjustments and/or new items to the change order on the Change Order Items window in SiteManager
- Add time adjustments to the change order on the Change Order Time Adjustments window in SiteManager.
- Add explanations to the change order on the Change Order Explanations window

Maintaining & Reviewing a Change Order

- Forward the change order for parallel review
- Track the change order
- Revise the change order as necessary
- Generate applicable change order reports

Change Order Approval Process

- Change status to Pending
- Forward the change order for approval
- Track the change order
- Change the Status to Draft to revise the change order as necessary
- Generate applicable change order reports
- Change the Status to Denied if an approver selects Denied on the Change Order review/approve window, provides a remark indicating that the Change Order will never be approved, and provides a reason for the never approving it.

Viewing a Change Order Header

The Change Order Header window allows an authorized User to:

- Create a new change order by entering a 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.

The CO Type field has TDOT-defined change order types of:

- **Category 1**
- **Category 2**
- **Category 3**
- **Final Estimate**
- **Time Adjustments due to quantity increase**

As per Policy Number 355-01, change order categories are defined as follows:

Major Change - Category 1

A major change is defined as:

- **Any cumulative change to the working time/completion date of the contract in excess of 7.5% of the original contract time;**
- **Or any change/addition that alters the total original contract amount by more than $250,000.**

Intermediate Change - Category 2

An intermediate change is defined as:

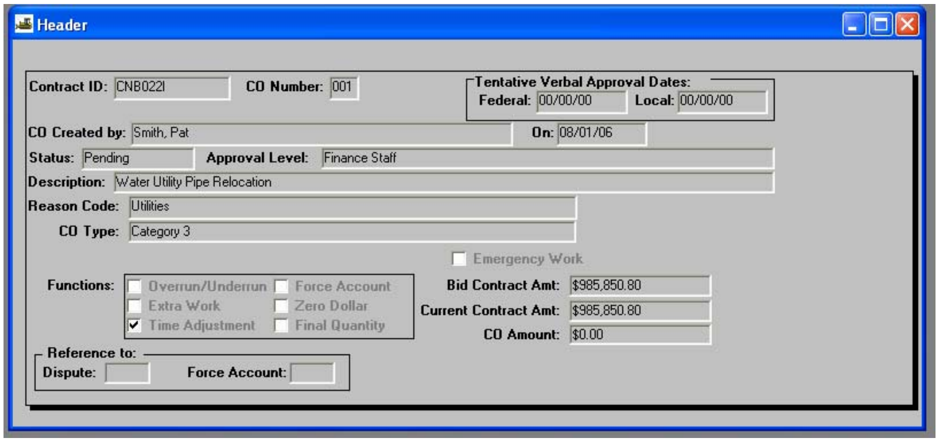
- **Any cumulative change to the working time/completion date of the contract not in excess of 7.5% of the original contract time;**
- **Any change/addition that alters the total original contract amount by more than $150,000 but less than or equal to $250,000;**
- **Any change/addition that alters the total original contract amount by more than ten percent (10%)of the original contract;**
- **Any change to a unit bid price:**
- **Or any change to a special provision or contract provision.**

Minor Change - Category 3

A minor change is defined as any changes/additions other than those specified under Major Change or Intermediate Change as shown above.

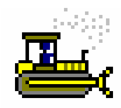
In TDOT, the Reason Code and CO Type fields are used to control the custom Change Order Report and Force Account Approval Form. All entries listed in the Reason Code picklist can be selected for Change Orders except for “Force Account.” This should only be selected when adding a Force Account item to the contract and must be selected in order to generate the Force Account Approval Form.

The appropriate Change Order Category (1, 2 or 3) must be selected in the CO Type field in order for the appropriate signatures to appear on the Change Order and Force Account Approval Form. The CO Type’s “Final Estimate” and “Time Adjustment Due to Quantity Increase” are used for special contract finalization processing and neither requires a signed Change Order (See Contract Finalization Section for details).



The Change Order Header Window

Figure 4-2



Exercise 4-2

In the following exercise, you will view Change Order 001 for Contract CNB022I.

User ID: **jj05756** Group: **RDIR** Contract: **CNB022I**

1. On the **Change Order Maintenance** panel, double-click the **Header** icon.
2. In the **Contract ID** list box, scroll to and double-click Contract **CNB022I**.
3. In the **Change Order list** box, scroll to and double-click Change Order **001**.
4. What is the description of this change order?
   ____
5. What is the dollar amount for this change order?________________________

Viewing Change Order Time Adjustments

The Time Adjustments window allows authorized Users to enter one or more time adjustments for a change order. At least one adjustment must be recorded using this window if the Time Adjustment function is selected on the change order. Time adjustments may be related to:

- The Contract completion date
- Milestone(s) on the Contract, or
- 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 Time Charges are:

Completion Date Charge Type: 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.

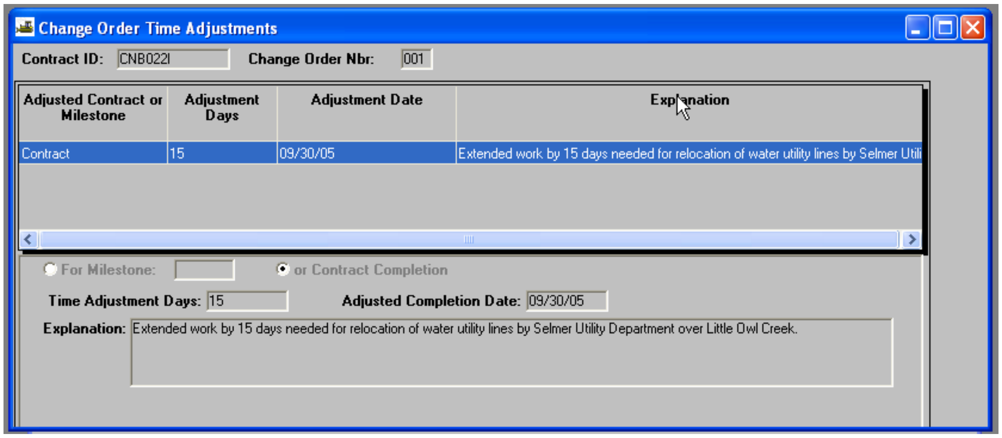
Available Days Charge Type: Only the number of days adjusted may be entered in the Time Adjustment Window.

Calendar Days Charge Type: 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 and milestones.

The Time Adjustments window has limits as follows:

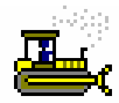
- Only one adjustment to the Contract completion date may be entered per change order.
- Only one adjustment to each Milestone completion date or number of days may be entered per change order. (Time Adjustment Change Orders for Milestones are only needed to accommodate changes to SP108B, such as phased construction and mowing and litter cycles, because they are contractual milestones. These would be Category 2 COs - modifications to Special Provisions.)
- Text explaining reasons for the time adjustment may 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 Change Order Time Adjustments Window

Figure 4-3

In TDOT, the Explanation in the Change Order Time Adjustments window should always be "See Change Order Explanations."



Exercise 4-3

In the following exercise, you will navigate to the CO Time Adjustment window from the Header window and view a time adjustment on Change Order 001 for Contract CNB022I.

User ID: **jj05756** Group: **RDIR** Contract: **CNB022I**

1. On the **Header** window, click the **Services** menu and click **CO Time Adjustments**.
2. How many days were added to the contract completion date?______________
3. What is the new contract completion date?_____________________________
4. Click the **Close** button on the toolbar.

Viewing Modifications to Contract Items

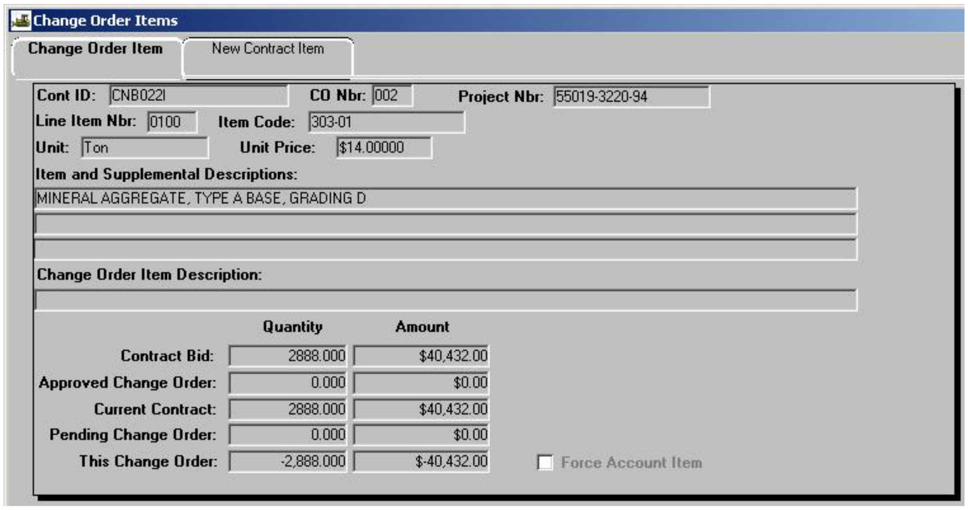
The Change Order Items window allows the User to:

- Select an existing item on the Contract for inclusion in the change order
- Add a new item to the Contract by including it in the change order
- Select and modify an existing item in the Contract already associated with the change order
- Delete an item from a change order

Whenever the change order function is an overrun/underrun and/or extra work, the Change Order Items window 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.

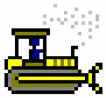
When modifying an existing Contract Item, select the Services menu "New CO Item" choice to bring up a list of existing contract items from which to select. The Quantity field may then be used to modify the item quantity.

When adding a new item to the Contract, select the "New Contract Item" folder tab to define the item. Then select the Change Order Item folder tab to define the item quantity in the Quantity field.



The Change Order Item Folder Tab

Figure 4-4



Exercise 4-4

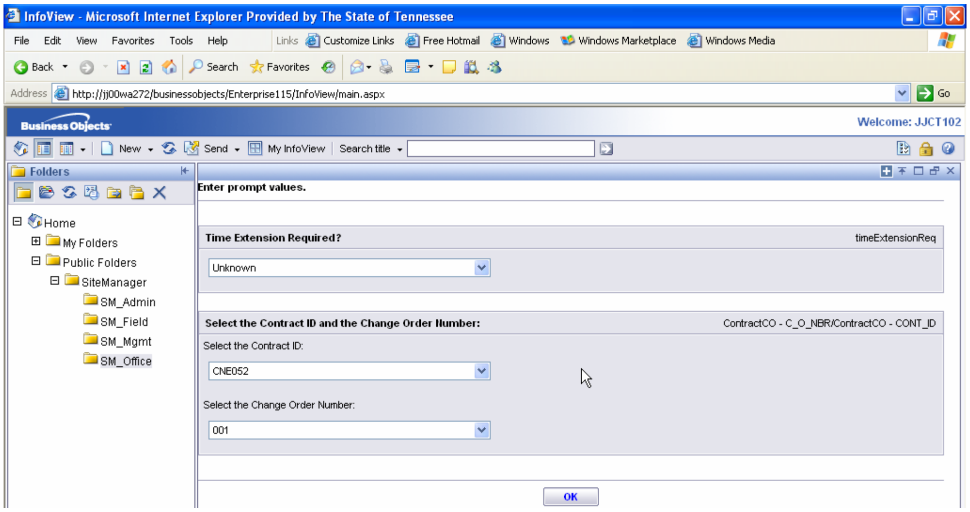
In the following exercise, you will view adjustments for two contract items for Change Order 002 for Contract CNB022I.

User ID: **jj05756** Group: **RDIR** Contract: **CNB022I**

1. On the **Header** window, click the **Open** button.
2. In the **Change Order** list box, double-click **002**.
3. Click the **Services** menu and click **CO Items**.
4. In the **Change Order Items** list box, double-click Item Nbr **0100**.
5. What is the adjustment to the item quantity for this change order? ________
6. Has this item been adjusted on any other change orders for this contract? ____
7. Click the **Open** button.
8. Click the **Change Order Items** selection button.
9. In the **Change Order Items** list box, double-click Item Nbr **9500**.
10. What is the adjustment to the item quantity for this change order?___________
11. Click the **Close** button.
12. Click the **Close** button.

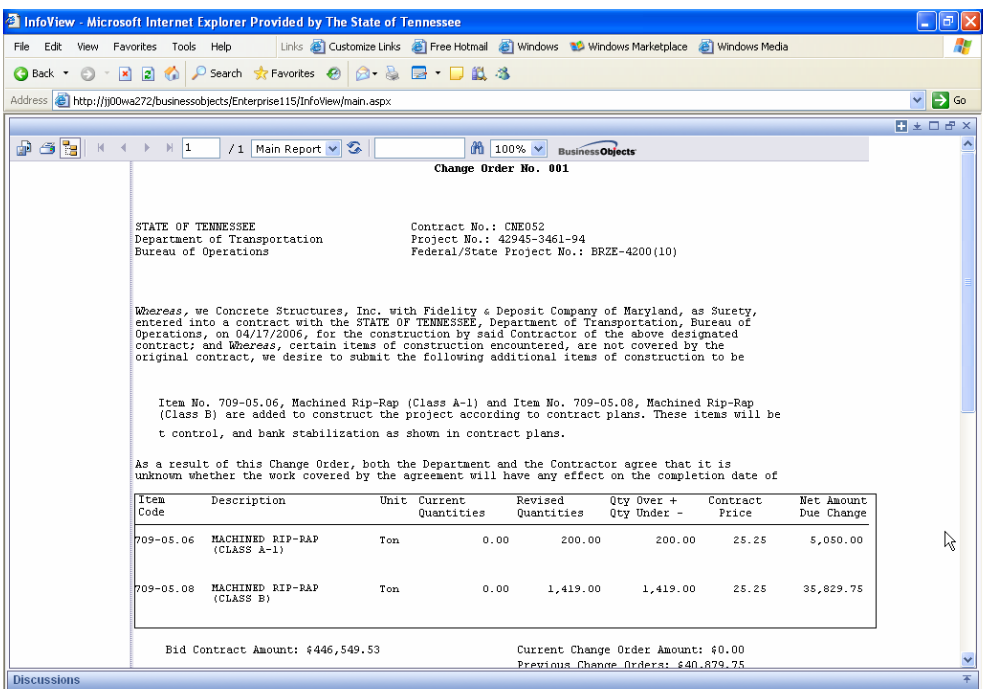
Viewing the Custom Change Order

The Custom Change Order is a custom TDOT document.



The Change Order Parameters Window

Figure 4-5



The Change Order Window

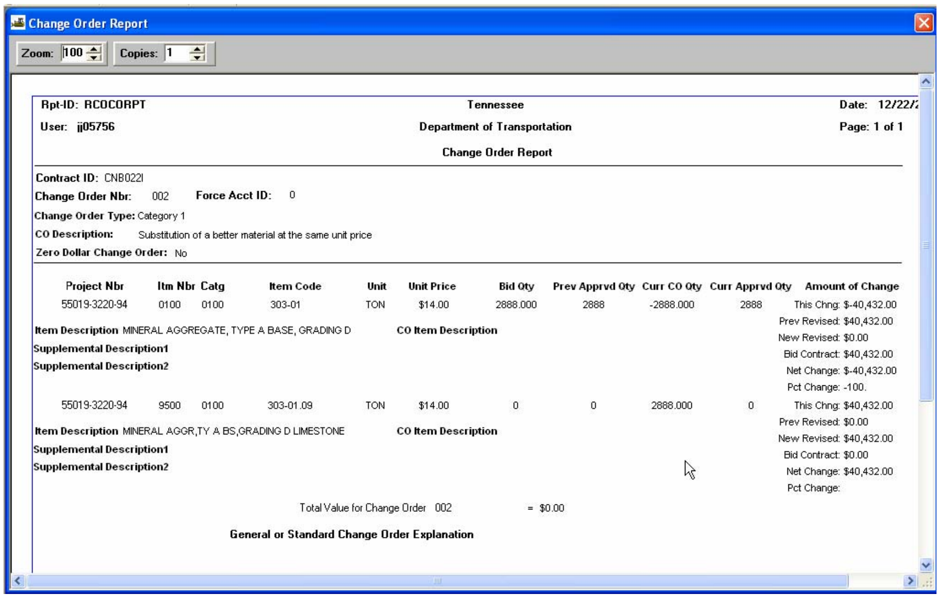
Figure 4-6

In TDOT, the custom Change Order will be used to gather signatures on a Change Order.

When an approver physically signs the Change Order, that approver should also indicate their approval of the Change Order in SiteManager. The Headquarters Finance Office will indicate approval of the Change Order on behalf of all applicable Headquarters approvers.

Viewing the Change Order Report

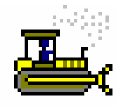
The Change Order Report window can be utilized as a source of information for the review and/or approver of a change order. This is a two-page report window that displays all other data included on a change order. The second page displays only if there are Time Extensions associated with the change order selected for this report.



The Change Order Report

Figure 4-7

The standard Change Order Report is available in Standalone mode.



Exercise 4-5

In the following exercise, you will access and view the Change Order Report for Change Order 002 for Contract CNB022I.

User ID: **jj05756** Group: **RDIR** Contract: **CNB022I**

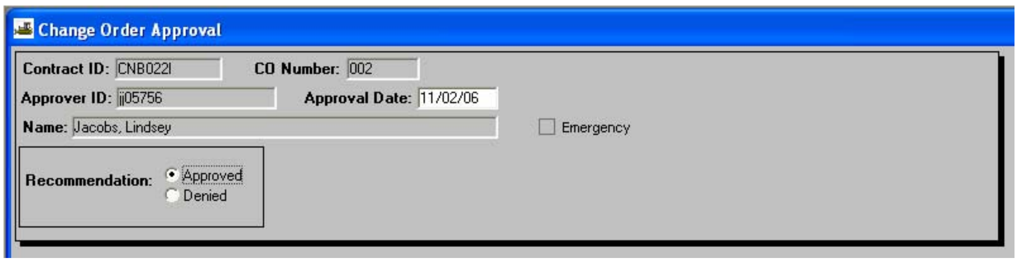
1. Click the **Change Orders** folder tab.
2. On the **Change Orders** panel, double-click the **Reports** icon.
3. Double-click the **Change Order Report** icon.
4. Using the *right* mouse button, click the **Change Order** field.
5. In the Object menu, click **Search**.
6. In the **Search** window, scroll to and click **002**.
7. Click **Ok** to generate the report.
8. What is the description for this change order?
   ____
9. What is the Total Value of Change Order 003?________________________
10. Click the **Close** button.

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.



The Change Order Approval Window

Figure 4-8

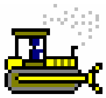
In TDOT, when a change order is denied by a user in the approval process, that user must indicate the reason for the denial in the Remarks field.

When an approver physically signs the custom Change Order document, that approver should also indicate their approval of the Change Order in SiteManager.

The Regional Secretary will enter the electronic signature for the Contractor when the physical signature is received.

Electronic approvals are not entered in SiteManager for the following groups who are responsible for physically signing the Custom Change Order Report:

- **Director of Construction**
- **Assistant Chief Engineer of Operations**
- **Commissioner**
- **FHWA – unless Federal Oversight contract**



Exercise 4-6

In the following exercise, you will approve Change Order 002 for Contract CNB022I.

User ID: **jj05756** Group: **RDIR** Contract: **CNB022I**

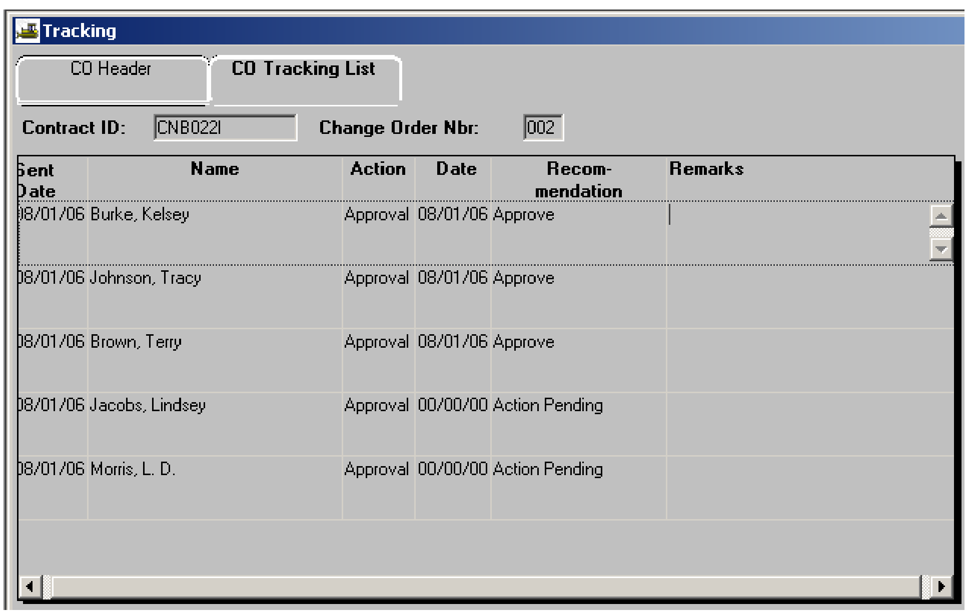
1. Click the **Change Order** folder tab.
2. On the **Change Order** panel, double-click the **Change Order Maintenance** icon.
3. On the **Change Order Maintenance** panel, double-click the **Change Order Review / Approve** icon.
4. In the **Contract ID** list box, double-click contract **CNB022I**.
5. In the **Change Orders** list box, double-click CO Nbr **002**.
6. On the **Change Order Approval** window, click the **Approved** radio button.
7. Click the **Save** button.
8. On the **Please Confirm Recommendation** message box, click the **Yes** button.
9. Click the **Ok** button.
10. Click the **Close** button.

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 CO is a view-only window and displays the following information:

- The date a request for recommendation was sent to a reviewer or approver
- The reviewer or approver's name
- The action requested - review or approve
- The date the reviewer or approver made a recommendation
- The recommendation - Approved or Denied
- Any Remarks the reviewer or approver has made

Authorized users may also view details about current and historic contract items on-line using the Item Summary window.



The Change Order Tracking Window

Figure 4-9

Exercise 4-7

In the following exercise, you will view the tracking window for Change Order 002 for Contract CNB022I.

User ID: **jj05756** Group: **RDIR** Contract: **CNB022I**

1. On the **Change Order Maintenance** panel, double-click the **Tracking** icon.
2. Click the **CO Tracking List** folder tab.
3. Who is the next person to approve the change order? ___________________
4. Click the **Close** button.

Review for Section 4

To access the Change Order Header window:

1. On the **Main** panel, double-click the **Change Order** icon.
2. On the **Change Order** panel, double-click the **Change Order Maintenance** icon.
3. On the **Change Order Maintenance** panel, double-click the **Header** icon.
4. In the **Contract** list box, scroll to and double-click the desired contract.
5. In the **Change Order** list box, scroll to and click the desired change order.
6. Click **Ok**.

To navigate to other CO functions from the Header Window:

1. Create a New Change Order Header or open an existing **Change Order Header**.
2. Click the Services menu and click the **CO Items**, **CO Time Adjustments**, or **Change Order Tracking** choice.

To view an existing time adjustment for a contract or milestone:

1. On the **Change Order Maintenance** panel, double-click the **CO Time Adjustment** icon.

Or

2. In the **Header** window with the correct Change Order open, click the **Services** menu and click the **CO Time Adjustment** choice.

To view a contract item on the change order:

1. On the **Change Order Maintenance** panel, double-click the **CO Items** icon.

Or

2. In the **Header** window with the correct Change Order open, click the **Services** menu and click the **CO Items** choice.
3. In the **Contract Items** list box, scroll to and click the desired Contract Item.
4. Click **Ok**.

To access the Change Order Report:

1. On the **Main Panel**, double-click the **Change Orders** icon.
2. On the **Change Orders** panel, double-click the **Change Order Reports** icon.
3. On the **Change Order Reports** panel, double-click the **Change Order Report** icon.
4. Search and select the contract.
5. Search and select the desired Change Order
6. Generate the report on the user's computer or select to generate and/or print off-line.
7. Click **OK**.

To review or approve a Change Order:

1. On the **Main** panel, double-click the **Change Order** icon.
2. On the **Change Order** panel, double-click the **Change Order Maintenance** icon.
3. On the **Change Order Maintenance** panel, double-click the Change **Order Review /Approval** icon.
4. Open a Draft Change Order that has been forwarded for review or a Pending Change Order that has been sent for approval.
5. Click the **Approved** or **Denied** radio button.
6. Click the **Save** button.
7. Enter **Remarks**.

To track the status of a change order:

1. On the **Main** panel, double-click the **Change Order** icon.
2. On the **Change Order** panel, double-click the **Change Order Maintenance** icon.
3. On the **Change Order Maintenance** panel, double-click the **Tracking** icon.
4. Open a Change Order.
5. When complete, click the **Close** button

Summary Exercise for Section 4

In the following exercise, you will reject a Change Order for Contract CNB022I.

User ID: **jj05756**   Group: **RDIR**   Contract: **CNB022I**

1. Navigate to the **Change Order Report** window.
2. Generate the Change Order Report for Contract **CNB022I**, Change Order **001**.
3. What is the **Change Order Type** for this Change Order?______________________________
4. Navigate to the **Change Order Review/Approve** window.
5. Deny Change Order **001** for Contract **CNB022I**. In the Remarks bubble, enter the reason for rejection as "**Change Order was rejected because the number of days needs to be further extended. Resubmit the change order with a completion date of 10/3/05**."
6. What Remark is indicated for the next approver? ____________________________________
7. Exit SiteManager.

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