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

AASHTOWare Project SiteManager™ 3.14a

January 2017
AASHTOWare Project SiteManager™
Training Guide for Field Staff at the
Tennessee Department of Transportation

AASHTOWare Project SiteManager™ 3.14a

January 2017
AASHTOWare is a registered trademark and service mark of AASHTO.

The AASHTOWare logo, Trns•port Estimator, the Trns•port Expedite, the Trns•port Expedite logo, AASHTO Trns•port, the AASHTO Trns•port logo, CES, the Trns•port CES logo, CAS, the Trns•port CAS logo, PES, the Trns•port PES logo, LAS, the Trns•port LAS logo, BAMS/DSS, the Trns•port BAMS/DSS logo, Trns•port SiteManager, the Trns•port SiteManager logo, SiteManager, Trns•port SiteXchange, the Trns•port SiteXchange logo, Trns•port FieldManager, the Trns•port FieldManager logo, Trns•port FieldBook, the Trns•port FieldBook logo, Trns•port FieldBuilder, the Trns•port FieldBuilder logo, Trns•port Preconstruction, the Trns•port Preconstruction logo, Trns•port CRLMS, the Trns•port CRLMS logo, AASHTOWare Project logo and AASHTOWare Project BAMS/DSS logo are registered trademarks of AASHTO.

AASHTOWare Project Bids, AASHTOWare Project Bids logo, AASHTOWare Project Civil Rights & Labor, AASHTOWare Project Civil Rights & Labor logo, AASHTOWare Project Construction Administration, AASHTOWare Project Construction Administration logo, AASHTOWare Project Construction & Materials, AASHTOWare Project Construction & Materials logo, AASHTOWare Project Decision Support, AASHTOWare Project Decision Support logo, AASHTOWare Project Payroll XML Resource Kit, AASHTOWare Project Payroll Spreadsheet and Conversion Utility, AASHTOWare Project Payroll Spreadsheet and Conversion Utility logo, AASHTOWare Project Estimator, AASHTOWare Project Estimation, AASHTOWare Project Estimation logo, AASHTOWare Project Estimator logo, AASHTOWare Project Expedite, AASHTOWare Project Expedite logo, AASHTOWare Project FieldBook, AASHTOWare Project FieldBook logo, AASHTOWare Project FieldBuilder, AASHTOWare Project FieldBuilder logo, AASHTOWare Project FieldManager, AASHTOWare Project FieldManager logo, AASHTOWare Project FieldNet, AASHTOWare Project FieldNet logo, AASHTOWare Project, AASHTOWare Project logo, AASHTOWare Project Preconstruction, AASHTOWare Project Preconstruction logo, AASHTOWare Project Worksheet, AASHTOWare Project Worksheet logo, AASHTOWare Project SiteManager, AASHTOWare Project SiteManager logo, AASHTOWare Project SiteXchange, AASHTOWare Project SiteXchange logo, AASHTOWare Project TRACER, and AASHTOWare Project TRACER logo are trademarks of AASHTO.

AASHTO Trns•port, Trns•port CES, Trns•port PES, Trns•port Expedite, Trns•port LAS, Trns•port CAS, Trns•port SiteManager, Trns•port BAMS/DSS, Trns•port SiteXchange, Trns•port Preconstruction, Trns•port CRLMS, AASHTOWare Project BAMS/DSS, AASHTOWare, AASHTOWare Project Bids, AASHTOWare Project Civil Rights & Labor, AASHTOWare Project Construction Administration, AASHTOWare Project Construction & Materials, AASHTOWare Project Cost Estimation, AASHTOWare Project Decision Support, AASHTOWare Project Estimation, AASHTOWare Project Expedite, AASHTOWare Project Preconstruction, AASHTOWare Project, AASHTOWare Project SiteManager, AASHTOWare Project Worksheet, AASHTOWare Project Payroll Spreadsheet & Conversion Utility, AASHTOWare Project Payroll XML Resource Kit, and AASHTOWare Project SiteXchange are proprietary software products of AASHTO.

FieldManager represents a registered trademark and proprietary product jointly owned by Info Tech, Inc., and the State of Michigan.

FieldBook and FieldBuilder represent trademarks and proprietary products jointly owned by Info Tech, Inc., and the State of Michigan.

Estimator, FieldNet, Field Interviewer, and SYNC are trademarks and proprietary products of Info Tech, Inc.

Mobile Inspector is a registered trademark and a proprietary product of Info Tech, Inc.

Other product names are trademarks or registered trademarks of their respective owners.

© Copyright 2017 by the American Association of State Highway and Transportation Officials, Inc. All rights reserved. This document or parts thereof may not be reproduced in any form without written permission of the publisher. Printed in the United States of America.
Getting Started

In this chapter, receive instruction about the following:

- Understanding the General Workflow 2
- Using this Guide 3
- Understanding SiteManager and LIMS 4
- Accessing Support Resources 4
- Starting SiteManager 5
- Logging On and Changing Your Password 6
- Understanding the Main Functions of SiteManager 12
- Navigating with the SiteManager Panel 13
- Understanding the SiteManager Toolbar 16
- Reading the SiteManager Status Bar 17
- Understanding SiteManager Menus 17
- Opening Multiple SiteManager Windows 19
- Controlling the Display of Multiple Windows 19
- Closing Versus Exiting 21
- Summary 23
Understanding the General Workflow

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

Figure 1. General Workflow
Using this Guide

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

Objectives

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

Topics

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

Instructor-Led Exercises

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

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

Exercise 2

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

Summary

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

Review Exercise

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

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

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

Accessing Support Resources

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

Training Guides and Training Application

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

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

Generic References

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

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

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

![SiteManager Icon](image)

Figure 3. Desktop Icon

Exercise 1

In this exercise, learn how to start SiteManager.

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

   *You’ve started SiteManager.*
Logging On and Changing Your Password

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

![SiteManager Logon Window](image)

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

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

Understanding Passwords

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

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

Remember these important tips regarding your SiteManager password:

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

Changing Passwords

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

Figure 5. Change Password Window
Understanding Security Groups

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

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

![Available Groups for j00020](image)

**Figure 6. Available Groups For < > Window**

Depending on your SiteManager security privileges, users may have:

- Update rights to all SiteManager windows and data
- Inquiry rights only and be able to access data and print reports, but not update information
- Update rights on some SiteManager windows, inquiry only on other windows, and/or no access to other windows
- Update rights on some SiteManager data, inquiry rights on other data, and/or no access to other data
- Access to SiteManager in only a network mode
- Access to SiteManager in both standalone and network mode
Figure 7. Example of a Window in Inquiry-Only Mode

When users have access to both the window and the data, the field appears with a white background. When users only have inquiry access, the data appear but the fields have a gray background.
Exercise 2

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>IMPORTANT TIPS REGARDING YOUR USER ID:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. WHEN A USER ID IS FIRST ASSIGNED TO A USER, THE DEFAULT PASSWORD IS &quot;PASSWORD&quot; (ALL CAPS). THE USER MUST CHANGE THE PASSWORD BEFORE LOGGING ON TO SITEMANAGER.</td>
</tr>
<tr>
<td>2. SITEMANAGER USER IDS FOR TDOT CRITERIA:</td>
</tr>
<tr>
<td>• SEVEN CHARACTERS IN LENGTH.</td>
</tr>
<tr>
<td>• THE FIRST TWO CHARACTERS WILL BE JJ (IN LOWERCASE), FOLLOWED BY A RANDOMLY ASSIGNED 5-DIGIT NUMBER.</td>
</tr>
</tbody>
</table>

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

EVERYTHING IS TRACKED BY ID! IN A COURT OF LAW, GREAT IMPORTANCE IS PLACED ON SHOWING AN UNBROKEN CHAIN OF CUSTODY.
Understanding the Main Functions of SiteManager

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

Figure 8. SiteManager Panel Window - Main Panel

NOTE

AVAILABLE ICONS ARE SPECIFIC TO THE SECURITY GROUP.
Navigating with the SiteManager Panel

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

![SiteManager Panel Window](image)

Figure 9. Navigating in SiteManager

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

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

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

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

FORMAT: CN<Y><###>

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

Y - LETTING YEAR, WHERE

2002=A
2013=M
2014=N
2015=P

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

### - SEQUENTIAL NUMBER THAT STARTS OVER EACH LETTING YEAR

EXAMPLE: TRN349 = CONTRACT 349 FROM 2014 LETTING.

TRAINING CONTRACTS REPRESENT "SNAPSHOTS" OF A REAL CONTRACT IN VARIOUS STAGES OF THE LIFECYCLE.
Exercise 3

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

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

1. On the Main Panel panel, double-click the Contract Administration icon. The system displays a second-level panel.

2. Double-click the Contractor Management icon. The system displays a third-level panel. View the icons available from the Contractor Management panel.

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

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

5. To go up a level, click the Main Panel tab.

6. Double-click the Contractor Payments icon. View the icons available.

7. To go down a level to view the icons available from the Estimate panel, double-click the Estimate icon.

Open a window from the Contract Records panel.

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


10. Double-click the Contract Records icon. View the icons available.

11. Double-click the Contracts icon. SiteManager displays the Select Contract window.

12. In the Select Contract window, double-click TRN349 SiteManager displays the Contracts window.

You’ve navigated SiteManager’s panels and opened a window.
Understanding the SiteManager Toolbar

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

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

Exercise 4

In this exercise, identify the buttons on the toolbar.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00020</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Training Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - District Operations Supervisor [PJSUPS]</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Place your cursor over a button on the toolbar. SiteManager displays the name of the button.

2. Move your cursor to another button.

3. Repeat Steps 1 and 2 until you have reviewed all the buttons on the toolbar.

4. Click the SiteManager Panel button. The system displays the SiteManager Panel.

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

5. On the SiteManager Panel window, click Close.

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

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

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

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

Figure 11. SiteManager Status Bar

Understanding SiteManager Menus

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

The following guidelines apply to SiteManager menus:

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

Figure 12. SiteManager Menus - File, Services and Help

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

NOTE
SERVICES | ATTACHMENTS IS AN EXAMPLE OF A CASCADING SUBMENU.
CLICK FILE MENU TO SHOW A FEW SHORTCUTS.
Exercise 5

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

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

Explore the Services menu.

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

Explore the Help menu.

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

Explore the File menu.

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

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

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

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

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

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

Controlling the Display of Multiple Windows

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

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

Using Tile

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

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

Figure 13. Two Windows Tiled
Exercise 6

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

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

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

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

3. In the **Project Number** area, in the **PCN** column, scroll to and double-click **67004-3213-14**. SiteManager displays the Projects window.

4. On the **Window** menu, select the **Tile** choice. SiteManager displays both open windows side-by-side.

*You’ve tiled open windows.*

**Using Cascade**

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

**Using Layer**

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

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

Closing

Close a window in the following ways:

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

Exiting

Exit an application in the following ways:

- In SiteManager, click the Exit SiteManager button on the toolbar. In SiteManager LIMS, click the Exit SiteManager LIMS button on the toolbar, then at the prompt, click the Yes button to confirm your decision.
- In SiteManager, select the Exit choice on the File menu. In SiteManager LIMS, select the Exit Application choice on the File menu, then at the prompt, click the Yes button to confirm your decision.
- In both SiteManager and SiteManager LIMS, click the Exit button on the right side of the application’s title bar.
Exercise 7

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

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

1. On the toolbar, click the **Close** button. SiteManager closes the active window.

2. On the **File** menu, select the **Exit** choice.

*You’ve closed a window and exited the application.*
Summary

To start SiteManager:

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

To log on to SiteManager:

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

To change your password:

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

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

To open a window:

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

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

1. Click the desired level’s tab.

To open the SiteManager Panel:

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

   or

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

To open more than one window:

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

To tile windows:

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

To cascade windows:

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

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

To layer windows:

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

To navigate between layered windows:

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

To close a window:

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

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

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

To exit SiteManager:

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

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

1. On the application’s title bar, click the **Exit** button.
To exit SiteManager LIMS:

1. On the toolbar, click the **Exit SiteManager LIMS** button.
2. At the prompt, click **Yes**.
   
or
1. Click the **File** menu.
2. Click the **Exit Application** choice.
3. At the prompt, click **Yes**.
   
or
1. On the application’s title bar, click the **Exit** button.
Common Functionality

In this chapter, receive instruction about the following:

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

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

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

Understanding Keys

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

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

Exercise 1

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

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

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

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

Open the Daily Work Reports window.

3. On the Main Panel panel, double-click the Daily Work Reports icon.

4. On the Daily Work Reports panel, double-click the Daily Work Reports icon.

5. Is this inquiry or update access? __________

6. Which contract ID is displayed? __________
Open an existing record.

7. On the toolbar, click the **Open** button.

8. In the **Contract** area, in the **Contract ID** column, scroll to and double-click **TRN349**.

9. In the **Inspector** area, in the **User ID** column, scroll to and double-click **jj00001**.

10. In the **Date** area, in the **DWR Date** column, scroll to and double-click **09/24/14**. The system displays a message with information that the DWR will be read-only.

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

12. When you want to open an existing record, do you use Open, New, or Choose Keys? _______

You’ve opened an existing record.

**Note:** DWRs are read-only when authorized and for every user except the creator when un-authorized.
Creating New Records with Current Keys

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

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

Exercise 2

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

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

1. On the toolbar, click the New button. The system is ready to create a record for the current contract.

2. What is the inspector’s name? ____________________

3. What is the DWR date? ________________________

4. What is the contract? ___________________________  

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

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

You’ve created a new record with the current keys.
Creating New Records by Choosing Keys

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

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

Exercise 3

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

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

1. Click the Services menu.

2. Click the Choose Keys choice. SiteManager displays the Contract ID window.

3. In the Contract ID area, scroll to and select TRN350.

4. Click OK. The system is ready to create a record for the new contract.

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

6. Click Close. The system displays a message prompting to save changes.

7. In the message, click No.

8. Click the Main Panel tab.

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

NOTE
KEY FOR THIS EXERCISE IS THE CONTRACT.
OPEN ➔ EXISTING RECORDS
NEW ➔ NEW RECORD ON SAME CONTRACT (KEY)
CHOOSE KEYS ➔ NEW RECORD ON A DIFFERENT CONTRACT (KEY)

NOTE
THE CHOOSE KEYS CHOICE IS NOT AVAILABLE UNLESS ON A NEW RECORD.
Searching, Filtering, and Sorting

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

Understanding Search and Filter Search

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

Understanding Sort and Filter

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

![Figure 1. ‘Sort Criteria – New Sort’ Window](image)
Understanding Criteria Window Conditions, Values and Joins

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

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

When using the % variable, know the following:

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

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

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

When creating multiple conditions, know the following:

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

**NOTE**

UNSAVED FILTERS REMAIN ACTIVE UNTIL THE USER EXITS THE SYSTEM.

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

Exercise 4

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

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

1. On the **Main Panel**, double-click the **Daily Work Reports** icon. The system displays the **Daily Work Reports** panel.

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

3. On the toolbar, click **Open**. The system prompts you to save changes.

4. In the message, click **No**.

5. In the **Contract ID** area, double-click **TRN349**.

6. In the **Inspector** area, double-click **jj00001, Bailey Morgan**.

7. In the **DWR Date** area, scroll to and double-click **09/24/14**. The system informs you that the record will be read-only.

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

9. Click the **Work Items** tab.

Use the column headings to sort the list.

10. Click the **Description** column heading.

11. Click the **Item Code** column heading.
Use the sort available from the right-click menu.

12. Right-click on the first record.

13. On the menu, click **Sort**.

14. In the **Sort Criteria** window, click **Add**.

15. In the **Field** dropdown list, select the **“InstId”** choice.

16. In the **Order** dropdown list, select **Descending**.

17. Click **Add** again.

18. In the **Field** dropdown list, select the **“Item Code”** choice.

19. Click **OK**.

*You’ve sorted the records using two different functions.*
Finding Records

Figure 2. ‘Find Criteria’ Window

Exercise 5

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

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

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

You’ve found the record that meets the specified conditions.
Filtering Records

![Filter Criteria – New Filter Window](image)

**Figure 3. ‘Filter Criteria – New Filter’ Window**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insert</td>
<td>Inserts blank row before the currently selected row.</td>
</tr>
<tr>
<td>Add</td>
<td>Inserts blank row after the last row.</td>
</tr>
<tr>
<td>Remove</td>
<td>Deletes selected row. Works on only one row at a time.</td>
</tr>
<tr>
<td>Clear</td>
<td>Deletes all rows to return to the complete unfiltered list.</td>
</tr>
<tr>
<td>Test</td>
<td>Displays a message with information about the number of rows this filter will return.</td>
</tr>
<tr>
<td>Load</td>
<td>Opens saved filter and allows for loading and deleting of saved (and default) filters.</td>
</tr>
<tr>
<td>Save</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Figure 4. ‘Filter Criteria – New Filter’ Window – Buttons**

**WARNING!** CLICK CLEAR ONLY TO REMOVE ALL ROWS ON A FILTER AND RETURN TO AN UNFILTERED LIST. CLICK REMOVE TO DELETE A SINGLE ROW.
Exercise 6

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

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

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

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

Exercise 7

In this exercise, clear the current filter.

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

1. Right-click on the first record.

2. On the menu, click **Filter**. The system displays the Filter Criteria window.

3. In the Filter Criteria – New Filter window, click **Clear**. The system removes all rows from the filter.

4. Click **OK**. The system displays a message to inform that the specified filter will return a number of rows.

5. In the message, click **OK**. The system displays a message to inform you that the maximum number of rows has been exceeded and to prompt you to retrieve the results.

6. In the message, click **Yes**. The system displays the unfiltered results in the Work Items window.

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

8. Click the **Main Panel** tab.

You’ve cleared the filter and returned an unfiltered list of records.
Using the Quick Sort

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

![Select < > Window (with Quick Sort)](image)

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

Exercise 8

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

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

1. On the Main Panel panel, double-click the Contract Administration icon. The system displays the Contract Administration panel.

2. Double-click the Contract Records icon. SiteManager displays the Contract Records panel.

3. Double-click the Items icon. SiteManager displays the Select Contract Item window.

   **Note:** The previously selected contract is still active.

4. In the Project area, in the PCN column, double-click 67004-3213-14.

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

6. In the Item Code column, double-click 201-01 for category number 0100. The system displays the Items window.

   *You’ve sorted the list of contract items to locate a specific item more easily.*
Using the Quick Find

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

![Select < > Window (with Quick Find)](image)

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

Exercise 9

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

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

1. On the toolbar, click the Open button. SiteManager displays the Select Contract Item window.

2. To sort the column and activate the Find feature, click the Item Code column heading.

3. In the Find field, type 611-07. The system selects the first item containing that string of characters.

4. Select the row for item 611-07.02.

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

5. Click the OK button. SiteManager displays the Items window.

6. To close the Items window, on the toolbar, click the Close button.

You’ve used the quick find feature to quickly locate a specific contract item.
Reporting from SiteManager

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

Figure 7. Installed Work Report

Generating Standard System Reports

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

Contract Administration

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

Contractor Payments

- Installed Work
- Work Suspend/Resume Times
Change Orders

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

Mix Design

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

Approved Lists

- Calibrated Equipment Report
- Qualified Labs Report

Exercise 10

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

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

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

2. Double-click the **Contractor Payments** icon. The system displays the Contractor Payments panel.

TIP!

SAVE A COPY OF A STANDARD REPORT THAT UPDATES IN REAL TIME. A SAVED REPORT MAY SERVE AS A REFERENCE OF THE DATA WHEN ADDRESSING QUESTIONS.
3. Double-click the Reports icon. The system displays the Reports panel.


5. In the list box, scroll to and double-click the TRN349 choice.

6. Review the report.

Save the report to your computer.

7. Click the Save button. The system displays the Save Report To window.

8. Browse to the C:\SMTRAINS directory.

9. Double-click the SMFILES folder.

10. In the File Name field, type INWK_TRN349_20141111.

11. Click the Save button. The system displays a message with information about the location of the exported file.

12. Click the OK button.

13. To close the Installed Work window, click the Close button.

View the report saved to your computer.

14. On the Reports panel, double-click the View Saved Reports (PSR) icon. The system displays the Select PSR File window.

15. Double-click the INWK_TRN349_20141111.PSR file. SiteManager displays the View Saved Reports (PSR) window.

Prepare for the next exercise.

16. Click the Close button.

17. Click the Main Panel tab. The system displays the Main Panel panel.

You’ve run a standard report, saved a copy, and accessed the saved report.
System Attachments

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

Figure 8. System Attachments Window

Figure 9. CMS File Management System

URL LINKS ARE INCLUDED AS SYSTEM ATTACHMENTS.

THE CMS CONTRACT FILE MANAGEMENT ATTACHMENT WILL OPEN THE FILE MANAGEMENT SYSTEM.

THE URL THIS ATTACHMENT OPENS IS \JJ01SDCWA00031.NET.ADS.STATE.TN.US\CMS.
Exercise 11

In this exercise, view system attachments.

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

1. On the Main Panel, double-click the Accessories icon. The system displays the Accessories panel.

2. Double-click the System Attachments icon.

3. In the System Attachments window, in the Description column, double-click CMS Contract File Management.

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

4. Close the resulting browser window.

5. Close. The system closes the System Attachments window.

6. Click the Main Panel tab.

7. From the File menu, select Exit.

You’ve viewed a system attachment.
Generating Custom Reports

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

ACCESS THE CUSTOM REPORTS USING ANY OF THE FOLLOWING WAYS:

FROM THE INTRANET:

TRANSPORTAL > BUSINESS APPLICATIONS > BUSINESS OBJECTS ENTERPRISE

FROM SITEMANAGER:

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

FROM BROWSER:

HTTP://BOE.TDOT.TN.GOV/INFOVIEWAPP/

Exercise 12

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

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

1. Open Internet Explorer.


Figure 10.  transPORTAL Intranet Site – Home Page
3. From the **Business Applications** menu, select **Business Objects Enterprise**.

**Note:** This is also known as production BOE.

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

![BusinessObjects Intranet Page (Production)](image)

Figure 11. BusinessObjects Intranet Page (Production)

5. Click the **Document List** button.

![Document List Button (detail)](image)

Figure 12. Document List Button (detail)

6. In the left pane, click **Public Folders**. The system displays the subfolders in the right pane.

7. Double-click the **SiteManager** folder.

8. Double-click the **SM Operations** folder.

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

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

11. When the prompt page displays, start at the top to make selections from all the required prompts and any optional prompts depending upon what you need to see in the report.
Figure 13. DWR Template Report - Prompts Page (Part 1 of 2)

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

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

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

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

- **Enter End Date:**
  Required.

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

Export the report.

**Tip!** If you do not export the report, use the **Page** buttons on the toolbar to view it in BOE, but this can be much slower.
13. In the upper left corner, click the **Export** button. The system displays the Export window.

![Export Window](image)

**Figure 15. BusinessObjects - Export Window**

14. In the File Format dropdown list, select the desired format (usually PDF).

15. Click **Export**. The system prompts to open or save the exported file.

![Custom Report](image)

**Figure 16. Custom Report – First Page**

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

To open an existing record:

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

To create a new record with current keys:

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

To create a new record with new keys:

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

To perform a quick sort:

1. Click the column heading.

To sort with specified criteria:

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

   **Note:** Repeat the previous three steps as needed.
6. Click **OK**.
To find with specified criteria:

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

To perform a quick find:

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

To search:

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

To filter search:

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

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

To clear filters:

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

To remove a default filter:

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

To print a displayed report:

1. In the Copies field, type the desired number of copies to print.
2. From the File menu, select Print.
To export a standard report to view outside of SiteManager:

1. Display the desired report.
   
   **Note:** The system cannot export saved reports.

2. From the Services menu, click Export. The system displays the Export File To window.

3. In the **File Name** field, type the desired file name.

4. In the **Save as type** dropdown list, select the desired type of file.

5. **Save**.

To save a standard report to view later with SiteManager:

1. **Save**.

2. Change the drive and directory as desired.

3. In the **File Name** field, type the name for the file.

   **Note:** The file has a .PSR extension.

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

5. Click the **OK** button.

To open a saved standard report:

1. On the Reports panel, double-click the **View Saved Reports (PSR)** icon. The system displays the Select PSR File window.

2. Change the drive and directory as needed to select the desired .PSR file.

3. Click the **OK** button.

To generate a custom report from BOE:

1. Open the Internet Explorer browser.


3. From the Business Applications menu, select Business Objects Enterprise.
4. Log on with <your jj number (user ID) and password> while connected to TDOT’s network. If you provided credentials previously, the site may automatically connect. The site displays the Home page.

5. Click the Document List button.

6. In the left pane, click Public Folders. The system displays the subfolders in the right pane.

7. Double-click the SiteManager folder.

8. Double-click the <name of the desired report>. The system may display a message to inform that the document is being processed.

9. When the prompt page displays, start at the top to make selections from all the required prompts and any optional prompts depending upon what you need to see in the report.

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

   - In the Available Values pane, click to select the desired value, then click the single arrow (>) button to move selections to the Selected Values pane.

   - Click the double arrows (>>) button to move all values from the Available Values pane to the Selected Values pane.

   - In the Selected Values pane, click to select the desired value, then click the Remove button to move selections to the Available Values pane.

   - Click the Remove All button to move all selections from the Selected Values pane to the Available Values pane.

   - In a text or date field, type the desired value.

   - In a dropdown list, select the desired value.

10. Click OK. The system generates the report.
Administering Contracts for Field Documentation

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

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

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

TO BEGIN TRACKING THE PROGRESS OF CONTRACT WORK IN SITEMANAGER, THE HEADQUARTERS FINANCE OFFICE WILL CHANGE THE CONTRACT’S STATUS TO ACTIVE.
Exercise 1

In this exercise, navigate to the Contracts window.

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

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

*You’ve accessed the Contracts window.*
Viewing Contracts

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

Contract Time Charges

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

- **Completion Date** - Most contracts at TDOT will be set up as Completion Date contracts. This includes bridge, grade and drain, maintenance, and some resurfacing contracts. Time cannot be suspended on Completion Date contracts.

- **Calendar Day** – Used for TDOT’s resurfacing contracts with a set number of bid days (completion date contracts with a working window). Time is started when the Notice to Proceed date is entered. Time cannot be suspended on calendar day contracts.

- **Working Days (Available Days)** - TDOT does not use now.

Figure 2. Contracts Window - Description Panel

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

TDOT WILL PRIMARILY USE THE COMPLETION DATE CONTRACT TIME CHARGE TYPE.
**Exercise 2**

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

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00001</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>TRN349</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. On the **Description** panel, view the information available.

2. To which region and unit is this contract assigned? ________________

3. How is time calculated on this contract? __________________________

4. What is the dollar value of this contract? ______________________

*You’ve reviewed the region and unit assignment, time calculation and dollar value of this contract.*
**Viewing the Contract Location**

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

![Contracts Window - Location Panel](image)

**Exercise 3**

In this exercise, view the location for a contract.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00001</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>TRN349</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

You’ve viewed the contract’s location.
Viewing Contract Payment Data

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

Figure 4. Contracts Window - Payment Data Panel

THE FUNCTIONS OF THIS WINDOW WILL NOT BE USED.

Exercise 4

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

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

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

You’ve viewed the contract’s payment data.
Viewing Critical Dates

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

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

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

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

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

![Contracts Window - Critical Dates Panel](image)

Figure 5. Contracts Window - Critical Dates Panel

THE HEADQUARTERS FINANCE OFFICE UPDATES THE CRITICAL DATES PANEL.

THE HEADQUARTERS FINANCE OFFICE UPDATES THE NOTICE TO PROCEED DATE AFTER RECEIVING THE STARTING NOTICE REPORT FROM THE OFFICE STAFF.
<table>
<thead>
<tr>
<th><strong>SiteManager Critical Date</strong></th>
<th><strong>TDOT Term (if applicable)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted Date</td>
<td>Final Inspection Date</td>
</tr>
<tr>
<td><strong>Adjusted Completion Date</strong></td>
<td>The original completion date altered by a Change Order (Supplemental) plus time adjustment for item overruns/underruns.</td>
</tr>
<tr>
<td>Assigned to FM Date</td>
<td>N/A</td>
</tr>
<tr>
<td>Award Date</td>
<td>Award Date</td>
</tr>
<tr>
<td>Checked Out to Field Date</td>
<td>System populated when the contract is pipelined out to standalone. Changed back to zero when checked back in.</td>
</tr>
<tr>
<td>Commissioner Approved Completion Date</td>
<td>The original completion date altered by a Change Order (Supplemental).</td>
</tr>
<tr>
<td>Contract Archived Date</td>
<td>N/A</td>
</tr>
<tr>
<td>Contract Items Complete Date</td>
<td>N/A</td>
</tr>
<tr>
<td>Contractor Bankruptcy Date</td>
<td>N/A</td>
</tr>
<tr>
<td>Contractor Default Date</td>
<td>N/A</td>
</tr>
<tr>
<td>Contractor Final Release Date</td>
<td>Claim Expiration Date (Advertisement Due Date)</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Date the contractor is required to begin work for Completion Date contracts.</td>
</tr>
<tr>
<td>Execution Date</td>
<td>Accepted Date</td>
</tr>
<tr>
<td>Letting Date</td>
<td>Letting Date</td>
</tr>
<tr>
<td><strong>Notice to Proceed Date</strong></td>
<td>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.</td>
</tr>
<tr>
<td>Open to Traffic Date</td>
<td>N/A</td>
</tr>
<tr>
<td>Original Completion Date</td>
<td>The completion date established by the contract.</td>
</tr>
<tr>
<td>Price Adjustments Base Date</td>
<td>Auto-populated with first day of letting’s month (even if no price adjustment exists)</td>
</tr>
<tr>
<td>Physical Work Complete Date</td>
<td>N/A</td>
</tr>
<tr>
<td>Signed Date</td>
<td>Signed Date</td>
</tr>
<tr>
<td><strong>Substantial Work Complete Date</strong></td>
<td>Date to Stop Charging Time (for Completion Date contracts)</td>
</tr>
<tr>
<td>Work Begin Date</td>
<td>Date Work Actually Began (Starting Notice)</td>
</tr>
</tbody>
</table>

Table 1. TDOT Equivalents to Default Critical Dates
Exercise 5

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

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

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

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

3. What is the Notice to Proceed Date? _________________

4. What is the Original Completion Date? _______________

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

Viewing Contract Primary Personnel

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

The terms project manager and project engineer are SiteManager terms and have no significance other than the fact that they are the first two to receive contract authority.
THE HEADQUARTERS CONSTRUCTION OFFICE WILL ENTER THE ASSIGNED DISTRICT SUPERVISOR IN BOTH THE PROJECT MANAGER AND PROJECT ENGINEER FIELD.

Exercise 6

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

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

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

2. Who is the Project Supervisor for contract TRN349?

You’ve viewed the project manager and project engineer assignments.
**Viewing the Prime Contractor and Associates**

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

![Contracts Window - Prime Contractor Panel](image)

Figure 7. Contracts Window - Prime Contractor Panel

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

![Address Button](image)

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

SINCE TDOT DOES NOT RECORD AN INSURANCE COMPANY FOR THE PRIME CONTRACT, THE PLACEHOLDER VALUE, SITEMANAGER GENERIC INSURANCE, IS SUBSTITUTED FOR A REAL VALUE. TDOT WILL RECORD ACTUAL ASSOCIATES FOR BONDING AND SURETY.
Exercise 7

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

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

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

2. Who is the prime contractor? ______________________________

3. Who is the bonding company? _____________________________

4. Who is the surety company? _______________________________

You’ve viewed the prime contractor and its surety and insurance companies for a contract.
Viewing the DBE Commitment Goal

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

![Contracts Window - DBE Commitment Panel](image)

**IF THE CONTRACT HAS A DBE GOAL, THE DBE PERCENTAGE WILL BE DISPLAYED IN THE 'DBE GOAL PERCENT' FIELD.**

Figure 9. Contracts Window - DBE Commitment Panel

**Exercise 8**

In this exercise, view the DBE goal and commitment.

User ID: jj0001 Password: pass
Connection: Server
Group Name: FIELD - Operations Inspector [INSP]
Prior Keys: TRN349

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

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

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

*You’ve viewed the DBE goal and commitment.*
Understanding the Training Plan Panel

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

Viewing Contract Milestones

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

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

Milestone Time Charges

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

- **Calendar Day and/or Completion Date Milestone** – These types of milestones require the “work start” date and “actual completion” date be entered. There will be no charge on the Diary window Charge panel for these types of milestones. (Litter Cycles)

- **Working Days (Available Days)** – These types of milestones require the “work start” date and “actual completion” date be entered. It will also require days to be charged on the Diary window’s Charge panel for these types of milestones. (Mowing Cycles)

![Figure 10. Milestones Window](image-url)
Exercise 9

In this exercise, view a milestone for a contract.

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

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

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

2. How many milestones are currently listed for this contract? _____

3. Select milestone 03.

4. What is the description of milestone 03? _________

5. What is the Work Start Date for milestone 03? _________

6. How many bid days is Mowing Cycle 1? _________

7. Close.

You’ve viewed milestones.
Viewing Contract Projects

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

![Figure 11. Projects Window - Description Panel](image)

**Exercise 10**

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

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

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

2. How many projects are on this contract? ________________

3. In the **Project Nbr** area, in the **PCN** column, scroll to and double-click project 67004-3213-14. The system displays the Projects window.

4. Review the **Description** panel.

5. What is the project description? ________________________

6. What is the route number? ________________________

*You’ve viewed a project description.*
Viewing Project Counties

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

![Projects Window - Counties Panel](image)

Exercise 11

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

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

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

2. In which county is this project located? ________________

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

*You’ve viewed the project’s county.*
Viewing Contract Items

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

Figure 13. Items Window

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

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

THE MAJOR ITEM INDICATOR WILL BE CHECKED FOR THOSE ITEMS DETERMINED TO BE MAJOR ITEMS DURING THE CONTRACT ACTIVATION PROCESS."
Exercise 12

In this exercise, review an item for a contract.

User ID jj0001 Password pass
Connection Server
Group Name FIELD - Operations Inspector [INSP]
Prior Keys TRN349

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

2. In the Project area, in the PCN column, scroll to double-click 67004-3213-14.

Review an item.

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

4. In the Item Code column, scroll to and double-click 109-01.01 for line number 9028 and category 0100. The system displays the item record for PAY ADJUSTMENT FOR FUEL.

5. What is the unit price? _____________________________

6. What is the bid quantity? _____________________________

Review another item.

7. Click Open.

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

9. In the Item Code column, scroll to and double-click 607-10.30 for line number 0930 and category 0100. The system displays the item record for 54" PIPE CULVERT.

10. What is the unit price? _____________________________

11. What is the bid quantity? _____________________________

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

You’ve reviewed a contract item.
Viewing Contract Funding

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

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

Figure 14. Contract Funding Window

Figure 15. Contract Funding Window (Example of More Complex Funding)
THE CONTRACT FUNDING WINDOW IS LOADED FROM THE AASHTOWARE PROJECT PRECONSTRUCTION MODULE.

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

**Exercise 13**

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

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

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

2. View the funding for the contract.

3. Examine Figure 15 for an example of a more complexly funded contract.

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

You’ve viewed the **Contract Funding window**.
Viewing Subcontracts

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

Figure 16. Subcontracts Window - Description Panel

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

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

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

SITEMANAGER DEFINES “COMMITMENT” AS DBE COMMITMENT. SUBCONTRACTS THAT ARE NOT DBE ARE NOT INCLUDED IN THE COMMITMENT DATA.
Exercise 14

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

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

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

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

3. Double-click the **Subcontracts** icon. The system displays the Select Contract ID window.

4. How many subcontracts are there for this contract? _______

5. How many subcontractors are DBE’s for this contract? _______

6. In the **Subcontract** area, in the **Subcontractor** column, scroll to and double-click **TENNESSEE TEXTURE, LLC**, subcontract 00000003.

7. What is the approval date for this subcontract? ________________

8. Is this a “nested” subcontract? ______________________________

You’ve viewed a subcontract.
**Viewing Subcontract Items**

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

![Subcontracts Window - Items Panel](image)

**Figure 17. Subcontracts Window - Items Panel**

**Exercise 15**

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

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

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

2. How many items are on this subcontract? ____________

3. What is the total quantity and dollar amount for item 604-04.01, **APPLIED TEXTURE FINISH (NEW STRUCTURES)** for project number 67004-3213-14 and line item 2630? ____________

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

*You’ve viewed a subcontract item.*
Summary

To access the Contract Records panel:

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

To open a contract in the Contracts window:

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

To view a contract’s description:

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

To view a contract location:

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

To view a contract’s payment data:

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

To view the actual date of a contract critical date:

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

To view primary personnel for a contract:

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

To view a prime contractor:

1. On the Contracts window, click the Prime Contractor tab.
To view the DBE goal for a contract:

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

To view a milestone for a contract:

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

To view a project on a contract:

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

To view a project county:

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

To view an item on a contract:

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

To view contract funding:

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

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

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

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

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

5. Click **OK**. The system displays the Subcontract window.

To view an item on a subcontract:

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

In this exercise, review a contract.

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

1. Navigate to the Contracts window.

2. Open contract TRN350.

3. To which region and unit is this contract assigned? ______________

4. What is the work type for this contract? __________________________

5. What is the execution date of the contract? ______________

6. What is the bonding company? __________________________

7. Navigate to the Milestones window.

8. Has milestone 01 on contract TRN350 been started? __________


10. How many projects are on this contract? ______________

11. Navigate to the Items window.

12. Open contract TRN350, project 67004-3213-14, category 0500, line item number 2700, item code 620-05.01 CONC PARAPET SINGLE SLOPE (STD-1-1SS).

13. What is the bid quantity? __________________________

14. Is it on a change order? __________________________

15. Navigate to the Contract Funding window.

16. How many categories are there on project 67004-3213-14? _____

17. Navigate to the Contractor Management panel.

18. Navigate to the Subcontracts window and open subcontract 00000002 on contract TRN350.

19. Who is the subcontractor? __________________________
20. Is this subcontractor a DBE? _____________________________

21. Is this subcontractor approved to install line item 2630, item code 604-04.01? _____________________________

22. Exit SiteManager.
Creating Daily Work Reports for Field and Office Documentation (Part 1)

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

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

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

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

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

![Daily Work Reports Window - DWR Info Panel (Before Choosing Keys)](image)

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

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

Note: Inspectors should make sure the network cable is unplugged from the laptop when creating a DWR in standalone mode. This is a precaution to avoid accidentally creating the DWR on the server.
The Daily Work Reports window has the following panels:

**DWR Info**

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

**Contractors**

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

**Contractors Equip**

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

**Daily Staff**

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

**Work Items**

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

**Force Accounts**

TDOT will not use this feature.
Exercise 1

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

User ID: jj00004  
Password: pass

Connection: Standalone

Group Name: FIELD - Operations Inspector [INSPST]

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

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

Choosing Keys

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

Figure 2. Daily Work Reports Window – Services Menu – Choose Keys (Detail)
Entering Basic Daily Work Report Information

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

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

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

![Daily Work Reports Window - DWR Info Panel](image)

Figure 3. Daily Work Reports Window - DWR Info Panel

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

Exercise 2

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

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

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

Record the date.
3. In the DWR Date field, type 101114.

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

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

Add a remark about the work performed.
8. In the Remarks Type list box, scroll to and click -Work Performed-.
10. On the keyboard press Enter.
11. On the new line, type Floyd & Floyd Contractors - Installed Construction Signs at the West Fork Obey River.

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

14. Save.

You’ve created a new DWR and completed the DWR Info panel.
**Entering Contractor Activity**

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

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

![Figure 4. Daily Work Reports Window - Contractors Panel](image)

**Prime Contractor and Subcontractors**

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

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

**Note:**

- **ALL CONTRACTORS (PRIME CONTRACTORS AND SUBCONTRACTORS) ON SITE SHOULD BE INDICATED ON THE DAILY WORK REPORTS WINDOW’S CONTRACTORS PANEL. IF THE SUBCONTRACTOR IS ON SITE, THE USER MUST INDICATE THE SUBCONTRACTOR IN THE CONTRACTOR AREA OF THE CONTRACTORS PANEL. IF THE SUBCONTRACTOR IS NOT ON THE DROPDOWN LIST FOR THIS CONTRACT, CONTACT THE FIELD OFFICE SO IT MAY BE ADDED.**
Exercise 3

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

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

Record the prime contractor on site today.

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

Record the subcontractor on site today.

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

You’ve completed the Contractors panel.

Contractor Supervisor

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

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

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

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

Exercise 4

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

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

Add a personnel type for the subcontractor on site today.

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

Add another personnel type for the subcontractor on site today.

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

Add another personnel type for the subcontractor on site today.

8. Click the New button. The system inserts a blank row.
9. In the Personnel Type dropdown list, select Unskilled Laborer.
10. In the Nbr of Persons field, type 3.
11. Save.
Add personnel for the prime contractor on site today.

12. In the **Contractors** pane, select the contractor **Highways, Inc**.

13. Click the **Personnel Type** pane.

14. Click the **New** button. The system inserts a blank row.

15. In the **Personnel Type** dropdown list, select **Foreman**.

16. In the **Nbr of Persons** field, type 1.

17. **Save**.

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

## Modifying Personnel Type Master List

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

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

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

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

![Daily Work Reports Window - Contractor Equip Panel](image)

**Figure 5. Daily Work Reports Window - Contractor Equip Panel**

**DO NOT EDIT** VALUES IN THE NBR OF SUPERVISORS OR NBR OF WORKERS FIELDS. THESE FIELDS ARE AUTOMATICALLY POPULATED.

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

**IF AN EQUIPMENT SELECTION IS NOT AVAILABLE, CONTACT THE FIELD OFFICE SO IT MAY BE ADDED TO THE DWR MASTER LIST.**
Exercise 5

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

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

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

Add equipment for the subcontractor.

2. In the Contractor pane, select Floyd & Floyd Contractors.

3. Click in the Equipment ID - Description pane, then click the New button. The system inserts a blank row.

4. In the Equipment ID - Description dropdown list, select Pickup Truck.

5. In the Nbr. of Pieces field, type 2.

6. In the Nbr Used field, type 2.

Add another piece of equipment for the subcontractor.

7. Click the New button. The system inserts a blank row.

8. In the Equipment ID – Description dropdown list, select Bobcat.

9. In the Nbr. of Pieces field, type 1.

10. In the Nbr Used field, type 1.

11. Save.

Add equipment for the prime contractor.

12. In the Contractor pane, select Highways, Inc.

13. Click in the Equipment ID - Description pane.

Record a piece of equipment that was unused.

14. On the toolbar, click the New button. The system inserts a blank row.
15. In the **Equipment ID - Description** dropdown list, select **Bulldozer**.

16. In the **Nbr. of Pieces** field, type **1**.

17. In the **Nbr Used** field, type **0**.

Record a piece of equipment that was used.

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

19. In the **Equipment ID - Description** dropdown list, select **Pickup Truck**.

20. In the **Nbr. of Pieces** field, type **1**.

21. In the **Nbr Used** field, type **1**.

22. **Save**.

*You’ve completed the Contractor Equip panel.*

**Modifying the Equipment Master List**

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

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

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

Figure 6. Daily Work Reports Window - Daily Staff Panel

The District Supervisor will determine which user will record the name of the TDOT staff members on site, as well as the total number of hours each staff member was at the project site. The total number of regular and overtime hours will be entered in the REG. HOURS COLUMN. All other fields should be left blank.

Users not designated by the project supervisor should not complete this panel.
Exercise 6

In this exercise, add daily staff to a DWR.

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

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

Record a staff member on site today.

2. Click the New button. The system inserts a blank row.

3. In the Staff Member dropdown list, select Alber, Jane.

4. In the Reg. Hours field, type 7.5.

Record another staff member on site today.

5. Click the New button. The system inserts a blank row.

6. In the Staff Member dropdown list, select Litte, Janice.

7. In the Reg. Hours field, type 7.5.

8. Save.

You’ve completed the Daily Staff panel.
Selecting and Recording Work Items

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

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

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

Figure 8. Daily Work Reports Window - Work Items Panel (Selecting)
Clicking the Record Work Item button displays the Work Items window with usage information on the selected item for the DWR. View existing data for the work item or add new usage data on the Work Items panel.

The Work Items panel displays the following Item information:

- **Qty Reported to Date** – Total quantity reported on DWRs. However, while working in standalone this quantity may appear to be doubled (known issue). The correct quantity appears on the server.

- **Qty Authorized to Date** – Total quantity reported on DWRs that were authorized in diaries.

- **Units Type** - The unit of measure for the pay item.

- **Qty Installed to Date** – Total quantity reported on DWRs that were authorized in diaries and included in approved and pending estimates.

- **Qty Paid to Date** – Total quantity reported on DWRs that were authorized in diaries and included in an estimate of any status. This value will always be the same as the Qty Installed to Date for TDOT when all estimates are approved.

- **Current Contract Qty** - Current contract quantity of the contract line item including any change orders. Current quantity is calculated by the sum of bid quantity and the net change order quantity.
On the Work Items (Selecting) panel, it is important to choose the correct item especially when a contract has multiple projects and/or categories which can contain duplicate items. The following table defines categories per items.

<table>
<thead>
<tr>
<th>Item Types</th>
<th>Participating Categories</th>
<th>Non-Participating Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roadway Items</td>
<td>0100</td>
<td>0110 - 0190</td>
</tr>
<tr>
<td>Box Bridge Items</td>
<td>0300</td>
<td>0310 - 0390</td>
</tr>
<tr>
<td>Bridge Items</td>
<td>0500</td>
<td>0510 – 0590</td>
</tr>
<tr>
<td>Maintenance Items</td>
<td>0700</td>
<td>0710 – 0790</td>
</tr>
<tr>
<td>Utility Items</td>
<td>0900</td>
<td>0910 – 0990</td>
</tr>
<tr>
<td>Alternate Bid Items</td>
<td>≥ 1000</td>
<td></td>
</tr>
</tbody>
</table>

Table 1. TDOT Categories

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

- Participating Categories are used the majority of the time and are paid by normal funding sources.

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

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

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

- **Placed Qty** – If not editable, the item requires a DWR template. See the following section for details.

- **Contractor** – Select the prime contractor or any subcontractor approved to perform work on the bid item. If more than one contractor performs work on the same bid item, select the contractor performing the majority of the work. Record work performed on non-bid items (Add-On Items and Change Order Items) against the prime contractor regardless of who is performing the work. Identify these items by a Bid Qty of zero and a line item number that ranges from 9000-9499 (Add-On Items) and 9500-9999 (Change Order Items).

- **Location** – In addition to the required Location field, use the Station fields when appropriate.
Exercise 7

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

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

1. Click the Work Items tab. The system displays the Work Items panel.

2. Scroll to and select the following:
   Project Nbr 67004-3213-14, Line Item Number 0030,
   Category Number 0100, Item Code 201-01,
   Description CLEARING AND GRUBBING.

3. Click the Record Work Item button. The system displays the info on the Work Items panel.

Enter the information about the work item.

4. Click the New button.

5. In the Placed Qty field, type 0.20

6. In the Contractor dropdown list, select Highways, Inc.

7. In the Location field, type Grey Road.

8. Save.

Prepare to record the next item.

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

You’ve recorded a work item.
Selecting and Recording to a DWR Template

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

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

Figure 10. DWR Template Button

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

Figure 11. DWR Template Window

Template SM01 is a generic template and should only be used when it is not possible to record data on the template designed for the item of work being performed.

TEMPLATE SM01 IS A GENERIC TEMPLATE AND SHOULDN'T BE USED WHEN IT IS NOT POSSIBLE TO RECORD DATA ON THE TEMPLATE DESIGNED FOR THE ITEM OF WORK BEING PERFORMED.
Exercise 8

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

User ID: JJ0004  Password: pass
Connection: Standalone
Group Name: FIELD - Operations Inspector [INSPST]
Keys: TRN352 (contract), 10/11/14 (DWR)

Locate the work item.

1. Scroll to and select the following:

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

Record information about the work item.

2. Click the Record Work Item button. The system displays the info on the Work Items panel.

3. Click the New button.

4. Why is the Placed Qty field gray and un-editable for this item?
5. In the Contractor dropdown list, select Floyd & Floyd Contractors.

6. In the Location field, type S.R. 85 at the West Fork Obey River.

7. Save. The system displays the DWR Template window.

8. What is the title of the window that displayed when the save button was clicked? ______________________________

Complete the DWR template.

9. In the Description column, double-click 22A - Aluminum Signs.

10. In the Sign Schedule field, type 12B.

11. In the Legend field, type General Robert R Neyland Bridge.

12. In the Size field, type 24” x 60”.

13. In the Area of Each Sign field, type 10.00.

14. In the # of Signs field, type 4.

15. What is displayed in the Pay Quantity field? ______________

16. In the Location 1 field, type S.R. 85 SB @ L.M. 17.85.

17. In the Location 2 field, type S.R. 85 NB @ L.M. 18.10.

18. Save.

19. Close. The system displays the Daily Work Reports window.

20. Save.

You’ve completed a DWR template associated to a work item.
Additional Examples of DWR Templates

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

Examples follow:

**Figure 13. DWR Template (SM05) - Detail**

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

**Figure 14. DWR Template (MMS02) - Detail**
Previewing a DWR

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

Figure 15. Preview DWR Button

![Figure 15. Preview DWR Button](image1)

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

![Figure 16. Print Preview Window (after clicking Preview DWR button)](image2)

Exercise 9

In this exercise, preview a DWR.

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

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

You’ve previewed a DWR.
Exercise 10

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

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

Open an existing DWR.

1. On the Daily Work Reports window, click the DWR Info tab. The system displays the DWR Info panel and makes the Open button available.

2. Click the Open button. The system displays the Contract ID window.

3. In the Inspector area, in the Inspector Name column, double-click Bell, Troy.

4. In the Date area, in the DWR Date column, double-click 10/09/14. The system displays the Daily Work Reports window.

5. Review the details on the DWR Info panel.

Add a remark.

6. In the Remarks Type list box, scroll to and click Visitor.

7. In the Remarks text box, type TDOT’s Chief Engineer visited job site.

8. Save.

Review some more of the information on this DWR.

9. Click the Contractors tab.

10. Was the prime contractor on-site?

11. Click the Contractor Equip. tab.

12. How many pieces of equipment are listed on this DWR?
13. Click the **Daily Staff** tab.

14. How many agency staff members were on site? ______

15. **Exit SiteManager.**

*You’ve opened an existing DWR and added remarks.*

---

**Exercise 11**

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

**User ID** jj00002  **Password** pass

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

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

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

3. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.

4. While on the **DWR Info.** panel, click the **Services** menu.

5. Click the **Choose Keys** choice.

6. In the **Contract ID** column, scroll to and double-click TRN352.

7. In the **DWR Date** field, type 101214.

Add a remark about the work performed.

8. In the **Remarks Type** list box, scroll to and select **-Work Performed-**.

9. In the **Remarks** text box, type **Office Staff Documentation for Ticketed Items**.

10. Save.
Record the contractor on site today.

11. Click the **Contractors** tab. The system displays the Contractors panel.

12. Click in the **Contractor** pane, then click the **New** button. The system inserts a blank row.

13. In the **Contractor** dropdown list, click **Highways, Inc. **PRIME **

14. **Save.**

Record work items.

15. Click the **Work Items** tab. The system displays the Work Items panel.

16. Scroll to and select the following:

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

17. Click the **Record Work Item** button. SiteManager displays the info on the Work Items panel.

Enter the information about that work item.

18. Click the **New** button.

19. In the **Contractor** dropdown list, select **Highways, Inc.**

20. In the **Location** field, type **266+50 to 268+50**.

21. **Save.** The system displays the DWR Template window.
Complete the DWR template.

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

![Figure 17. DWR Template – SM39 Window](image)

23. In the **Report Number** field, type 1.

24. In the **Ticket Bundle# (if applicable)** field, type 1.

25. In the **Total Ticketed Tons (Pay Qty)** field, type 1200.0.

26. In the **Material Code** dropdown list, select **303.01.001 Base (Mineral Aggregate, Type A)**. The template displays the description only.

27. In the **Producer Supplier** dropdown list, select **Dunlap Stone – Dunlap Aggregate**.

28. **Save**.

29. **Close**. The system displays the Daily Work Reports window.

30. **Save**.

31. **Exit SiteManager**.

*You’ve created a DWR on the server.*
Summary

To access the Daily Work Report window:

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

To enter basic DWR information:

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

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

To add a personnel type to a Daily Work Report:

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

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

2. On the Daily Work Reports panel, double-click the Daily Work Reports icon.

3. Open an existing unauthorized, unlocked DWR created by you or create a new DWR.

4. Enter or modify basic DWR Info.

5. **Save**.

6. Click the Contractors tab.

7. Add the contractor who supplied the equipment.

8. **Save**.

9. Click the Contractor Equipment tab.

10. If there is more than one Contractor listed, click the Contractor who supplied the equipment.

11. Click the Equipment ID field and click the New button. An empty row is added to the list.

12. In the Equipment ID dropdown list, select the desired equipment ID.

13. In the Nbr of Pieces field, type the number of pieces of this equipment present on this date.

14. In the Nbr Used field, type the number of pieces of this equipment used on this date.

15. **Save**.
To add Daily Staff to a Daily Work Report:

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

2. On the Daily Work Reports panel, double-click the Daily Work Reports icon.

3. Open an existing unauthorized, unlocked DWR created by you or create a new DWR.

4. Click the Daily Staff tab.

5. Click the New button on the toolbar.

6. In the Staff Member dropdown box, click the name of the staff member you want to add.

7. In the Reg. Hours field, type the number of hours the staff member worked.

8. Save.

To select and record a work item:

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

2. On the Daily Work Reports panel, double-click the Daily Work Reports icon.

3. Open an existing unauthorized, unlocked DWR created by you or create a new DWR.

4. Enter or modify basic DWR Info.

5. Save.

6. Click the Contractors tab.

7. Add the contractor who installed the work item(s).

8. Save.

9. Click the Work Items tab.

10. In the Work Item list box, scroll to and click the work item whose installation needs to be recorded.

11. Click the Record Work Item button.

12. Click the Location Installed field and click the New button. An empty row is inserted on the Record Work Item List.
13. In the **Placed Qty** field, type the quantity of the item installed at this location.

14. In the **Plan Page Nbr** field, type the page number of a reference to the installed item.

15. In the **Contractor** dropdown list, select the name of the Contractor responsible for the installed item.

16. In the **Location** field, type the location where the item was installed.

17. In the **From Station** field, type the Station ID that identifies where the installation of this Work Item starts.

18. In the **From Station Offset** field, type the offset from the Station ID that identifies where the installation of this Work Item starts.

19. In the **From Station Distance** field, type the offset distance from the Station ID that identifies where the installation of this Work Item starts.

20. In the **To Station** field, type the Station ID that identifies where the installation of this Work Item ends.

21. In the **To Station Offset** field, type the offset from the Station ID that identifies where the installation of this Work Item ends.

22. In the **To Station Distance** field, type the offset distance from the Station ID that identifies where the installation of this Work Item ends.

23. **Save**.

24. Repeat steps 12-31 for additional locations where the work item was installed on this workday.

25. When complete, click the **Select Work Item** button to select additional items for recording or return to the current DWR.
To record work item data to DWR templates:

1. To invoke the DWR Template window click on the DWR Template button or select Edit/View Work Item Template Data from the Services menu.

2. The DWR Template ID window displays the templates available for use with the selected work item. Choose a DWR template to record data to and click the Record Template Data button or choose Record Template Data from the Services menu. The DWR template is displayed.

3. Enter the appropriate data into the fields of the DWR template.

4. When the data is fully entered into the template, Save.

5. To return to the Work Item panel, Close. The Placed Qty field is now populated with the value from the DWR template and the Templt Used box is checked.

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

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

“GARBAGE IN = GARBAGE OUT”
Review Exercise

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

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

1. Start and log on to SiteManager as jj00004 while connected to the standalone.

2. Create a DWR for October 16, 2014 for contract TRN352 using the following information:

Weather conditions:

<table>
<thead>
<tr>
<th>Time</th>
<th>Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>70 degrees</td>
</tr>
<tr>
<td>Low</td>
<td>49 degrees</td>
</tr>
<tr>
<td>AM</td>
<td>Partially Cloudy</td>
</tr>
<tr>
<td>PM</td>
<td>Partially Cloudy</td>
</tr>
</tbody>
</table>

Remarks:

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

Contractor:

Highways, Inc.

Personnel:

<table>
<thead>
<tr>
<th>Role</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreman</td>
<td>1</td>
</tr>
<tr>
<td>Class “B” Operators</td>
<td>2</td>
</tr>
<tr>
<td>Class “D” Operators</td>
<td>1</td>
</tr>
<tr>
<td>Truck Driver (3/4 axles)</td>
<td>2</td>
</tr>
</tbody>
</table>
Equipment (on site and used):

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backhoe</td>
<td>1</td>
</tr>
<tr>
<td>Pickup Truck</td>
<td>3</td>
</tr>
<tr>
<td>Bulldozer</td>
<td>1</td>
</tr>
<tr>
<td>Bobcat</td>
<td>1</td>
</tr>
<tr>
<td>Haul Truck</td>
<td>2</td>
</tr>
</tbody>
</table>

Daily Staff:

<table>
<thead>
<tr>
<th>Name</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baum, Paul</td>
<td>7.5 hours</td>
</tr>
<tr>
<td>Harris, Ellen</td>
<td>7.5 hours</td>
</tr>
</tbody>
</table>

Items:

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

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

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

<table>
<thead>
<tr>
<th>Placed Quantity</th>
<th>Contractor</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>Highways, Inc.</td>
<td>Station 16+75 RT Centerline</td>
</tr>
</tbody>
</table>

3. Exit SiteManager.
Creating Daily Work Reports
for Field and Office Documentation (Part 2)

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

- Copying a Daily Work Report 2
- Modifying a Copied Daily Work Report 4
- Creating and Using Attachments 14
- Summary 19
- Review Exercise 21
Creating Daily Work Reports for Field and Office Documentation (Part 2)

Copying a Daily Work Report

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

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

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

- Basic DWR Info
- Installed Work Items and Templates

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

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

![Daily Work Reports Window - DWR Info Panel](image)

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

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

DATE, TEMPERATURE, WEATHER CONDITIONS, WORK PERFORMED REMARKS INCLUDING CONTRACTOR NAME, APPROPRIATE REMARKS
Exercise 1

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

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

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

First, open the DWR to copy.

2. On the Main Panel panel, double-click the Daily Work Reports icon. The system displays the Daily Work Reports panel.

3. Double-click the Daily Work Reports icon. The system displays the Daily Work Reports window.

4. Click the Open button. The system displays the Contract ID window.

5. In the Contract ID area, in the Contract ID column, double-click TRN352.

6. In the Inspector area, double-click jj00004.

7. In the Date area, in the DWR Date column, scroll to and double-click 10/17/14. The system displays the Daily Work Reports window.
Copy the contractor information from the open DWR to a new DWR for a specified date.

8. In the **DWR Date** field, type **101814**.

9. On the keyboard, press the **Tab** key. The system displays a message prompting you to confirm your desire to copy the contractor information.

10. In the message, click the **Yes** button.

11. **Save**.

*You’ve copied a DWR.*

**Modifying a Copied Daily Work Report**

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

**Contractors Panel**

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

---

**STRESS THIS!**

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

---

**Figure 2. Daily Work Reports Window - Contractors Panel**

---

**NBR OF WORKERS FIELD IS AUTO POPULATED – DO NOT ENTER DATA.**
Exercise 2

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

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

Enter the temperatures and conditions for today.

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

Enter a remark about the work performed.

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

7. Save.

Record the personnel on site.

8. Click the Contractors tab. The system displays the Contractors panel.  
9. In the Contractor pane, in the Contractor column, select Highways, Inc.

10. In the Personnel Type pane, select Class “B” Operators.  
11. In the Nbr of Persons field, type 1 (overwriting the 2).  
12. Save.
Record a subcontractor.

13. Click the **Contractor** area.

14. Click the **New** button. The system inserts a blank row.

15. In the **Contractor** dropdown list, select **Floyd & Floyd Contractors**.

16. **Save**.

Add a personnel type for that subcontractor.

17. Click the **Personnel Type** area.

18. Click the **New** button. The system inserts a blank row.

19. In the **Personnel Type** dropdown list, select **Class “D” Operator**.

20. In the **Nbr of Persons** field, type **1**.

Add a second personnel type for that subcontractor.

21. Click the **New** button. The system inserts a blank row.

22. In the **Personnel Type** dropdown list, select **Foreman**.

23. In the **Nbr of Persons** field, type **1**.

Add a third personnel type for that subcontractor.

24. Click the **New** button. The system inserts a blank row.

25. In the **Personnel Type** dropdown list, select **Unskilled Laborer**.

26. In the **Nbr of Persons** field, type **4**.

Add a fourth personnel type for that subcontractor.

27. Click the **New** button. The system inserts a blank row.

28. In the **Personnel Type** dropdown list, select **Truck Driver**.

29. In the **Nbr of Persons** field, type **1**.

30. **Save**.

*You’ve modified the contractors, supervisors, and personnel types for a copied DWR.*
Contractor Equip Panel

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

![Contractor Equip Panel](image)

Figure 3. Daily Work Reports Window - Contractor Equip Panel

Exercise 3

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

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

1. Click the Contractor Equip tab. The system displays the Contractor Equip panel.

2. In the Contractor pane, in the Contractor column, select Floyd & Floyd Contractors.

3. Click in the Equipment ID-Description area. Add an equipment type for that subcontractor.

4. Click the New button. The system inserts a blank row.

5. In the Equipment ID-Description dropdown list, select Pickup Truck.
6. In the **Nbr of Pieces** field, type 2.

7. In the **Nbr Used** field, type 2.

8. **Save.**

Delete an equipment type for the Prime Contractor.

9. In the **Contractor** pane, in the **Contractor** column, select **Highways, Inc.**

10. In the **Equipment ID - Description** pane, in the **Equipment ID - Description** column, select **Bulldozer.**

11. Click the **Delete** button. The system displays a message prompting you to confirm the decision to delete.

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

13. **Save.**

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

---

**Daily Staff Panel**

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

![Daily Staff Panel](image)

*Figure 4. Daily Work Reports Window - Daily Staff Panel*
**Exercise 4**

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

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00004</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Standalone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector (INSPST)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>TRN352 (contract); jj00004 (user ID); 10/18/14 (DWR date)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

2. In the **Staff Member** column, select **Baum, Paul**.

3. On the toolbar, click the **Delete** button. The system displays a message prompting you to confirm the decision to delete.

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

Now, modify the hours for the daily staff.

5. In the **Staff Member** column, select **Harris, Ellen**.

6. In the **Reg Hours** field, type **9** (overwriting 7.5).

7. **Save**.

*You’ve modified the daily staff for a copied DWR.*
Work Items Panel

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

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

Figure 6. DWR Template Window (SM07)
Exercise 5

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

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

Record a work item.

1. Click the **Work Items** tab. The system displays the Work Items panel.

2. Scroll to and select the following:

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

3. On the toolbar, click the **Record Work Item** button.

4. Click **New**. The system displays fields to capture location and contractor information.
Record the details about the work item.

5. In the **Plan Page Nbr** field, type 9.

6. In the **Contractor** dropdown list, select **Highways, Inc.**

7. In the **Location** field, type **Bent 2 10+90 Column A, Footing D.**

8. **Save.** The system displays the DWR Template window.

Choose a template.

9. In the **Description** column, select **07 CONCRETE PRODUCTION PILING (ENGLISH).** The system displays the DWR Template window.

10. On the toolbar, click the **Record Template Data** button. The system displays the DWR Template – SM07 window.

Enter the structure data.

11. In the **Structure Type** dropdown list, select **Bridge.**

12. In the **Bridge Number** field, type 1.

13. In the **Substructure Type** dropdown list, select **Bent.**

14. In the **Bent Number** field, type 2.

15. Press **Tab.**

16. Note that the **Location** field is automatically populated.

17. In the **Station/Position** field, type **10+90 Column A, Footing D.**

18. In the **Length Set** field, type 35.0.

19. In the **Required Bearing** field, type 90.0.

20. **Save.**

Enter the pile information.

21. In the **Pile Number** field, type 1.

22. In the **Initial Length (ft)** field, type 35.0.

23. In the **Pile Stripped for Seismic? (-2’)** field, click **Yes.**
24. In the **Cut-Off (ft)** field, type 4.0.

25. In the **Refusal?** field, click Yes.

26. **Save.**

27. What is the total pay quantity? ________________

28. **Close.**

Review the results.

29. Note the **Placed Qty** field has been populated.

30. What was the total placed quantity? ________________

31. **Save.**

Record another work item.

32. Click the **Selects Work Item** button. The system displays the Work Items panel.

33. Scroll to and select the following:

   - **Project Number** 67004-3213-14, **Line Item Number** 1110,
   - **Category Number** 0100, **Item Code** 705-02.02,
   - **Description** Single Guardrail (Type 2)

34. On the toolbar, click the **Record Work Item** button.

35. Click **New**. The system displays fields to capture location and contractor information.

Record the details about the work item.

36. In the **Placed Qty** field, type 1250.

37. In the **Contractor** dropdown list, select **Highways, Inc.**

38. In the **Location** field, type **Left Centerline 15+00 to 27+50**.

39. **Save.**

   *You’ve recorded work item details on a copied DWR.*
Creating and Using Attachments

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

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

Creating an OLE Attachment

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

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

![Insert Object Dialog](image)

Figure 8. Insert Object Dialog Invoked by the New OLE button
FIELD OFFICE STAFF AND INSPECTORS WILL USE THE OLE ATTACHMENT FUNCTION IN THE DWR WINDOW TO ATTACH AN EXCEL, WORD OR PDF DOCUMENT TO A RECORDED WORK ITEM. AN EXAMPLE WOULD BE WHEN WORK HAS BEGUN ON AN ITEM BEFORE THE CHANGE ORDER ADDING THAT ITEM HAS BEEN APPROVED IN THE SYSTEM. IN THIS CASE, WORK WILL BE TRACKED USING THE SITE MANAGER LOOSE LEAF FORMS STORED IN FILE MANAGEMENT (ACCESSIBLE VIA A URL LINK IN THE SYSTEM ATTACHMENTS WINDOW). ONCE THE CHANGE ORDER ITEM HAS BEEN ADDED TO THE CONTRACT, A "CATCH-UP" QUANTITY SHOULD BE PLACED ON THE ITEM AND ALL SUPPORTING SITE MANAGER LOOSE LEAF FORMS SHOULD BE ATTACHED TO THE QUANTITY.

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

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

ENTERING A REMARK SUCH AS "VIEW ATTACHMENT" WILL INDICATE TO USERS WHEN VIEWING REPORTS THAT AN ATTACHMENT EXISTS.
Exercise 6

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

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

1. On the toolbar, click the Attachments button. The system displays six more attachment-related buttons on the toolbar.

2. On the toolbar, click the New OLE button. The system displays the Insert Object window.

3. Click the Create From File tab. The system displays the Create From File panel.

   Locate the file to attach.

4. Click the Browse button. The system displays the Browse window.

5. Select the file to be attached: C:\SMTRAINS\SMFILES\ITEM #705-02.02 10182014.pdf

6. Open. The system displays the path to the selected file in the File Name field.

7. Click the OK button. The system displays the OLE Attachment window.

   Describe the attachment.

8. In the Name field, type 705-02.02.

9. In the Description field, type Single Guardrail (Type 2).

   Provide access to the attachment.

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

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

13. **Save.**

   Insert a reminder to the users to view the attachment.

14. Click the Remarks button.

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

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

17. **Save.**

View the attachment.

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

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

20. On the toolbar, click the Run Attachment button.

   The system opens the file with the program associated to the PDF file type.

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

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

23. **Save.**

Prepare for the next exercise.

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

   *You’ve attached and viewed an attachment.*
Exercise 7

In this exercise, preview a DWR.

User ID: jj00004  
Password: pass

Connection: Standalone

Group Name: FIELD - Operations Inspector [INSPST]

Prior Keys: TRN352 (contract); jj00004 (user ID); 10/18/14 (DWR date)

1. On the Services menu, click Preview DWR. The system displays the Print Preview window for the DWR.

2. To preview the DWR in a printable format, click the Next and Prior buttons and use the scroll bar to move from page to page.

3. Close. The system displays the Daily Work Reports window.

You’ve previewed a DWR.
Summary

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

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

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

3. Open.

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

5. On the **Inspector** list box, scroll to and double-click your user ID.

6. On the **Date** list box, scroll to and double-click desired DWR Date. It may not be a locked or authorized DWR.

7. Double-click the **Date** field. The calendar appears.

8. Advance to the correct month and click the correct date for the new Daily Work Report.

9. Click **OK**.

10. Click the **Yes** button for the message box asking if Contractor information should be copied.

11. **Save**.

12. Click the desired tab.

13. Modify the data appropriately.

14. **Save**.
To attach a file to a record:

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

In this exercise, modify a copied DWR.

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

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

2. Temperature and Weather conditions:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>59 degrees</td>
</tr>
<tr>
<td>Low</td>
<td>36 degrees</td>
</tr>
<tr>
<td>AM</td>
<td>Partially Cloudy</td>
</tr>
<tr>
<td>PM</td>
<td>Clear</td>
</tr>
</tbody>
</table>

3. Remarks:

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

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

| Class “A” Operator | 1 |
| Unskilled Laborer  | 4 |
| Sweeping Machine (Vacuum) Operator | 1 |
| Truck Driver (3/4 axles) | 1 |
5. Personnel for subcontractor, Southern Lighting & Traffic Systems
   (update as necessary):

<table>
<thead>
<tr>
<th>Position</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreman</td>
<td>1</td>
</tr>
<tr>
<td>Unskilled Laborer</td>
<td>4</td>
</tr>
<tr>
<td>Skilled Laborers</td>
<td>3</td>
</tr>
<tr>
<td>Truck Driver (2 axles)</td>
<td>1</td>
</tr>
</tbody>
</table>

   (on site and used) (update as necessary):

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pickup Truck</td>
<td>2</td>
</tr>
<tr>
<td>Backhoe</td>
<td>1</td>
</tr>
<tr>
<td>Haul Truck</td>
<td>1</td>
</tr>
<tr>
<td>Sweeping Machine</td>
<td>1</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pickup Truck</td>
<td>2</td>
</tr>
<tr>
<td>Haul Truck</td>
<td>1</td>
</tr>
</tbody>
</table>

8. Daily Staff:

<table>
<thead>
<tr>
<th>Name</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gilligan, Sally</td>
<td>9</td>
</tr>
<tr>
<td>Harris, Ellen</td>
<td>9</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Information</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Page Nbr</td>
<td>16</td>
</tr>
<tr>
<td>Contractor</td>
<td>Highways, Inc.</td>
</tr>
<tr>
<td>Location</td>
<td>BOP to EOP</td>
</tr>
<tr>
<td>Template</td>
<td>SM22A</td>
</tr>
<tr>
<td>Sign Schedule #</td>
<td>12B</td>
</tr>
<tr>
<td>Legend</td>
<td>General Robert R. Neyland Bridge</td>
</tr>
<tr>
<td>Size</td>
<td>24&quot; x 60&quot;</td>
</tr>
<tr>
<td>Area of Each Sign</td>
<td>10.0</td>
</tr>
<tr>
<td># of Signs</td>
<td>4</td>
</tr>
</tbody>
</table>

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

15. Exit SiteManager.
Test Templates to Material Categories

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

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

- Creating Sample Records for Contract Materials
- Understanding Material Codes
- Recording Basic Sample Data for Aggregate at the Plant
- Recording Additional Sample Data
- Recording Contract Sample Data
- Recording Other Sample Data
- Handling Test Assignments
- LIMS (Laboratory Information Management System)
- Entering Test Results in LIMS
- Reviewing Test Results
- Creating a Sample Record for Aggregate Field Density
- Review Exercise for Aggregate Field Density
- Review Exercise for Aggregate at the Plant
- Creating and Completing a Sample Record for Asphalt at the Plant
- Authorizing Samples
- Viewing Test Results and Sample Records at Any Time
- Locating Sample Records in SiteManager 62
- Creating a Sample Record for Asphalt Field Density 65
- Review Exercise for Asphalt at the Plant 68
- Review Exercise for Asphalt Field Density 70
- Creating Sample Records for Concrete from Daily Work Report Items 72
- Copying a Sample Record for Concrete 81
- Review Exercise for Copying Concrete Field Tests 84
- Summary 85
Creating Sample Records for Contract Materials

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

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

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

Understanding Material Codes

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

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

Figure 1. Contract Items to Material Codes Report (CR05) – Example of Page 2
Always, select the correct material code to ensure the correct item codes and destination labs are available to select.

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

EXAMPLE OF A MATERIAL CODE FORMAT:

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

303 - SPEC BOOK SECTION

.01 - SPEC BOOK SUBSECTION

.001 - SEQUENTIAL NUMBER

EXAMPLE OF A T2 MATERIAL CODE FORMAT:

MATERIAL CODE T2.705 – T2 GUARDRAIL (NEW)

T2. – BEGINS ALL MATERIAL CODES USED FOR CERTIFICATION

705 – REPRESENTS THE FIRST THREE DIGITS OF THE ITEM CODE

.1 – A ONE-DIGIT SEQUENTIAL NUMBER, WHEN NEEDED)

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

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

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

Refer to specific sections of the standard operating procedure (SOP 1-1, "Procedures for the Sampling, Testing and Acceptance of Materials and Products") for more detailed information.

<table>
<thead>
<tr>
<th>Sample Type</th>
<th>Acceptance Method</th>
<th>Purpose of the Sample Type and Acceptance Method Pairing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acceptance</td>
<td>Acceptance</td>
<td>Suggested uses:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Use for construction field testing of asphalt mix, concrete mix, soil, and aggregates.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Use if the material qualifies as small quantity.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Fence sampled at the job site, but tested in the lab.</td>
</tr>
<tr>
<td>Verification</td>
<td>Verification</td>
<td><strong>Warning!</strong> For M &amp; T use only.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Suggested uses:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• To verify certifications.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When recording an asphalt split sample, for the part tested in the lab. Link the two sample records of the asphalt sample by lab control number.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When recording contract-specific samples such as steel bar, asphalt cement, emulsions and pavement marking materials.</td>
</tr>
<tr>
<td>Independent Assurance</td>
<td>Independent Assurance</td>
<td><strong>Warning!</strong> For M &amp; T use only.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Suggested uses:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When recording independent assurance samples.</td>
</tr>
<tr>
<td>Certification</td>
<td>Certification</td>
<td>Suggested uses:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When recording a T2 for a material that meets TDOT specifications.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When accepting a material based on certification.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Use for visually accepted samples.</td>
</tr>
<tr>
<td>Information Only</td>
<td>Information Only</td>
<td>This pairing will not satisfy any contract sampling and testing requirements.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Suggested uses:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When sampling to establish a target value for soils to meet in the field.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When recording samples to select aggregate producers/samplers for ticketed items.</td>
</tr>
</tbody>
</table>
### Table 1. TDOT Sample Type and Acceptance Method Pairings

<table>
<thead>
<tr>
<th>Sample Type</th>
<th>Acceptance Method</th>
<th>Purpose of the Sample Type and Acceptance Method Pairing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality</td>
<td>Acceptance</td>
<td>Warning! For M&amp;T use only.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Suggested uses:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When FIELD - M&amp;T Inspector samples batches of grey iron, metal pipe heat numbers, and components that make up pre-stressed bridge members.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When FIELD - M&amp;T Inspector runs aggregate gradations at quarries and ready mix plants.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When recording an aggregate sample taken to ensure expected quality of material.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When recording a rip-rap sample to ensure quality for a contract.</td>
</tr>
<tr>
<td>Design</td>
<td>Information Only</td>
<td>Warning! For M&amp;T use only. This pairing will not satisfy any contract sampling and testing requirements.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Suggested uses:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• ONLY when sampling for the Mix Design approval process.</td>
</tr>
<tr>
<td>Quality</td>
<td>QA/QC</td>
<td>Warning! For M&amp;T use only. This pairing will not satisfy any contract sampling and testing requirements.</td>
</tr>
</tbody>
</table>

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

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

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

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

Table 2. Sample Status Descriptions and Associated Sample/Test Record Locations
Recording Basic Sample Data for Aggregate at the Plant

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

![Figure 3. Maintain Sample Information Window - Basic Sample Data Panel](image)

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

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

THE ‘REPR QTY’ FIELD ON THIS PANEL IS FOR INFORMATION ONLY. THE QUANTITY IS NOT TIED TO TESTING REQUIREMENTS.
Exercise 1

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

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

1. Start and log onto SiteManager as user jj00001 while connected in server mode.
2. On the Main Panel, double-click the Materials Management icon.
4. On the Sampling and Testing panel, double-click the Sample Information icon. SiteManager displays the Maintain Sample Information window.
5. In the Sample Date field, type < yesterday's date >.
   
   Note: The Sample Date field should reflect the date the sample was taken (not the defaulted date or the date the sample was entered).
6. On the Smpl Type dropdown list, select Acceptance.
7. On the Acpt Meth dropdown list, select Acceptance.
8. In the Material field, type 303.
9. Using the right mouse button, click on the Material field.
10. From the object menu, select the Filter Search choice.
11. In the Material Code column, double-click 303.01.001. The system displays the full name of the material, Base (Mineral Aggregate, Type A) to the right of the material code.
12. In the **Sampler** field, type **jj00001**.

13. Using the right mouse button, click on the **P/S** field.

14. From the object menu, select **Search**.

15. To sort the records by name, click the **Producer Supplier Name** column header.

16. In the **Producer Supplier Name** column, double-click **Rogers Group - Cookeville**.

17. On the **Geog Area** dropdown list, select **Region 2 - Overton**.

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

18. In the **Repr Qty** field, type **1000**. This represents the amount of material placed yesterday.

19. **Save**.

20. Record the entire sample ID: ________________________

    *You’ve created a new sample record and recorded basic sample data.*
Recording Additional Sample Data

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

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

Note: The fields on the Addtl Sample Data panel that are required by policy vary based on the type of material sampled.
Exercise 2

In this exercise, record the additional sample data.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
<td>pass</td>
</tr>
<tr>
<td>Connection</td>
<td>Training Server</td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
</tr>
<tr>
<td>Prior Keys</td>
<td>Same sample ID from previous exercise.</td>
</tr>
<tr>
<td>Scenario</td>
<td>Continued</td>
</tr>
</tbody>
</table>

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

2. In the **Smpld From** field, type **Truck**.

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

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

5. In the **Plant ID** column, double-click **27100004**.

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

6. **Save**.

You’ve recorded additional sample data on a sample record.
Recording Contract Sample Data

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

Figure 5. Maintain Sample Information Window - Contract Panel

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

Figure 6. Select Contract/Material Information Window
Exercise 3

In this exercise, record the contract sample data.

User ID: jj0001
Password: pass
Connection: Training Server
Group Name: FIELD - Operations Inspector [INSP]
Prior Keys: Same sample ID from previous exercise.
Scenario: Continued

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

2. On the toolbar, click the **New** button. The system displays the Select Contract/Material Information window.

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

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

5. In the **Contract ID** column, double-click **TRN349**. The system displays information about the associated items.

6. In the **Item Code** column, select **303-01**.

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

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

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

8. **Save.**

*You’ve recorded contract sample data on a sample record.*
**Recording Other Sample Data**

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

![Figure 7. Maintain Sample Information Window - Other Panel (with Search Window detail)](image)

Figure 7. Maintain Sample Information Window - Other Panel (with Search Window detail)
Exercise 4

In this exercise, record the other sample data.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00001</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Training Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>Same sample ID from previous exercise.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scenario</td>
<td>Continued</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

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

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

6. **Save**.

You’ve recorded the destination lab for a sample.

TIP!

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

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

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

**Tip!** To see which tests are assigned by default, click the More button.

![Assign Sample Tests Window](Figure 8. Assign Sample Tests Window)

![Assign Sample Tests Window (after clicking More button)](Figure 9. Assign Sample Tests Window (after clicking More button))
Exercise 5

In this exercise, assign the necessary tests.

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

1. On the toolbar, click the **Open Assign Tests** button. The system displays the Assign Sample Tests window.

   **Note**: The message on the window warns that assigning tests to the sample will lock the sample. If uncertain about the tests needed for the sample, click the Cancel button.

   **TDOT recommends always clicking More instead of Accepting Default Tests.**

2. Click **More**.

   **Note**: Both tests in this example, **T255 - Total Evaporable Moisture of Aggregate by Drying** and **T27 - Sieve Analysis of Fine and Coarse Aggregates**, are default tests so no further action is required.

3. Click **Save Tests**. The system closes the Assign Sample Tests window, makes the Open Assign Tests button unavailable, changes the sample status to Received, and displays the Basic Sample Data panel.
Prepare for the next part of the exercise using an instructor-created sample.

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

5. In the **Sample ID** column, click the column header. The system makes the Find field available.

6. In the **Find** field, type **102054**. The system selects the first row with that combination of numbers.

7. Did it select the sample record **jj0000115AD102054**?

   *If Yes, continue.*
   *If No, scroll to and select sample ID jj0000115AD102054.*

8. Click **OK**. The system displays the Basic Sample Data panel.

   *You’ve assigned the necessary tests and viewed the list of tests assigned to a sample record.*

**LIMS (Laboratory Information Management System)**

Use LIMS to enter, review and authorize test results.

To access LIMS, when logged onto SiteManager, click the Open LIMS button on the Maintain Sample Information window’s toolbar.

![Figure 10. Maintain Sample Information Window (toolbar detail with Open LIMS button)](image)

Or, to go directly to LIMS without logging into SiteManager, double-click the LIMS icon on your desktop and log in.

![Figure 11. SiteManager LIMS Desktop Icon](image)
Entering Test Results in LIMS

To record test results, use the Enter Test Results window.

In the Enter Test Results window:

- Use the top pane to locate your sample record.
- Use the middle pane to view a list of samples and associated tests.
- Use the lower pane to record information in the test template for the row selected in the middle pane.

Figure 12. LIMS – Enter Test Results Window
Using Material Templates to Enter Test Results

Each template has a header containing the test description and an area below the header with three test result status descriptions: In Spec, Out of Spec, and No Spec.

Based on test results, the system automatically denotes the status. If the test results entered do not fall within the required specifications, the system highlights the results in red with an asterisk (*) to flag the failed test result.

Exercise 6

In this exercise, open LIMS, create and apply a filter, and enter test results into a material test template.

User ID jj00001 Password pass
Connection Training Server
Group Name FIELD – Operations Inspector [INSP]
Prior Keys Not applicable.
Scenario The FIELD - Operations Inspector at the plant enters the test results into the T255 - Total Evaporable Moisture of Aggregate by Drying and T27 - Sieve Analysis of Fine and Coarse Aggregates test templates.

1. On the toolbar, click the Open LIMS button. The system launches the LIMS component.

2. On the Navigation Panel, double-click the Enter Test Results icon. LIMS displays the Enter Results window.

3. In the Test Queue Criteria area, note that the All My Lab Units choice has been selected.

4. In the Filter Criteria area, create a filter where Sample ID Contains 102054.

5. Click the Apply button. The system displays the tests associated to sample jj0000115AD102054 for the FIELD - Operations Inspector to perform in the TDOT Contractor Lab.
Enter the test results for the T255 test.

6. In the **Test Description** column, select the row for **T255 - Total Evaporable Moisture of Aggregate by Drying**.
   The system displays the material test template in the lower pane or Test Data window.

7. On the Test Data window, click the **Maximize** button to view more of the template at once.

![Maximize button](image)

Figure 13. LIMS - Enter Test Results Window - Test Data - Maximize Button - Detail

8. Complete the following fields on the template with the values provided.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample Weight (A)</td>
<td>6575.5</td>
</tr>
<tr>
<td>Sample Weight (oven dry) (B)</td>
<td>6290.0</td>
</tr>
</tbody>
</table>

**Tip!** After entering results, press the Tab key to move from field to field and to prompt the template to calculate the moisture content.

9. What is the percentage of moisture content? ____________
10. On the Test Data window, click the **Restore Down** button or drag/resize the test template back to the bottom pane.

![Restore Down button](image)

Figure 15. LIMS – Enter Test Results Window – Test Data – Restore Down Button – Detail

11. **Save**.

12. Note that the test results are no-spec.

13. In the **Test Completed** column, select the check box.

14. **Save**. The system removes the test from the queue.
Enter the test results for the T27 test.

15. For sample ID jj0000115AD102054, in the Test Description column, select the row for **T27 – Sieve Analysis of Fine and Coarse Aggregate**. The system displays the material test template in the lower pane or Test Data window.

16. On the Test Data window, click the Maximize button to view more of the template at once.

![Figure 10. LIMS – Enter Test Results Window – Test Data – Detail](image-url)
17. Complete the following fields on the template with the values provided.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Weight</td>
<td>2500.0</td>
</tr>
<tr>
<td>1.5000 in (1 1/2)</td>
<td>0.0</td>
</tr>
<tr>
<td>1.0000 in (1)</td>
<td>0.0</td>
</tr>
<tr>
<td>0.7500 in (3/4)</td>
<td>800.0</td>
</tr>
<tr>
<td>0.3750 in (3/8)</td>
<td>1000.0</td>
</tr>
<tr>
<td>No. 004</td>
<td>1500.0</td>
</tr>
<tr>
<td>No. 016</td>
<td>2000.0</td>
</tr>
<tr>
<td>No. 100</td>
<td>22235.0</td>
</tr>
<tr>
<td>Pan Weight</td>
<td>2498.3</td>
</tr>
<tr>
<td>% Moisture at Plant</td>
<td>4.5</td>
</tr>
<tr>
<td>Remarks</td>
<td>QC notified</td>
</tr>
</tbody>
</table>

18. On the Test Data window, click the Restore Down button. TIP! ALWAYS RESTORE DOWN BEFORE SAVING.

19. Save.

20. Note that the test results are out-of-spec.

21. In the Test Completed column, select the check box.

22. Save. The system removes the test from the queue.

Clear the filter and close the window.

23. In the Filter Criteria area, to clear the filter, click the Reset button. The system displays the remaining tests in the queue.


You’ve opened LIMS, created and applied a filter, entered test results into a material test template, and marked them complete.
Reviewing Test Results

Use the Review Tests window to review template data for tests previously marked complete in the Enter Tests Results window. In this window, mark completed tests as Review Completed, Re-Queue or Order Retest.

- **Review Completed** - Indicates that the reviewer considers the test result data to be entered correctly, not necessarily that the test will satisfy sampling and testing requirements.

- **Re-Queue** - Sends test back to the Enter Test Results window for corrections.

- **Order Retest** – Cancels the current test and prompts the user to add additional tests to the sample record.

![Figure 16. Review Tests Window](image)

**Important!** If results for any test are out-of-spec (failing), the sample must be reviewed in the Review Samples window after marking all tests as Review Completed in the Review Tests queue.
Exercises 7

In this exercise, progress the test through the Review Tests queue.

User ID: jj00001
Password: pass
Connection: Training Server
Group Name: FIELD - Operations Inspector [INS]
Prior Keys: jj0000115AD102054 (sample ID)
Scenario: FIELD - Operations Inspector reviews the entered test results for all tests performed in a contractor's lab.


Create and apply a filter.

2. In the Filter Criteria area, create a filter where Sample ID Contains 102054.

3. Click the Apply button.

4. In the Sample ID column, verify that all rows pertain to sample record jj0000115AD102054.

Review the results for the T27 test.

5. For sample ID jj0000115AD102054, in the Test Description column, select T27 – Sieve Analysis of Fine and Coarse Aggregate.

6. In the Test Results window, notice that the system selected the Out of Spec indicator.

7. Confirm the results.

8. Note that the value entered in the No. 100 field should be 2235.0, not 22235.0.

Send the test record back to the Enter Test Results queue and provide a reason.

9. From the Supervisor Action dropdown list, select Re-Queue. The system displays the Remarks window to prompt the user for a reason the test is being requeued.

10. Click the Requeue remark type.
11. In the remark field, type

   10/13/2015 - B. Morgan - There was a typo when entering test results for No. 100.

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

13. Save. The system removes the test record from the Review Tests queue.


Open the Enter Test Results window.

15. On the Navigation Panel window, double-click the Enter Test Results icon. LIMS displays the Enter Results window.

16. In the Test Queue Criteria area, if not already selected, select All My Lab Units.

Create a filter.

17. In the Filter Criteria area, create a filter where Sample ID Contains 102054.

18. Click the Apply button. The system displays the results of the filter.

19. For sample ID jj0000115AD102054, in the Test Description column, select the row for T27 – Sieve Analysis of Fine and Coarse Aggregate. The system displays the material test template in the lower pane or Test Data window.

Make the necessary changes.

20. On the Test Data window, click the Maximize button to view more of the template at once.

21. In the No. 100 field, change the value to 2235.0.

22. On the Test Data window, click the Restore Down button.

23. Save.

Mark the T27 test complete.

24. In the Test Completed column, select the check box.

25. Save. The system removes the test from the queue.
Clear the filter.

26. In the Filter Criteria area, to clear the filter, click the Reset button. The system displays the remaining tests in the queue.

27. Close. The system displays the Navigation Panel window.

Review the test again and mark the T27 test review complete.


29. For sample ID jj0000115AD102054, in the Test Description column, select T27 – Sieve Analysis of Fine and Coarse Aggregate.

30. From the Supervisor Action dropdown list, select Review Completed.

31. Save. The system removes the test record from the Review Tests queue.

Review the test and mark the T255 test review complete.

32. For sample ID jj0000115AD102054, in the Test Description column, select T255 – Total Evaporable Moisture of Aggregate by Drying.

33. In the Test Results window, notice that the system selected the No Spec indicator.

34. Confirm the results.

35. From the Supervisor Action dropdown list, select Review Completed.

36. Save. The system removes the test record from the Review Tests queue.

Clear the filter.

37. In the Filter Criteria area, to clear the filter, click the Reset button. The system displays the remaining tests in the queue.

Prepare for the next exercise.

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

You’ve progressed the tests through the Review Tests queue.
Creating a Sample Record for Aggregate Field Density

Exercise 8

In this exercise, create a sample record of the material to be tested in the field.

User ID: jj00001
Password: pass
Connection: Training Server
Group Name: FIELD - Operations Inspector [INSP]
Prior Keys: jj0000115AD102054 (sample ID)
Scenario: Field – Operations Inspector creates a sample record for tests performed on density at the jobsite.

1. On the toolbar, click New. The system creates a new sample record.

2. In the Sample Date field, type < yesterday’s date >.

   Note: The Sample Date field should reflect the date the sample was taken.

3. On the Smpl Type dropdown list, select Acceptance.

4. On the Acpt Meth dropdown list, select Acceptance.

5. In the Material field, type 303.

6. Using the right mouse button, click on the Material field.

7. From the object menu, select the Filter Search choice.

8. In the Material Code column, double-click 303.01.001.

9. In the Sampler field, type jj00001.

10. Using the right mouse button, click on the P/S field.

11. From the object menu, select Search.

12. In the Producer Supplier Name column, double-click Rogers Group - Cookeville.
13. On the **Geog Area** dropdown list, select **Region 2 - Overton**.

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

14. In the **Repr Qty** field, type **1000**.

15. **Save**.

16. Record the sample ID: ________________________

Record the additional sample data.

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

18. In the **Smpld From** field, type **Roadway**.

19. **Save**.

Record the contract sample data

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

21. On the toolbar, click the **New** button. The system displays the Select Contract/Material Information window.

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

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

24. In the **Contract ID** column, double-click **TRN349**. The system displays information about the associated items.

25. In the **Item Code** column, select **303-01**.

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

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

27. **Save**.
Record the other sample data.

28. Click the Other tab. The system displays the Other panel.

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

30. For the Destination Lab, using the right mouse button, click on the ID field.

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

32. In the Destination Lab column, double-click DEST – TDOT Field Testing. The system closes the Search Window window.

33. Save.

Assign the necessary tests.

34. On the toolbar, click the Open Assign Tests button. The system displays the Assign Sample Tests window.

Note: The message on the window warns that assigning tests to the sample will lock the sample. If uncertain about the tests needed for the sample, click the Cancel button.

35. Click More.

Note: T310 - Nuclear Density/Moisture of Soil and Agg. is a default test so no further action is required.

36. Click Save Tests. The system closes the Assign Sample Tests window, makes the Open Assign Tests button unavailable, changes the sample status to Received, and displays the Basic Sample Data panel.

You’ve created a sample record and assigned tests.
Exercise 9

In this exercise, open LIMS, create and apply a filter, and enter test results into a material test template.

User ID jj00001 Password pass
Connection Training Server
Group Name FIELD – Operations Inspector [INSP]
Prior Keys < the sample ID created in the previous exercise >
Scenario FIELD – Operations Inspector enters test results for density.

1. On the toolbar, click the Open LIMS button. SiteManager launches the LIMS component.

2. On the Navigation Panel, double-click the Enter Test Results icon. LIMS displays the Enter Results window.

3. In the Test Queue Criteria area, note that the All My Lab Units choice has been selected.

4. In the Filter Criteria area, create a filter where Sample ID Contains < the last 6 digits of the sample ID created in the last exercise >.

5. Click the Apply button. The system displays the tests associated to sample for the FIELD - Operations Inspector to perform in the field.
Enter the test results for the T310 test.

6. In the **Test Description** column, select the row for **T310 – Nuclear Density / Moisture of Soil and Agg**. The system displays the material test template in the lower pane or Test Data window.

7. On the Test Data window, click the **Maximize** button to view more of the template at once.

![T310 Nuclear Density / Moisture of Soil and Agg.](Image)

**Figure 17. LIMS - Enter Test Results Window - Test Data – Detail**

**Note:** The “No tests taken due to field conditions” check box should be selected when placing aggregates that don’t require tests such as maintenance stone, driveways, shoulders, and so on.
8. Complete the following fields on the template with the values provided.

<table>
<thead>
<tr>
<th>Lot #</th>
<th>1.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direction</td>
<td>NB</td>
</tr>
<tr>
<td>Width</td>
<td>12.0</td>
</tr>
<tr>
<td>Method of Mixing</td>
<td>PUG</td>
</tr>
<tr>
<td>Required Average</td>
<td>100</td>
</tr>
<tr>
<td>Nuclear Gauge No.</td>
<td>14700079 – Nuclear Gauge (1707)</td>
</tr>
<tr>
<td>Lot Description</td>
<td>Mainline 95+00 to 150+00</td>
</tr>
<tr>
<td>Test No.</td>
<td>1</td>
</tr>
<tr>
<td>Station</td>
<td>100+00</td>
</tr>
<tr>
<td>Offset (ft from CL)</td>
<td>1</td>
</tr>
<tr>
<td>Lift/Feet Below Grade</td>
<td>2</td>
</tr>
<tr>
<td>Moisture Standard</td>
<td>12</td>
</tr>
<tr>
<td>Moisture Count</td>
<td>3</td>
</tr>
<tr>
<td>Test/Probe Depth (in.)</td>
<td>6.0</td>
</tr>
<tr>
<td>Density Standard Count</td>
<td>3,400</td>
</tr>
<tr>
<td>Density Count</td>
<td>0</td>
</tr>
<tr>
<td>Unit Weight Wet (pcf)</td>
<td>141.0</td>
</tr>
<tr>
<td>Moisture (pcf)</td>
<td>0.0</td>
</tr>
<tr>
<td>Cut Station</td>
<td>0</td>
</tr>
<tr>
<td>Proctor Sample ID</td>
<td>0</td>
</tr>
<tr>
<td>Proctor Density</td>
<td>141.0</td>
</tr>
<tr>
<td>Optimum Moisture</td>
<td>6.5</td>
</tr>
<tr>
<td>Test No.</td>
<td>2</td>
</tr>
<tr>
<td>Station</td>
<td>110+00</td>
</tr>
<tr>
<td>Offset (ft from CL)</td>
<td>3</td>
</tr>
<tr>
<td>Lift/Feet Below Grade</td>
<td>2</td>
</tr>
<tr>
<td>Moisture Count</td>
<td>3</td>
</tr>
<tr>
<td>Density Count</td>
<td>0</td>
</tr>
<tr>
<td>Unit Weight Wet (pcf)</td>
<td>141.0</td>
</tr>
<tr>
<td>Moisture (pcf)</td>
<td>0.0</td>
</tr>
<tr>
<td>Test No.</td>
<td>3</td>
</tr>
<tr>
<td>Station</td>
<td>120.0</td>
</tr>
<tr>
<td>Offset (ft from CL)</td>
<td>6</td>
</tr>
<tr>
<td>Lift/Feet Below Grade</td>
<td>2</td>
</tr>
<tr>
<td>Moisture Count</td>
<td>3</td>
</tr>
<tr>
<td>Density Count</td>
<td>0</td>
</tr>
<tr>
<td>Unit Weight Wet (pcf)</td>
<td>141.0</td>
</tr>
<tr>
<td>Moisture (pcf)</td>
<td>0.0</td>
</tr>
</tbody>
</table>
9. On the Test Data window, click the **Restore Down** button.

10. **Save**.

11. Note that the test results are in-spec.

12. In the **Test Completed** column, select the check box.

13. **Save**. The system removes the test from the queue.

Clear the filter and close the window.

14. In the **Filter Criteria** area, to clear the filter, click the **Reset** button. The system displays the remaining tests in the queue.

15. **Close**. The system displays the Navigation Panel window.

*You’ve opened LIMS, created and applied a filter, entered test results into a material test template, and marked it complete.*
Exercise 10

In this exercise, progress the test through the Review Tests queue.

User ID jj00001  Password pass
Connection Training Server
Group Name FIELD - Operations Inspector [INSP]
Prior Keys < the sample ID used in the previous exercise >
Scenario Field – Operations Inspector reviews the tests results for density.


2. In the Filter Criteria area, create a filter where Sample ID Contains < the last 6 digits of the sample ID created in the last exercise >.

3. Click the Apply button.

Review the results for the T310 test.

4. In the Test Description column, select T310 – Nuclear Density / Moisture of Soil and Agg.

5. In the Test Results window, notice that the system selected the In Spec indicator.

6. Confirm the results.

7. From the Supervisor Action dropdown list, select Review Completed.

8. Save. The system removes the test record from the Review Tests queue.
Clear the filter and close the window.

9. In the **Filter Criteria** area, to clear the filter, click the **Reset** button. The system displays the remaining tests in the queue.

10. **Close**. The system displays the Navigation Panel window.

11. **Exit SiteManager LIMS**. The system displays the Maintain Sample Information window’s Basic Sample Data panel.

12. From the **File** menu, select the **Refresh** choice. The system refreshes the record to display the updated status after auto-finalizing the sample.

*You’ve progressed the test through the Review Tests queue.*
Review Exercise for Aggregate Field Density

In this exercise, create a sample record of an aggregate sample for a density test.

User ID jj00001 Password pass
Connection Training Server
Group Name FIELD - Operations Inspector [INSP]
Prior Keys Not applicable.
Scenario FIELD - Operations Inspector overseeing the installation of aggregate base material performs density tests with a nuclear gauge.

1. Create a new sample with the following information:

   Note: The step-by-step instruction has been removed.

<table>
<thead>
<tr>
<th>Sample Date</th>
<th>10/21/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smpl Type</td>
<td>Acceptance</td>
</tr>
<tr>
<td>Acpt Meth</td>
<td>Acceptance</td>
</tr>
<tr>
<td>Material</td>
<td>303.01.001 - Base (Mineral Aggregate, Type A)</td>
</tr>
<tr>
<td>Sampler</td>
<td>jj00001</td>
</tr>
<tr>
<td>Geog Area</td>
<td>Region 2 - Overton</td>
</tr>
<tr>
<td>Contract ID</td>
<td>TRN349</td>
</tr>
<tr>
<td>Line Item Desc</td>
<td>MINERAL AGGREGATE, TYPE A BASE, GRADING D</td>
</tr>
<tr>
<td>Destination Lab</td>
<td>DEST - TDOT Field Testing</td>
</tr>
<tr>
<td>Test to be Assigned</td>
<td>T310 - Nuclear Density/Moisture of Soil &amp; Agg</td>
</tr>
</tbody>
</table>

2. View the test results entered for a similar sample, jj000011485164900.

3. Mark the T310 test complete on sample jj000011485164900.

You’ve created a sample record of an aggregate sample for a density test, viewed test results and marked the test complete.
Review Exercise for Aggregate at the Plant

In this exercise, create a sample record of an aggregate sample for a density test.

User ID: jj00001
Connection: Training Server
Group Name: FIELD - Operations Inspector [INSP]
Prior Keys: Not applicable.

1. Create a new sample with the following information:

   **Note:** The step-by-step instruction has been removed.

<table>
<thead>
<tr>
<th>Sample Date</th>
<th>10/21/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smpl Type</td>
<td>Acceptance</td>
</tr>
<tr>
<td>Acpt Meth</td>
<td>Acceptance</td>
</tr>
<tr>
<td>Material</td>
<td>303.01.001 - Base (Mineral Aggregate, Type A)</td>
</tr>
<tr>
<td>Sampler</td>
<td>jj00001</td>
</tr>
<tr>
<td>P/S</td>
<td>Livingston Limestone</td>
</tr>
<tr>
<td>Geog Area</td>
<td>Region 2 - Overton</td>
</tr>
<tr>
<td>Contract ID</td>
<td>TRN349</td>
</tr>
<tr>
<td>Line Item Desc</td>
<td>MINERAL AGGREGATE, TYPE A BASE, GRADING D</td>
</tr>
<tr>
<td>Destination Lab</td>
<td>DEST - TDOT Contractor Lab</td>
</tr>
<tr>
<td>Test to be Assigned</td>
<td>T255 – Total Evaporable Moisture of Aggregate by Drying</td>
</tr>
</tbody>
</table>

2. On the Enter Test Results window, view the test results entered for a similar sample, jj00111671134306.

3. Mark the T27 and T255 tests complete on sample jj000111671134306.

4. If you created a filter, reset it.

5. **Exit SiteManager LIMS and Exit SiteManager.**

   You’ve created a sample record of an aggregate sample for plant tests, viewed test results and marked the tests complete.

---

**IMPORTANT!**

THE 11TH CHARACTER IN THE SAMPLE ID, jj00111671134306, IS A CAPITAL LETTER ‘I,’ NOT THE NUMBER ‘1.’

**TIP!**

CREATE A FILTER WHERE SAMPLE ID CONTAINS 134306.
Creating and Completing a Sample Record for Asphalt at the Plant

Exercise 11

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

User ID: jj00001  
Password: pass  
Connection: Training Server  
Group Name: FIELD – Operations Inspector [INSP]  
Prior Keys: Not applicable.  
Scenario: Yesterday, the FIELD - Operations Inspector sampled asphalt mix from a truck at the asphalt plant and performed the necessary tests in the contractor's lab, but did not have time to create the sample record. Today, the inspector creates the sample record in SiteManager.

1. Start and log onto SiteManager as user jj00001 while connected in server mode.

2. On the Main Panel, double-click the Materials Management icon.


4. On the Sampling and Testing panel, double-click the Sample Information icon. SiteManager displays the Maintain Sample Information window.

5. Create a sample record with the following information on the Basic Sample Data panel:

<table>
<thead>
<tr>
<th>Sample Date</th>
<th>&lt;yesterday's date&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smpl Type</td>
<td>Acceptance</td>
</tr>
<tr>
<td>Acpt Meth</td>
<td>Acceptance</td>
</tr>
<tr>
<td>Material</td>
<td>411.03.001</td>
</tr>
<tr>
<td>Sampler</td>
<td>jj00001</td>
</tr>
<tr>
<td>P/S</td>
<td>Highways Inc. – Allgood Asphalt Mix</td>
</tr>
<tr>
<td>Geog Area</td>
<td>Region 2 - Overton</td>
</tr>
<tr>
<td>Repr Qty</td>
<td>1000.0</td>
</tr>
</tbody>
</table>
6. Record the sample ID: ____________________________

7. Record the following information on the Addtl Sample Data panel:

<table>
<thead>
<tr>
<th>Smpld From</th>
<th>Truck BB1, Rdm Nbr 67, Load 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Type</td>
<td>Marshall</td>
</tr>
<tr>
<td>Mix ID</td>
<td>2140075</td>
</tr>
<tr>
<td>Plant ID</td>
<td>27100005</td>
</tr>
</tbody>
</table>

8. Record the following information on the Contract panel:

<table>
<thead>
<tr>
<th>Contract</th>
<th>TRN349</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Code</td>
<td>411-01.10</td>
</tr>
</tbody>
</table>

**Important!** Do not enter a Represented Qty!

9. Record the following information on the Other panel:

<table>
<thead>
<tr>
<th>ID</th>
<th>DEST – TDOT Contractor Lab</th>
</tr>
</thead>
</table>

10. Add the following tests:

<table>
<thead>
<tr>
<th>Test Code</th>
<th>Test Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>D4867</td>
<td>Tensile Strength Ratio</td>
</tr>
<tr>
<td>M007</td>
<td>10 Minute Boil Test</td>
</tr>
<tr>
<td>M012</td>
<td>LOI / Loss On Ignition Test</td>
</tr>
<tr>
<td>T166-245</td>
<td>Bulk Specific Gravity, Stability and Flow</td>
</tr>
<tr>
<td>T209</td>
<td>Theoretical Maximum Specific Gravity of HMA</td>
</tr>
</tbody>
</table>

11. Click the **Save Tests** button.

*You’ve created an asphalt sample record at the plant.*
Exercise 12

In this exercise, open LIMS, create and apply a filter, and enter test results into material test templates.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00001</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Training Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>Not applicable.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scenario</td>
<td>The FIELD - Operations Inspector enters the results of the LOI / Loss On Ignition test into the M012 test template, the Asphalt Content by Extraction/Furnace test into the T164EI test template, and the AC Content and Sieve Analysis of Asphalt Mix test into the T27/30 test template.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

2. In the **Sample ID** column, click the column header. The system makes the Find field available.

3. In the **Find** field, type **95148**. The system selects the first row with that combination of numbers.

4. Did it select the sample record **jj00001144F095148**? _____

5. If **Yes**, continue.
   - If **No**, scroll to and select sample ID **jj00001144F095148**.

6. Click **OK**. The system displays the Basic Sample Data panel.

7. On the toolbar, click the **Open LIMS** button. SiteManager launches the LIMS component.

8. On the **Navigation Panel**, double-click the **Enter Test Results** icon. LIMS displays the Enter Results window.

9. In the **Test Queue Criteria** area, note that the **All My Lab Units** choice has been selected.

10. In the **Filter Criteria** area, create a filter where **Sample ID Contains 95148**.

11. Click the **Apply** button. The system displays the tests associated to sample **jj00001144F095148** for the FIELD - Operations Inspector to perform in the TDOT Contractor Lab.
**Note:** This is an instructor-created sample that includes D4867, M007, M012, T164EII-T308, T166-245, T209 and T27_30. It is not the sample created during the last exercise. Several of the templates have been completed and moved through the LIMS queues to save time.

Enter the test results for the M012 test.

12. In the **Test Description** column, select the row for **M012 - LOI / Loss On Ignition Test**. The system displays the material test template in the lower pane or Test Data window.

13. On the Test Data window, click the **Maximize** button to view more of the template at once.

![Figure 10. LIMS - Enter Test Results Window - Test Data - Detail](image)

14. Complete the following fields on the template with the values provided.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Crucibles</td>
<td>1</td>
</tr>
<tr>
<td>Mass Crucible and Sample (before ignition)</td>
<td>2723.3</td>
</tr>
<tr>
<td>Mass Crucible</td>
<td>1431.2</td>
</tr>
<tr>
<td>Mass Crucible and Sample (after ignition)</td>
<td>2612.2</td>
</tr>
<tr>
<td>Target LOI Value From Mix Design</td>
<td>6.3</td>
</tr>
</tbody>
</table>
15. On the Test Data window, click the **Restore Down** button.

16. **Save**.

17. Note that the test results are out-of-spec.

18. In the **Test Completed** column, select the check box.

19. **Save**. The system removes the test from the queue.

Enter the test results for the T164EII test.

20. In the **Test Description** column, select the row for **T164EII- T308 - Asphalt Content By Extraction/Furnace**. The system displays the material test template in the lower pane or Test Data window.

21. On the Test Data window, click the **Maximize** button to view more of the template at once.

Figure 12. LIMS - Enter Test Results Window - Test Data – Detail

22. Complete the following fields on the template with the values provided.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Equipment</strong></td>
<td>999999999 – Contractor’s Equipment</td>
</tr>
<tr>
<td><strong>Extraction or Furnace</strong></td>
<td>T164EII Extraction</td>
</tr>
<tr>
<td><strong>Wt. of Container</strong></td>
<td>600.0</td>
</tr>
<tr>
<td><strong>Wt. of Container + Sample</strong></td>
<td>2200.0</td>
</tr>
<tr>
<td><strong>Sample Weight</strong></td>
<td>1400.0</td>
</tr>
<tr>
<td><strong>Wt. of Filter Paper</strong></td>
<td>12.0</td>
</tr>
<tr>
<td><strong>Wt. of Filter Aid</strong></td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Wt. of Aggregate</strong></td>
<td>1560.0</td>
</tr>
<tr>
<td><strong>Wt. of Extracted Asphalt</strong></td>
<td>92.0</td>
</tr>
<tr>
<td><strong>TAC</strong></td>
<td>6.75</td>
</tr>
</tbody>
</table>
Wt. of Filter Paper 12.0
Wt. of Filter Aid 100.0
Filt Aid + Paper + (-200) Mtl 220.0
Wt. of Extracted Agg + Pan 1600.0
Wt. of Pan 200.0

23. On the Test Data window, click the **Restore Down** button.

24. **Save**.

Note that the test results are no-spec.

25. In the **Test Completed** column, select the check box.

26. **Save**. The system removes the test from the queue.

Finally, enter the test results for the T27_30 test.

27. In the **Test Description** column, select the row for **T27_30 - Sieve Analysis of Asphalt Mix**. The system displays the material test template in the lower pane or Test Data window.

28. On the Test Data window, click the **Maximize** button to view more of the template at once.

**WARNING! USERS MUST MANUALLY SELECT THE TEST STATUS IN THE TEMPLATE MONITOR FIELD FOR THIS TEMPLATE.**
29. Complete the following fields on the template with the values provided.

<table>
<thead>
<tr>
<th>Material</th>
<th>Weight Retained</th>
<th>Percent Passing</th>
<th>Percent Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.0000 in (2)</td>
<td>0 g</td>
<td>0.0 %</td>
<td>0.0 %</td>
</tr>
<tr>
<td>1.5000 in (1 1/2)</td>
<td>0 g</td>
<td>0.0 %</td>
<td>0.0 %</td>
</tr>
<tr>
<td>1.2500 in (1 1/4)</td>
<td>0 g</td>
<td>0.0 %</td>
<td>0.0 %</td>
</tr>
<tr>
<td>1.0000 in (1)</td>
<td>0 g</td>
<td>0.0 %</td>
<td>0.0 %</td>
</tr>
<tr>
<td>0.7500 in (3/4)</td>
<td>0 g</td>
<td>0.0 %</td>
<td>0.0 %</td>
</tr>
<tr>
<td>0.6250 in (5/8)</td>
<td>0 g</td>
<td>0.0 %</td>
<td>0.0 %</td>
</tr>
<tr>
<td>0.5000 in (1/2)</td>
<td>0 g</td>
<td>0.0 %</td>
<td>0.0 %</td>
</tr>
<tr>
<td>0.3750 in (3/8)</td>
<td>0 g</td>
<td>0.0 %</td>
<td>0.0 %</td>
</tr>
<tr>
<td>No. 004</td>
<td>470.0 g</td>
<td>52.8 %</td>
<td>87.8 %</td>
</tr>
<tr>
<td>No. 008</td>
<td>702.4 g</td>
<td>43.9 %</td>
<td>56.1 %</td>
</tr>
<tr>
<td>No. 016</td>
<td>941.9 g</td>
<td>22.1 %</td>
<td>77.3 %</td>
</tr>
<tr>
<td>No. 030</td>
<td>1034.5 g</td>
<td>17.3 %</td>
<td>82.7 %</td>
</tr>
<tr>
<td>No. 050</td>
<td>1151.6 g</td>
<td>7.9 %</td>
<td>92.1 %</td>
</tr>
<tr>
<td>No. 100</td>
<td>1180.6 g</td>
<td>5.8 %</td>
<td>94.4 %</td>
</tr>
</tbody>
</table>

Percent AC: 5.75 %
Pan Weight: 1185.6 g

TIP!

BE SURE TO TAB OUT OF THE INITIAL WEIGHT FIELD, THE WEIGHT RETAINED FIELDS WILL NOT BECOME EDITABLE UNTIL THE SYSTEM REGISTERS THE INITIAL WEIGHT VALUE.

BY DEFAULT, MATERIAL TEST TEMPLATES SHOW .0 IN SOME FIELDS WHEN NO VALUE HAS BEEN ENTERED. WHILE TESTING, IF A ZERO VALUE IS FOUND FOR A FIELD, USERS MUST TYPE 0.0 TO STORE THE VALUE IN THE SYSTEM AND PROPERLY PERFORM RELATED CALCULATIONS. THE TEMPLATE WILL CONTINUE TO DISPLAY .0 IN THE FIELD.
30. User should compare the information on T27/30 to the Job Mix Formula (JMF) for this contract to ensure the test results fall within the specified range.

31. **Warning!** The T27_30 - Sieve Analysis of Asphalt Mix template requires that the user manually select In Spec or Out of Spec to indicate the status of the recorded results. If any field label remains red after entering results, select Out of Spec.

32. In the **Template Monitor** field, manually select **In Spec**.

   **Note:** The system hides the “Upon entering results and before marking the testing complete, please select In Spec, Out of Spec or No Spec” text after selecting the status.

33. On the Test Data window, click the **Restore Down** button.

34. **Save**.

35. In the **Test Completed** column, select the check box.

36. **Save.** The system removes the test from the queue.

Clear the filter and close the window.

37. In the **Filter Criteria** area, to clear the filter, click the **Reset** button. The system displays the remaining tests in the queue.

38. **Close.** The system displays the Navigation Panel window.

*You’ve entered test results into material test templates and marked them complete.*
Using Reports

After entering results into the T27/30 test template, the RR061 BOE report, *Asphalt Plant Density*, can be run. This report is important because this is how Office Staff finds/calculates the AC content and gradations deduction which they “install” against the appropriate line item.

![BOE Report – Asphalt Plant Density (RR061)](image)

Figure 18. BOE Report – Asphalt Plant Density (RR061)
Other reports important to Operations in this area are the RR016 BOE report, *Mix Designs - Approved*, and the RR070 BOE report, *Job Mix Formula*.

Operations will use RR016 BOE report, *Mix Designs - Approved* to find the mix.

![Figure 19. BOE Report – Mixed Designs Approved (RR016) – (initial page)](image-url)
<table>
<thead>
<tr>
<th>Mix ID</th>
<th>Material</th>
<th>Producer/ Rippler</th>
<th>Approval Date</th>
<th>Termination Date</th>
<th>Associated Contracts</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCC</td>
<td>PCC</td>
<td>ISM 01.01A - Class A, Concrete Mix</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15:0581B</td>
<td>ISM 01.01A - Class A, Concrete Mix</td>
<td>Concrete Materials Inc - Montgomery Ready Mix</td>
<td>04/15/2015</td>
<td>12/31/2049</td>
<td>CN1223</td>
</tr>
<tr>
<td>MMB14 37E</td>
<td>ISM 01.01D - Class D, Concrete Mix</td>
<td>Sequatchie Concrete - South Pittsburg Ready Mix</td>
<td>04/15/2015</td>
<td>12/31/2049</td>
<td>CN1223</td>
</tr>
</tbody>
</table>

Figure 20. BOE Report – Mixed Designs Approved (RR016) – (final page)
Operations will run RR070 BOE report, *Job Mix Formula* to view the mix design details.

![Figure 21. BOE Report – Job Mix Formula (RR070)](image-url)
Exercise 13

In this exercise, progress the test through the Review Tests queue.

User ID: jj00001
Password: pass
Connection: Training Server
Group Name: FIELD - Operations Inspector [INSP]
Prior Keys: jj00001144F095148 (sample ID)
Scenario: FIELD - Operations Inspector reviews the entered test results for all tests performed in a contractor's lab or in the field.

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

2. In the **Filter Criteria** area, create a filter where **Sample ID Contains 95148**.

3. Click the **Apply** button.

4. In the **Sample ID** column, verify that all rows pertain to sample record jj00001144F095148.

Review the results for the D4867 test.

5. In the **Test Description** column, select **D4867 – Tensile Strength Ratio**.

6. In the Test Results window, notice that the system selected the **In Spec** indicator.

7. Is this sample a candidate to auto-finalize based on this test’s test results? _______________________

8. From the **Supervisor Action** dropdown list, select **Review Completed**. *The system will authorize this sample automatically if all tests for the sample are marked as Review Completed in the Review Tests queue if and only if all tests on this sample are set to auto-finalize and are in-spec or no-spec.*

9. **Save**. The system removes the test record from the Review Tests queue.

<table>
<thead>
<tr>
<th>THE SYSTEM WILL AUTHORIZE A SAMPLE AUTOMATICALLY IF IT MEETS THE FOLLOWING CONDITIONS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- ALL TESTS ARE MARKED AS REVIEW COMPLETED IN REVIEW TEST QUEUE</td>
</tr>
<tr>
<td>- ALL TESTS ARE SET TO AUTO-FINALIZE</td>
</tr>
<tr>
<td>- ALL TESTS ARE IN-SPEC OR NO-SPEC</td>
</tr>
</tbody>
</table>
Review the results for the T209 test.

10. In the **Test Description** column, select **T209 - Theoretical Maximum Specific Gravity of HMA**.

11. In the Test Results window, notice that the system selected the **No Spec** indicator.

12. Is this sample a candidate to auto-finalize based on this test’s test results? _______________________

13. From the **Supervisor Action** dropdown list, select **Review Completed**. *The system will authorize this sample automatically after all tests for the sample are marked as Review Completed in the Review Tests queue if and only if all tests on this sample are set to auto-finalize and are in-spec or no-spec.*

14. **Save**. The system removes the test record from the Review Tests queue.

Review the results for the M007 test.

15. In the **Test Description** column, select **M007 – 10 Minute Boil Test**.

16. In the Test Results window, notice that the system selected the **Out of Spec** indicator.

17. Is this sample a candidate to auto-finalize based on this test’s test results? _______________________

18. From the **Supervisor Action** dropdown list, select **Review Completed**. *Since the test results for M007 are out-of-spec, this sample record will not auto-finalize. All test results must pass before a sample record will auto-finalize.*

19. **Save**. The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.
Review the results for the T166-T245 test.

20. In the Test Description column, select T166-245 - Bulk Specific Gravity, Stability and Flow.

21. In the Test Results window, notice that the system selected the In Spec indicator.

22. From the Supervisor Action dropdown list, select Review Completed.

23. Save. The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.

Review the results for the M012 test.

24. In the Test Description column, select M012 – LOI / Loss On Ignition Test.

25. In the Test Results window, does the template indicate that the test results are in-spec, out-of-spec or no-spec? ________________

26. From the Supervisor Action dropdown list, select Review Completed.

27. Save. The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.

Review the results for the T164EII-T308 test.

28. In the Test Description column, select T164EII-T308 - Asphalt Content By Extraction/Furnace.

29. In the Test Results window, does the template indicate that the test results are in-spec, out-of-spec or no-spec? ________________

30. From the Supervisor Action dropdown list, select Review Completed.

31. Save. The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.
Review the results for the T27_30 test.

32. In the **Test Description** column, select
   **T27_30 – Sieve Analysis of Asphalt Mix**.

33. In the Test Results window, does the template indicate that the test results are in-spec, out-of-spec or no-spec? ____________

34. From the **Supervisor Action** dropdown list, select **Review Completed**.

35. **Save**. The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.

Clear the filter and prepare for the next exercise.

36. In the **Filter Criteria** area, click the **Reset** button.

37. **Close**. The system displays the Navigation Panel.

*You’ve progressed the tests through the Review Tests queue.*
Authorizing Samples

Use the Review Samples window to authorize samples. In this window, authorize the sample while verifying the acceptance method and providing the appropriate sample status.

![Review Samples Window](image.png)

**Exercise 14**

In this exercise, authorize the sample record in the Review Samples queue.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
<td>pass</td>
</tr>
<tr>
<td>Connection</td>
<td>Training Server</td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
</tr>
<tr>
<td>Prior Keys</td>
<td>jj00001144F095148 (sample ID)</td>
</tr>
<tr>
<td>Scenario</td>
<td>FIELD - Operations Inspector authorizes the sample.</td>
</tr>
</tbody>
</table>

Review the sample record to authorize the sample that did not auto-finalize because of out-of-spec results.

1. On the **Navigation Panel**, double-click the **Review Samples** icon. The system displays the Review Samples window.

   **Note:** There is no need to apply a filter. This is the only sample available to review.

2. In the **Authorize** column, select the checkbox.

3. In the **Sample Status** column, from the dropdown list, select **Failed, but Left in Place**.
SAMPLE STATUS DESCRIPTIONS INCLUDE:

- **COMP - COMPLETED** - TESTS PASSED AND SAMPLE WILL COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.
- **CNTR - COMPLETED, WITH NO TESTS REQUIRED** – NO TESTS WERE INVOLVED, BUT SAMPLE WILL COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.
- **FLIP - FAILED, BUT LEFT IN PLACE** - TESTS FAILED, BUT THE MATERIALS WERE LEFT IN PLACE. SAMPLE STATUS WILL COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.
- **FAIL - FAILED** - TESTS FAILED AND SAMPLE WILL NOT COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.
- **VOID - VOIDED** - NOT USING THE SAMPLE. SAMPLE WILL NOT COUNT TOWARDS SAMPLE AND TESTING REQUIREMENTS.

4. **Save.** The system clears all test records for the selected sample record from the Review Samples queue.

   **Tip!** To view the sample and test results now, use the View-Only Sample Information window, the Maintain Sample Information window, or the *Sample Details and Tests Results Report* (a custom report).

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

   *You’ve authorized the sample in the Review Samples queue.*

**Viewing Test Results and Sample Records at Any Time**

Although the following methods can be used at any time during the lifecycle of a test, after the test and sample record goes through all of the LIMS queues, these are the only ways to view test results:

- **In SiteManager,** Maintain Sample Information window’s Tests panel > Services menu > Enter/View Test Data
- **In LIMS,** View-Only Sample Information window’s Test Results panel
- **In BOE,** Report RR012 – *Sample Details and Test Results*
Exercise 15

In this exercise, view test results from the View-Only Sample Information window and the Maintain Sample Information window.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00001</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Training Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>jj00001144F095148 (sample ID)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scenario</td>
<td>FIELD - Operations Inspector views test results.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

View test results from the View-Only Sample Information window’s Test Results panel.

1. In LIMS, on the Navigation Panel window, double-click the View-Only Sample Information icon. The system displays the Open Sample Records window.

   ![View-Only Sample Information Window – Open Sample Records](image)

   Figure 23. View-Only Sample Information Window – Open Sample Records

2. In the Filter area, click the New Filter button. The system displays a Save New Filter As window.

3. In the Save New Filter As field, type Sample ID Contains.

4. Click OK.

5. Click the Add Criteria button. The system displays a blank row.

6. In the Field dropdown list, select Sample ID.
7. In the **Operator** dropdown list, select **Contains**.

8. In the **Value** field, type **95148**.

9. Click the **Open Records** button.

10. In the **Sample ID** column, verify that the system displayed the **jj00001144F095148** sample.

11. Click the **Test Results** tab. The system displays the Test Results panel.

12. View all test results for the sample in grid view.

<table>
<thead>
<tr>
<th>Sample Details</th>
<th>Contract Details</th>
<th>Other Details</th>
<th>Sample Receive</th>
<th>Tests Assigned</th>
<th>Test Status</th>
<th>Test Results</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Test Template</strong></td>
<td><strong>Template Column</strong></td>
<td><strong>Min</strong></td>
<td><strong>Max</strong></td>
<td><strong>jj00001144F095148</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Spec Status(N+1 OUT=2 NONE=0)</td>
<td>in Spec.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Remarks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Composition Method</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Efflux</td>
<td>3.1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Max Specific Gravity</td>
<td>2.582</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Diameter PM1</td>
<td>4.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Thickness PM1</td>
<td>2.56</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Dry mass in PM1</td>
<td>1215.3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>SSD mass PM1</td>
<td>1221.2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Mass in water PM1</td>
<td>706.8</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Bulk Sp. Gr. PM1</td>
<td>2.303</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>% Air Void PM1</td>
<td>6</td>
<td>8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Condition Specimen PM1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Saturated SSD Mass PM1</td>
<td>1236.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>%Saturation PM1</td>
<td>0</td>
<td>90</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Conditioned Thickness PM1</td>
<td>2.50</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Cond Thickness PM1 Comp</td>
<td>9.99</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Conditioned SSD Mass PM1</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Cond Mass in Water PM1</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DA867</td>
<td>Load PM1</td>
<td>21.59</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 24. View-Only Sample Information Window – Test Results Panel

13. **Exit SiteManager LIMS.**

14. The system displays the Maintain Sample Information window.
View test results from the Maintain Sample Information window’s Tests panel.

15. In SiteManager, on the Maintain Sample Information window, click the **Tests** tab. The system displays the Tests panel.

16. In the **Test Method** column, select **D4867**.

17. From the **Services** menu, select **Enter/View Test Data**. The system displays the Material Test Template Usage window.

![Material Test Template Usage Window](image)

**Figure 25.** Material Test Template Usage Window

18. Scroll to view the test results.

19. **Close**. The system displays the Maintain Sample Information window’s Tests panel.

20. **Close**. The system displays the Sampling and Testing panel.

*You’ve viewed test results from the Maintain Sample Information window.*
Locating Sample Records in SiteManager

Besides the basic filter, sort and find features available from many windows, use the Find Sample Parameters window to search for sample records based on specific criteria. This window provides the option to display a list of sample records based on any combination of the following fields: Geographic Area, Sampled By, Material Code, Producer/Supplier Code, Sample Date, Contract ID (then by Project or Proposal Line Nbr and then by Line Item), and Item Code.

Figure 26. Find Sample Icon

Figure 27. Find Sample Parameters Window

Figure 28. Find Samples Window
Exercise 16

In this exercise, find a sample record.

User ID: jj00001
Password: pass
Connection: Training Server
Group Name: FIELD - Operations Inspector [INSP]
Prior Keys: Not Applicable
Scenario: FIELD - Operations Inspector locates all sample records for material code 411.03.001 where Bailey Morgan was the sampler.

1. On the Sampling and Testing panel, double-click the Find Sample icon. The system displays the Find Sample Parameters window.

2. Click the Sampled By checkbox. The system makes the Sampled By field searchable.

Add criteria.

3. In the Sampled By field, right-click and select Search. The system displays the Search Window window.

4. In the Inspector Name column, double-click Morgan, Bailey.

5. Click the Material Code checkbox. The system makes the Material Code field searchable.

6. In the Material Code field, right-click and select Search. The system displays the Search Window window.

7. To sort the list, click the Material Code column header.

8. In the Material Code column, scroll to and double-click 411.03.001.

9. Click OK. The system displays the Find Samples window with a list of the sample records that meet the specified criteria.
View the sample record.

10. In the **Sample ID** column, select **jj00001144F095148**.

   **Note:** Double-clicking the row does not open the record as in other windows.

11. From the **Services** menu, select **View Sample**. The system displays the desired sample record in the Maintain Sample Information window.

   *You’ve found all the sample records for samples of a material and sampled by an inspector.*
Creating a Sample Record for Asphalt Field Density

Exercise 17

In this exercise, create a sample record, assign tests, enter test results and review the tests.

User ID: jj00001
Password: pass
Connection: Training Server
Group Name: FIELD - Operations Inspector [INSP]
Prior Keys: jj00001144F095148
Scenario: Asphalt material has been tested at the plant, delivered to job site and placed. FIELD – Operations Inspector has performed the density test and will now enter sample record and test results.

1. On the toolbar, click New.

2. Create a sample record with the following information:

<table>
<thead>
<tr>
<th>Smpl Type</th>
<th>Acceptance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acpt Meth</td>
<td>Acceptance</td>
</tr>
<tr>
<td>Material</td>
<td>411.03.001 (411-D Bit PM, PG64-22)</td>
</tr>
<tr>
<td>Sampler</td>
<td>jj00001</td>
</tr>
<tr>
<td>P/S</td>
<td>Livingston Limestone</td>
</tr>
<tr>
<td>Repr Qty</td>
<td>1437</td>
</tr>
<tr>
<td>Geog Area</td>
<td>Region 2 - Overton</td>
</tr>
<tr>
<td>Contract ID</td>
<td>TRN349</td>
</tr>
<tr>
<td>Line Item Desc</td>
<td>ACS MIX(PG-6422) GRADING D</td>
</tr>
<tr>
<td>Destination Lab</td>
<td>DEST - TDOT Field Testing</td>
</tr>
<tr>
<td>Test to be Assigned</td>
<td>D2950 - Density of Bituminous Conc in Place by Nuclear Meth</td>
</tr>
</tbody>
</table>

3. Record the sample ID: ____________________________
4. Complete the following fields on the template with the values provided.

<table>
<thead>
<tr>
<th>Equipment</th>
<th>14700078 – Nuclear Gauge (1706)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of Lots</td>
<td>1</td>
</tr>
<tr>
<td>Standard Count</td>
<td>2672</td>
</tr>
<tr>
<td>Theoretical or Laboratory Density (lb/cu ft)</td>
<td>159.1</td>
</tr>
<tr>
<td>Core Correction</td>
<td>9.0</td>
</tr>
<tr>
<td>Percent Required Density</td>
<td>92.0</td>
</tr>
<tr>
<td>Patching or Turnouts</td>
<td>0.00</td>
</tr>
<tr>
<td>Lot No.</td>
<td>1</td>
</tr>
<tr>
<td>From Sta</td>
<td>0+00</td>
</tr>
<tr>
<td>To Sta</td>
<td>46+00</td>
</tr>
<tr>
<td>Lin M (ft)</td>
<td>4600</td>
</tr>
<tr>
<td>Width</td>
<td>12</td>
</tr>
<tr>
<td>Lift</td>
<td>1</td>
</tr>
<tr>
<td>Lane</td>
<td>NB</td>
</tr>
<tr>
<td>Test No.</td>
<td>1</td>
</tr>
<tr>
<td>Sta No.</td>
<td>6+18</td>
</tr>
<tr>
<td>Location</td>
<td>L,EL</td>
</tr>
<tr>
<td>Den Count</td>
<td>660</td>
</tr>
<tr>
<td>Den Kg/m3 (lb/ft3)</td>
<td>138.2</td>
</tr>
<tr>
<td>Test No.</td>
<td>2</td>
</tr>
<tr>
<td>Sta No.</td>
<td>11+18</td>
</tr>
<tr>
<td>Location</td>
<td>R,WP</td>
</tr>
<tr>
<td>Den Count</td>
<td>655</td>
</tr>
<tr>
<td>Den Kg/m3 (lb/ft3)</td>
<td>138.7</td>
</tr>
<tr>
<td>Test No.</td>
<td>3</td>
</tr>
<tr>
<td>Sta No.</td>
<td>24+82</td>
</tr>
<tr>
<td>Location</td>
<td>Cent</td>
</tr>
<tr>
<td>Den Count</td>
<td>628</td>
</tr>
<tr>
<td>Den Kg/m3 (lb/ft3)</td>
<td>141.1</td>
</tr>
<tr>
<td>Test No.</td>
<td>4</td>
</tr>
<tr>
<td>Sta No.</td>
<td>36+00</td>
</tr>
<tr>
<td>Location</td>
<td>L,WP</td>
</tr>
<tr>
<td>Den Count</td>
<td>650</td>
</tr>
<tr>
<td>Den Kg/m3 (lb/ft3)</td>
<td>139.2</td>
</tr>
<tr>
<td>Test No.</td>
<td>5</td>
</tr>
<tr>
<td>---------</td>
<td>---</td>
</tr>
<tr>
<td>Sta No.</td>
<td>45+10</td>
</tr>
<tr>
<td>Location</td>
<td>R,EL</td>
</tr>
<tr>
<td>Den Count</td>
<td>665</td>
</tr>
<tr>
<td>Den Kg/m3 (lb/ft3)</td>
<td>137.5</td>
</tr>
<tr>
<td>Lot Averages</td>
<td>132.5</td>
</tr>
</tbody>
</table>

5. **Save**

6. In the **Test Completed** column, select the check box.

7. **Save**.

8. If applicable, reset the filter.

9. **Close**. The system closes the Enter Test Results window and displays the Navigation Panel window.


11. Review test and select **Review Completed** from the **Supervisor Action** dropdown list.

12. **Save**.

13. **Close**. The system closes the Review Tests window and displays the Navigation Panel window.

*You’ve run density in the field and recorded them in SiteManager and LIMS.*
Review Exercise for Asphalt at the Plant

In this exercise, enter test results for the AC Content and Sieve Analysis of Asphalt Mix into the T27_30 test template and manually select the test template status.

User ID jj00001
Password pass
Connection Training Server
Group Name FIELD - Operations Inspector [INSP]
Prior Keys jj00001144F095148
Scenario The FIELD - Operations Inspector at the plant enters the test results into the T27_30 - Sieve Analysis of Asphalt Mix by extracting the AC and running a gradation.

1. Open the Enter Test Results window.
2. Locate the T27_30 test on sample jj00001167I143455.
3. Complete the following fields on the template with the values provided.

<table>
<thead>
<tr>
<th>Initial Weight</th>
<th>1251.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weight Retained</td>
<td>0.6250 in ( 5/8 )</td>
</tr>
<tr>
<td>Weight Retained</td>
<td>0.5000 in ( 1/2 )</td>
</tr>
<tr>
<td>Weight Retained</td>
<td>0.3750 in ( 3/8 )</td>
</tr>
<tr>
<td>Weight Retained</td>
<td>No. 004</td>
</tr>
<tr>
<td>Weight Retained</td>
<td>No. 008</td>
</tr>
<tr>
<td>Weight Retained</td>
<td>No. 030</td>
</tr>
<tr>
<td>Weight Retained</td>
<td>No. 050</td>
</tr>
<tr>
<td>Weight Retained</td>
<td>No. 100</td>
</tr>
<tr>
<td>Weight Retained</td>
<td>No. 200</td>
</tr>
<tr>
<td>Percent AC</td>
<td>5.75</td>
</tr>
<tr>
<td>Pan Weight</td>
<td>1185.6</td>
</tr>
</tbody>
</table>

IMPORTANT!
The 11th character in the SAMPLE ID, jj00001167I143455, is a capital letter 'I,' NOT the number '1.'

TIP!
CREATE A FILTER WHERE SAMPLE ID CONTAINS 143455.
4. Are the results **In Spec** or **Out of Spec**? ______________

5. In the **Template Monitor** field, manually select the appropriate status.

6. **Save**.

7. In the **Test Completed** column, select the check box.

8. **Save**. The system removes the test from the queue.

9. If applicable, reset the filter.

10. **Exit SiteManager LIMS**.

11. Minimize the SiteManager application.

   *You’ve run AC content and a sieve analysis in the field.*
Review Exercise for Asphalt Field Density

In this exercise, enter the test results for the D2950 test.

User ID: jj00001
Password: pass
Connection: Training Server
Group Name: FIELD - Operations Inspector [INSP]
Scenario: FIELD - Operations Inspector overseeing the installation of soil base material performs density tests with a nuclear gauge.

1. Log onto LIMS directly (bypassing SiteManager).
2. Open the Enter Test Results window.
3. Create a filter to display the D2950 test on the jj00001167I143845 sample.
4. Complete the following fields on the template with the values provided.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>14700072 – Nuclear Gauge (63247)</td>
</tr>
<tr>
<td>No. of Lots</td>
<td>1</td>
</tr>
<tr>
<td>Standard Count</td>
<td>2672</td>
</tr>
<tr>
<td>Theoretical or Laboratory Density (lb/cu ft)</td>
<td>158.2</td>
</tr>
<tr>
<td>Core Correction</td>
<td>8.9</td>
</tr>
<tr>
<td>Percent Required Density</td>
<td>91.0</td>
</tr>
<tr>
<td>Patching or Turnouts</td>
<td>0.00</td>
</tr>
<tr>
<td>Lot No.</td>
<td>1</td>
</tr>
<tr>
<td>From Sta</td>
<td>0+00</td>
</tr>
<tr>
<td>To Sta</td>
<td>45+00</td>
</tr>
<tr>
<td>Lin M (ft)</td>
<td>4500</td>
</tr>
<tr>
<td>Width</td>
<td>12</td>
</tr>
<tr>
<td>Lift</td>
<td>1</td>
</tr>
<tr>
<td>Lane SB</td>
<td></td>
</tr>
<tr>
<td>Test No.</td>
<td>1</td>
</tr>
<tr>
<td>Sta No.</td>
<td>6+18</td>
</tr>
<tr>
<td>Location L,EL</td>
<td></td>
</tr>
<tr>
<td>Den Count</td>
<td>660</td>
</tr>
<tr>
<td>Den Kg/m3 (lb/ft3)</td>
<td>135.2</td>
</tr>
<tr>
<td>Test No.</td>
<td>2</td>
</tr>
<tr>
<td>Sta No. 11+118</td>
<td></td>
</tr>
<tr>
<td>Location R,WP</td>
<td></td>
</tr>
<tr>
<td>Den Count</td>
<td>655</td>
</tr>
<tr>
<td>Den Kg/m3 (lb/ft3)</td>
<td>138.7</td>
</tr>
</tbody>
</table>

IMPORTANT!
THE 11TH CHARACTER IN THE SAMPLE ID, jj00001167I143845, IS A CAPITAL LETTER ‘I,’ NOT THE NUMBER ‘1.’

TIP!
CREATE A FILTER WHERE SAMPLE ID CONTAINS 14384.
<table>
<thead>
<tr>
<th>Test No.</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sta No.</td>
<td>24+82</td>
</tr>
<tr>
<td>Location</td>
<td>Cent</td>
</tr>
<tr>
<td>Den Count</td>
<td>628</td>
</tr>
<tr>
<td>Den Kg/m3 (lb/ft3)</td>
<td>136.4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Test No.</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sta No.</td>
<td>36+00</td>
</tr>
<tr>
<td>Location</td>
<td>L,WP</td>
</tr>
<tr>
<td>Den Count</td>
<td>650</td>
</tr>
<tr>
<td>Den Kg/m3 (lb/ft3)</td>
<td>139.2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Test No.</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sta No.</td>
<td>45+10</td>
</tr>
<tr>
<td>Location</td>
<td>R,EL</td>
</tr>
<tr>
<td>Den Count</td>
<td>665</td>
</tr>
<tr>
<td>Den Kg/m3 (lb/ft3)</td>
<td>137.5</td>
</tr>
<tr>
<td>Lot Averages</td>
<td>132.5</td>
</tr>
</tbody>
</table>

5. Save.

6. Mark the test completed.

7. Save. The system removes the test from the queue.

8. Reset the filter.

9. Exit SiteManager LIMS.

You’ve recorded the asphalt field density test results.
Creating Sample Records for Concrete from Daily Work Report Items

Use the Material Inspection Detail window to view component materials, associated test methods, and more information about contract sampling and testing, including the option to create and view samples linked to a DWR item.

Figure 29. Material Inspection Detail Window
Exercise 18

In this exercise, create a sample record from a DWR item.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00001</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Training Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>Not Applicable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scenario</td>
<td>FIELD - Operations Inspector prepares to pour a concrete bridge deck. Loads of concrete arrive at the job site. FIELD - Operations Inspector samples the first three loads and tests for air, slump and temperature.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Use the item recorded on the DWR to create a concrete sample record for the air, slump and temperature tests and enter the test results.

1. Restore the SiteManager application. The system displays the Maintain Sample Information window and the last sample record created.
2. Close. The system closes the Maintain Sample Information window and displays the SiteManager Panel window.
3. Click the Main Panel tab. The system displays the Main Panel panel.
4. Double-click the Daily Work Reports icon. The system displays the Daily Work Reports panel.
5. Double-click the Daily Work Reports icon. The system displays the Daily Work Reports window.
6. On the toolbar, click the Open button. The system displays the Contract ID window.
7. In the Contract ID area, in the Contract ID column, double-click TRN349. The system displays the Inspector area.
8. In the User ID column, double-click jj00001. The system displays the DWR Date area.

Tip! To create a sample record from a DWR item, users must use their own DWR.
9. In the DWR Date column, double-click 09/24/14. The system displays the DWR Info panel with information about the selected DWR.
10. Click the **Work Items** tab. The system displays the Work Items panel.

    **Tip!** By default, the system sorts installed items to the top.

11. In the **Description** column, double-click **CLASS A CONCRETE (BOX BRIDGES)**.

Select the item’s component material for the sample record.

12. On the toolbar, click the **Open Material Inspection Detail Window** button. The system displays the Material Inspection Detail window.

![](image.png)

Figure 30. Daily Work Reports Window - Toolbar - Button Detail

13. In the middle pane, in the **Material Component** column, select **Class A Concrete**.

Create the sample record.

14. On the toolbar, click the **Create Sample for Selected Material** button. The system displays the Maintain Sample Information window with the material information already populated.

![](image.png)

Figure 31. Material Inspection Detail Window - Toolbar - Button Detail

15. In the **Smpl Type** dropdown list, select **Acceptance**.

16. On the **Acpt Meth** dropdown list, select **Acceptance**.

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

18. Using the right mouse button, click on the **P/S** field.

19. From the object menu, select **Search**.

20. In the **Producer Supplier Name** column, double-click **IMI - Livingston Ready Mix**.

21. On the **Geog Area** dropdown list, select **Region 2 - Overton**.
22. In the **Intd Use** field, type **Box Culvert End Wall and Wings**.

23. In the **Repr Qty** field, type **9.000**.

24. **Save**.

25. Write the sample ID here: _________________________

**Complete the Addtl Sample Data panel.**

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

27. In the **Smpl Size** field, type **1**.

28. On the **Smpl Size Units** dropdown list, select **Cubic Yard(s)**.

29. In the **Dist from Grade** field type **0.0**.

30. In the **Dist from Grade Units** dropdown list, select **Foot/Feet**.

31. In the **Station** field, type **213+80**.

32. On the **Design Type** dropdown list, select **PCC**.

33. In the **Mix ID** field, type **714002**.

34. **Tab**.

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

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

37. In the **Plant ID** column, double-click **26700002**.

**Note:** The system does not populate the Sample Created from DWR check box, DWR Date and DWR Inspector fields until saving on the Contract panel.

38. **Save**.

**Complete the Contract panel.**

39. Click the **Contract** tab. The system displays the Contract panel with the CLASS A CONCRETE (BOX BRIDGES) item already selected for contract TRN349.

**Note:** As a FIELD - Operations Inspector, do not make any changes or enter a represented quantity.

40. **Save**.
Complete the Other panel.

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

42. Press the **space bar**. The system displays Destination Lab in the Type field.

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

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

45. In the **Destination Lab** column, double-click **DEST - TDOT Field Testing**. The system closes the Search Window window.

46. **Save**.

Assign tests.

47. On the toolbar, click the **Open Assign Tests** button. The system displays the Assign Sample Tests window.

   **Note**: The message on the window warns that assigning tests to the sample will lock the sample. If uncertain about the tests needed for the sample, click the Cancel button.

48. Click **More**.

49. In the **Test to be Assigned** pane, in the Test Description column, verify that **M016 – Field Tests of Freshly Mixed Concrete** is the only test to be assigned.

50. Click **Save Tests**. The system closes the Assign Sample Tests window, makes the Assign Tests button unavailable, changes the sample status to Received, and displays the Basic Sample Data panel.

Prepare for the next part of the exercise.

**Tip!** The Open button and the Copy Sample feature are not available immediately after creating a sample record from a DWR. To make the features available, close the Maintain Sample Information window and re-open it.

51. **Close**. The system closes the Maintain Sample Information window and displays the Material Inspection Detail window.

52. **Close**. The system closes the Material Inspection Detail window and displays the Daily Work Reports window.
53. **Close.** The system closes the Daily Work Reports window and displays the Daily Work Reports panel.

54. On the SiteManager Panel window, click the **Main Panel** tab. The system displays the Main Panel panel.

For the next part of the exercise, open a sample record that matches the sample record just created.

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

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

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

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

59. In the **Sample ID** column, click the column header. The system makes the Find field available.

60. In the **Find** field, type **81812**. The system selects the first row with that combination of numbers.

61. Did it select the sample record **jj00001148B081812**?

   *If Yes, continue.*
   *If No, scroll to locate sample ID jj00001148B081812.*

62. Click **OK**. The system displays the Basic Sample Data panel.

Enter test results.

63. On the toolbar, click the **Open LIMS** button. SiteManager launches the LIMS component.

64. On the **Navigation Panel**, double-click the **Enter Test Results** icon. LIMS displays the Enter Results window.

65. In the **Test Queue Criteria** area, note that the **All My Lab Units** choice has been selected.

66. In the **Filter Criteria** area, create a filter where **Test Method Equals M016**.
67. Click the **Apply** button.

**Note:** The sample ID for the record just created should appear along with the sample record and others that also contain the M016 template.

68. In the **Sample ID** column, select the sample ID of the sample record **jj00001148B081812**.

69. On the Test Data window, click the **Maximize** button to view more of the template at once.

70. Complete the following fields on the template with the values provided.

<table>
<thead>
<tr>
<th>How is the Concrete Placed?</th>
<th>Slip Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains A, F, or G Type Water Reducer?</td>
<td>Yes</td>
</tr>
<tr>
<td>Air Temp</td>
<td>65</td>
</tr>
<tr>
<td>Concrete Temp.</td>
<td>62</td>
</tr>
<tr>
<td>Concrete Slump</td>
<td>2.00</td>
</tr>
<tr>
<td>Entrained Air Content</td>
<td>5.6</td>
</tr>
<tr>
<td>Cylinders Cast? (Yes/No)</td>
<td>Yes</td>
</tr>
<tr>
<td>Cylinder Numbers</td>
<td>41, 41a, 41b</td>
</tr>
<tr>
<td>Number of Rejected Loads</td>
<td>0</td>
</tr>
</tbody>
</table>

71. On the Test Data window, click the **Restore Down** button.

72. Note that the test results are in-spec.

73. **Save**.

74. In the **Test Completed** column, select the check box.

75. **Save**. The system removes the test record from the Enter Test Results queue and makes it available in the Review Tests queue.

76. To clear the filter, in the **Filter Criteria** area, click the **Reset** button.

77. **Close**. The system displays the Navigation Panel window.

*You’ve created a sample record, assigned tests, and entered test results.*
### Exercise 19

In this exercise, progress the test through the Review Tests queue.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00001</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Training Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>jj00001148B081812 (sample ID)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scenario</td>
<td>FIELD - Operations Inspector reviews the entered test results for any tests performed in a contractor's lab or in the field. After reviewing the test, the M016 will autofinalize if the results are in-spec.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


2. In the **Filter Criteria** area, create a filter where **Test Method Equals M016**.

3. Click the **Apply** button.

4. In the **Sample ID** column, select the sample ID of the sample record **jj00001148B081812**.

5. In the lower pane in the Test Results window, review the entered data.

6. From the **Supervisor Action** dropdown list, select **Review Completed**.

7. **Save**. The system removes the test record from the Review Tests queue and makes it available to the sample record in the Review Samples queue.

   **Tip!** To view the sample and test results now, use the View-Only Sample Information window in LIMS, the Maintain Sample Information window in SiteManager, or the *Sample Details and Tests Results Report* (a custom report).

8. To clear the filter, in the **Filter Criteria** area, click the **Reset** button.

9. **Exit SiteManager LIMS**. The system displays the Maintain Sample Information window.
View the test results from the Maintain Sample Information window.

10. Click the **Tests** tab. The system displays the Tests panel with the M016 test selected.

11. From the **Services** menu, select **Enter/View Test Data**. The system displays the Material Test Template Usage window.

12. Scroll to view the test results entered for the M016 test.

13. **Close**. The system displays the Tests panel.

*You’ve progressed the in-spec test through the Review Tests queue and authorized the sample.*
Copying a Sample Record for Concrete

Exercise 20

In this exercise, create a sample record of a concrete sample for the compressive strength test by copying the sample record for the air, slump and temperature tests.

User ID jj00001 Password pass
Connection Training Server
Group Name FIELD - Operations Inspector [INSP]
Prior Keys jj00001148B081812 (sample ID)
Scenario FIELD - Operations Inspector pours cylinders, numbers them, sets them aside for 24-48 hours on the job site, strips them, marks them, and puts them in a curing box on the job site. FIELD - Operations Inspector creates a sample record and assigns the necessary test for the lab technician in the TDOT Concrete Cylinder/Core Lab to complete. Construction sends cylinders to Regional Office and then REG - M&T sends to HQ Nashville.

1. Click the Basic Sample Data tab. The system displays the Basic Sample Data panel.

2. On the Maintain Sample Information window’s Services menu, select the Copy Sample choice. The system displays the Copy Sample window.

3. Click the Copy lab control number from existing sample button.

4. Click OK. The system creates a new sample record linked to the air, slump and temperature sample record by lab control number CNjj00001148B081812.

5. Save.
Complete the Addtl Sample Data panel.

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

7. In the **Cntrl Number** field, type the cylinder numbers as **41, 41a, 41b**.

8. **Save**.

Complete the Contract panel.

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

Complete the Other panel.

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

**Warning!** This destination lab is not correct for this type of sample.

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

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

13. In the **Destination Lab** column, double-click **DEST – Headquarters/Receiving Dock**. The system closes the Search Window window.

**Warning! Do not assign the regional lab as the destination lab!** Although cylinders go to the regional lab for transfer, assign the final destination where the testing will be performed.

14. **Save**.
Assign tests.

15. On the toolbar, click the **Open Assign Tests** button. The system displays the Assign Sample Tests window.

   **Note:** The message on the window warns that assigning tests to the sample will lock the sample. If uncertain about the tests needed for the sample, click the Cancel button.

16. Click **More**. The system displays the Assign Sample Tests window.

17. Take note of the tests to be assigned and the additional available tests.

18. Click **Save Tests**. The system assigns the T22 - Compressive Strength of Cylindrical Concrete Specimens test to the TDOT Concrete Cylinder/Core Lab, closes the Assign Sample Tests window, displays the Basic Sample Data panel, makes the Open Assign Tests button unavailable and changes the sample status to Logged.

19. **Exit SiteManager**.

   *You’ve copied a sample record and assigned tests.*
Review Exercise for Copying Concrete Field Tests

In this exercise, copy the sample record for testing concrete in the field to create the sample record for testing cylinder strength.

User ID: jj00001
Password: pass
Connection: Training Server
Group Name: FIELD – Operations Inspector [INSP]
Scenario: Field – Operations Inspector has created a sample record for concrete field tests and now will copy the said sample record to associate cylinder test to be performed by HQ Material & Tests.

1. Copy sample jj0000115AS104849 and copy the lab control number from the existing sample.

2. Change the destination lab to DEST – TDOT Headquarters/Receiving Dock.

3. Assign test T22.

4. Exit SiteManager.

You’ve copied a sample, made the necessary changes and assigned tests.
Summary

To access the Maintain Sample Information window:

1. On the **Main Panel**, double-click the **Materials Management** icon.

2. On the **Materials Management** panel, double-click the **Sampling and Testing** icon.

3. On the **Sampling and Testing** panel, double-click the **Sample Information** icon. SiteManager displays the Maintain Sample Information window.

To assign tests to a sample record:

1. On the Maintain Sample Information window’s toolbar, click the **Open Assign Tests** button. The system displays the Assign Sample Tests window.

   **Note:** The message on the window warns that assigning tests to the sample will lock the sample. If uncertain about the tests needed for the sample, click the Cancel button.

   **TDOT recommends always clicking More instead of Accepting Default Tests.**

2. Click **More**.

3. Click **Save Tests**. The system closes the Assign Sample Tests window, makes the Open Assign Tests button unavailable, changes the sample status to Received, and displays the Basic Sample Data panel.

To open LIMS:

1. Double-click the **SiteManager LIMS** desktop icon.
   - or -
   On the Maintain Sample Information window’s toolbar, click the **Open LIMS** button.
Refer to the following procedure documents for general step-by-step instruction:

- P055 - Find Samples
- P058 - Maintain Sample Information
- P061 - Receive Sample at Destination Lab
- P062 - Receive Sample in Lab Unit
- P054 - Enter Test Results
- P064 - Review Tests
- P063 - Review Samples
- P071 - View-Only Sample Information
Creating and Viewing Diaries
for Field and Office Documentation

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

- Understanding Diaries .................................................. 2
- Creating a New Diary ..................................................... 4
- Viewing the DWR Template Report ................................. 6
- Authorizing Daily Work Reports .................................... 7
- Creating Charge Days and No Charge Days ...................... 9
- Viewing the Unauthorized DWR Report ......................... 11
- Unauthorized and Correcting a DWR Work Item Error ......... 12
- Viewing the History of Daily Work Reports ..................... 16
- Summary .................................................................... 22
- Review Exercise ............................................................ 25
Understanding Diaries

Each diary is a daily collection of the authorized Daily Work Reports (DWRs) submitted by all personnel working on the contract. Users can create only one diary per day per contract. Users can also create diaries for days when no DWRs are collected.

The Diary window has two panels:

- Authorize (approving for payment)
- Charge

Use the Diary window to perform five functions:

- Create a new or open an existing Diary for a specific contract and day
- Preview Daily Work Reports for a specific contract and day
- Authorize Daily Work Reports (or not)
- Apply Time Charges for a specific contract and day (This applies to milestone or working day contracts. Working day contracts are rarely used.)
- Make Remarks

![Diagram of Diary Window]

Figure 1. Diary Window - Authorize Panel

THE LEAD INSPECTOR OR DISTRICT SUPERVISOR WILL CREATE A DIARY FOR EACH DAY DURING THE LIFE OF A CONTRACT, INCLUDING WEEKENDS AND HOLIDAYS, AND WILL REVIEW AND AUTHORIZE ALL APPLICABLE DWRs ASSOCIATED WITH THE DIARY.

CREATE DIARIES IN SERVER MODE ONLY. DO NOT PIPELINE DIARIES.
Exercise 1

In this exercise, open the Diary window.

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

1. Start and log onto SiteManager as user jj00019 while connected in server mode.

2. On the Main Panel, double-click the Daily Work Reports icon. The system displays the Daily Work Reports panel.

3. Double-click the Diary icon.

You’ve opened the Diary window.
Creating a New Diary

Use the Diary window’s Authorize panel to create a diary. The user can create a diary with or without DWRs. Typically, the user creates a diary from the DWRs that have been submitted by the inspectors. To create a diary, the user selects a contract first, and then enters the diary date on the Authorize panel. By entering the date, the user is also selecting the DWRs with this date and creating a diary with this date. The user can enter a date by selecting it from a calendar. If the user double-clicks the Diary Date field, the system displays a calendar from which the user can select a date.

Figure 2. Calendar

Tip! The user cannot enter a date that is after the current date.

After the user selects a date, the Authorize panel lists the Daily Work Reports submitted for the selected date.
Exercise 2

In this exercise, create a new diary.

User ID  jj00019  
Password  pass  
Connection  Training Server  
Group Name  FIELD - District Operations Supervisor [PJSUPS]  
Prior Keys  TRN354  

1. On the Diary window, click the Services menu and click Choose Keys. The system displays the Contract ID window.

2. In the Contract ID column, scroll to and double-click TRN354.

3. In the Diary Date field, type 050114.

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

5. Save.

You’ve created a diary.
Viewing the DWR Template Report

TDOT developed the BOE report, *DWR Template*, that shows all the DWR templates used for a contract. With this report, users can print a list of all DWR templates for the items and time period chosen and view the DWR template entries for multiple items and time periods at the same time.

Figure 3. DWR Template Report – Parameters

Figure 4. DWR Template Report (page with template information)
REVIEW THE LAST PAGE OF THIS REPORT TO DETERMINE THE ITEMS ON THE CONTRACT THAT HAVE NO INSTALLED QUANTITIES.

Authorizing Daily Work Reports

Use the Authorize panel to authorize or unauthorize Daily Work Reports. A Daily Work Report with a check in the Authorized check box is considered authorized. When a Daily Work Report is marked as authorized, the system enters the current date in the Authorized Date field. Remove authorization (and the authorized date) by clearing the check from the Authorized check box, unless an estimate has been generated or approved.

By authorizing a Daily Work Report, the user is flagging that DWR for use by the Contractor Payments component of SiteManager in the Estimate Generation process. Authorization approves the installed work reported by the DWR to be included in the next estimate for payment.

Once a Daily Work Report has been uploaded to the server, authorized, and has been used in an approved estimate to pay a contractor for the installed work reported by it, it cannot be unauthorized or changed in any way.

BEFORE AUTHORIZING, THE LEAD INSPECTOR OR DISTRICT SUPERVISOR SHOULD REVIEW THE DWR FOR ERRORS OR OMISSIONS AND ANY NECESSARY REMARKS SHOULD BE ENTERED IN THE REMARK TYPE FIELD.

IT IS IMPORTANT THAT THE DISTRICT SUPERVISOR OR INSPECTOR REVIEW ALL DWRS AND AUTHORIZE EACH DWR ONLY IF ALL THE REPORTED PLACED QUANTITIES ARE ACCURATE.
**Exercise 3**

In this exercise, authorize the DWR.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00019</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Training Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - District Operations Supervisor [PJSUPS]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>TRN354</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. In the **Inspector** column, select **Bell, Troy**.
2. In the **Authorized** column, select the check box.
3. In the **Inspector** column, select **Jones, Pat**.
4. In the **Authorized** column, select the check box.
5. **Save**.

*You’ve authorized a DWR.*
Creating Charge Days and No Charge Days

For milestones, use the Charge panel to record charge or credit information for the day and enter remarks. Review the Daily Work Reports in the diary to determine if work was performed on the contract. If work was performed, a Full Day charge can be applied. A No Charge (credit) day is a day on which no work was performed on the contract. For No Charge days, the user must enter a credit reason to explain why a credit was given. The user can also apply charge or credit information to milestones for the Contract. For No Charge days applied to a milestone, the user must also enter a credit reason.

![Diary Window - Charge Panel](image)

**Figure 6. Diary Window - Charge Panel**

*THE MAJORITY OF CONTRACTS WILL HAVE A FIXED COMPLETION DATE AND THEREFORE IT WILL NOT BE NECESSARY TO INDICATE A CHARGE DAY ON THE CHARGE PANEL. CONSEQUENTLY, THE CHARGE PANEL HAS NO IMPACT ON FIXED COMPLETION DATE CONTRACTS.*

*CHARGING OF DAYS IS TYPICALLY ONLY DONE ON MOWING AND LITTER REMOVAL CONTRACTS.*

*TDOT WILL NOT USE HALF-DAY CHARGES.*
Exercise 4

In this exercise, review the Charge panel.

User ID jj00019    Password pass
Connection Training Server
Group Name FIELD - District Operations Supervisor [PJSUPS]
Prior Keys TRN354

1. On the Diary window, click the Charge tab. The system displays the Charge panel.

2. To apply the charge to a milestone, click in the lower pane.

Add a milestone.

3. On the toolbar, click New. The systems inserts an empty row.

4. In the Milestone dropdown list, select 01, Mowing Cycle 1.

5. In the Charge Amount dropdown list, confirm that the default Full Day is selected.

6. Save.

Add another milestone.

7. On the toolbar, click New. The systems inserts an empty row.

8. In the Milestone dropdown list, select 02, Mowing Cycle 2.

9. In the Charge Amount dropdown list, select No Charge.

10. In the Credit Reason dropdown list, select Weather.

11. Save.

*You’ve applied a no charge day to a milestone.*
Viewing the Unauthorized DWR Report

The BOE report, *Unauthorized DWR*, shows all the DWRs for a project that remain Unauthorized.

![Unauthorized DWR Report - Parameters](image)

**Figure 7. Unauthorized DWR Report - Parameters**

![Unauthorized DWR Report](image)

**Figure 8. Unauthorized DWR Report**

The BOE report, *Unauthorized DWR*, is used to print a list of all DWR reports on the server that are unauthorized for the time period. This will allow unauthorized DWRs to be authorized and included in the estimate.

---

*WE CANNOT VIEW TDOT CUSTOM REPORTS IN THE TRAINING ENVIRONMENT.*
Unauthorizing and Correcting a DWR Work Item Error

A Daily Work Report may be unauthorized on the Diary window if the DWR has not been included in a generated estimate. A user with the appropriate security rights may access the Diary window, and deselect the Authorize indicator (OFF). Once unauthorized, the Daily Work Report will no longer be locked for modification and the author of the DWR can update the record with the necessary changes. Once the record has been modified, a user with the appropriate security rights can access the Diary window, preview the DWR to verify the changes, and select the Authorize indicator (ON). The authorized DWR will be included in the next estimate generated.

Note: A DWR that has been included on a generated estimate that has not been approved at the final approval level can still be modified if necessary. The estimate may be deleted from the application and the outlined process for correcting a DWR may be executed.

![Diary Window with Authorized DWRs](image)

Figure 9. Diary Window with Authorized DWRs

IF AN INACCURACY IS DISCOVERED FOR A DWR THAT HAS BEEN AUTHORIZED ON A DIARY BUT NOT INCLUDED ON AN ESTIMATE, THE DWR SHOULD BE UNAUTHORIZED AND THE CREATOR OF THE DWR NOTIFIED OF THE NECESSARY CHANGES. IF THE DWR AUTHOR IS AN INSPECTOR, THE DWR SHOULD BE PIPELINED TO STANDALONE MODE, MODIFIED AS APPROPRIATE, AND PIPELINED BACK TO THE SERVER. THE PROJECT SUPERVISOR OR LEAD INSPECTOR WILL THEN RE-AUTHORIZE THE UPDATED DWR IN THE DIARY WINDOW.

OFFICE STAFF WILL CREATE AND CORRECT THEIR DWRs IN SERVER MODE.

EVERY ATTEMPT SHOULD BE MADE TO UNCOVER INACCURACIES PRIOR TO GENERATING AN ESTIMATE.

NOTE: DIARIES ARE MANAGED IN SERVER MODE ONLY.
Exercise 5

In this exercise, unauthorize a DWR on the diary; adjust the placed quantity on the DWR and then re-authorize the DWR for payment.

User ID jj00019  Password pass
Connection Training Server
Group Name FIELD - District Operations Supervisor [PJSUPS]
Prior Keys TRN354

1. Click the Authorize tab. The system displays the Authorize panel.

2. On the toolbar, click the Open button. The system displays the Contract ID window.

Choose a different diary on the same contract.

3. In the Diary Date column, double-click 05/02/2014. The system displays the selected record in the Diary window.

4. In the Inspector column, select Bell, Troy.

Unauthorize a DWR.

5. Clear the Authorized check box.

6. Save.

7. Close.

8. Exit SiteManager.

Now that the 05/02/14 DWR has been unauthorized, the Inspector will need to pipeline the DWR Server to PM for corrections.

Log on as an Inspector in server mode to pipeline the DWR to standalone.

9. Start and log onto SiteManager as user jj00004 while connected in server mode.

10. Pipeline Bell, Troy DWR for 05/02/14 on TRN354 to standalone from server.

11. Exit SiteManager.
Log on as an Inspector in standalone mode to correct the DWR.

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

13. On the Main Panel, double-click the Daily Work Reports icon. The system displays the Daily Work Reports panel.


15. Click the Open button. SiteManager displays the Contract ID window.


17. In the Inspector area, in the Inspector Name column, double-click Bell, Troy.

18. In the Date area, in the DWR Date column, double-click 05/02/14. SiteManager displays that DWR in the Daily Work Reports window.

Select the work item to correct.

19. Click the Work Items tab.

20. In the Item Code column, scroll to and select 204-07 for Project 67004-3213-14, Line Item Number 9500, Category Number 0100 and Description BEDDING MATERIAL (PIPE) CLASS B.

21. On the toolbar, click the Record Work Item button. The system displays the Work Items panel.

Choose a template to use for the correction.

22. On the toolbar, click the DWR Template button. SiteManager displays the DWR Template window.

23. In the Template ID column, double-click SM10E. The system displays the DWR Template – SM10E window.

24. In the Length (ft) field, type 50.00 (over the previously entered value of 5.00).

25. Press the Tab key to calculate.

26. Save.

27. Close. The system closes the DWR Template window.

28. Exit SiteManager.
Log on as an Inspector in server mode to pipeline the DWR to server.

29. Start and log onto SiteManager as user jj00004 while connected in server mode.

30. Pipeline Bell, Troy DWR for 05/02/14 on TRN354 to server from standalone mode.

31. Exit SiteManager.

Log on again as the Project Supervisor or the Lead Inspector.

32. Start and log onto SiteManager as user jj00019 while connected in server mode.

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

34. On the Daily Work Reports panel, double-click the Diary icon. The system displays the Diary window.

35. On the toolbar, click the Open button. SiteManager displays the Contract ID window.

36. In the Contract ID column, double-click TRN354.

37. In the Diary Date column, double-click 05/02/14.

Now, authorize the DWR in the diary.

38. In the Inspector list box, click the DWR for Bell, Troy.

39. Select the Authorized check box.

40. Save.

41. Close. The system closes the Diary window and displays the Daily Work Reports panel.

You’ve unauthorized a DWR on the diary; adjusted the placed quantity on the DWR and then re-authorized the DWR for payment.
Viewing the History of Daily Work Reports

The History window displays DWR records for the selected contract. To run history reports, select a contract when the History window first opens and displays a selection list of contracts. View the reports online or print the reports.

The History window has the following panels:

- DWR History
- Work Item History
- Contractor History

DWR History

The DWR History panel displays a history of all of the DWRs available to the current user. This report groups all the DWRs by date and inspector, in ascending order. Other information includes weather conditions, temperatures, and work suspended times. View the report online or print it.

Figure 10. History Window - DWR History Panel
Exercise 6

In this exercise, view the history of DWRs for a contract.

User ID jj00019       Password pass
Connection Training Server
Group Name FIELD - District Operations Supervisor [PJSUPS]
Prior Keys TRN354

1. On the Daily Work Reports panel, double-click the History icon.

2. On the toolbar, click the Next button. View the DWRs for TRN354.

3. What were the high temperature and morning weather conditions as recorded by jj00004 on 05/01/14?

You’ve viewed the history of DWRs for a contract.
Work Item History

The Work Item History panel displays a history of all work items recorded in the DWRs for the selected contract. View the report online or print it.

![History Window - Work Item History Panel](image)

Exercise 7

In this exercise, view the history of work items.

User ID  jj00019  Password  pass  
Connection  Training Server  
Group Name  FIELD - District Operations Supervisor [PJSUPS]  
Prior Keys  TRN354  

1. On the History window, click the Work Item History tab.

2. Use the vertical and horizontal scrollbars to view the work items for TRN354.

3. What quantity reported to date did jj00018 record for Line Item Number 2670 on 05/01/14? ______________________

You’ve viewed the history of work items.
Contractor History

The Contractor History panel displays three separate reports:

- Equipment History
- Supervisor History
- Variable Labor History

Each type of report can be selected using the appropriate toolbar button or by choices under the Services menu.

Figure 12. History Window - Contractor History Panel - Equipment History (clicked by default), Supervisor History, and Variable Labor History Buttons

Equipment History Report

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

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

Variable Labor History Report

Figure 15. History Window – Contractor History Panel – Variable Labor History Report
Exercise 8

In this exercise, select and view the contractor history reports.

User ID       jj00019       Password       pass
Connection    Training Server
Group Name    FIELD - District Operations Supervisor [PJSUPS]
Prior Keys    TRN354

1. On the History window, click the Contractor History tab. The system displays the Contract History panel.

2. The Equipment History report displays automatically.

3. What piece(s) of equipment and the number used did jj00018 record for Alman Construction Company, Inc. on the DWR for 05/04/14?

___________________________________________
____________________________________________________

4. Click the Variable Labor History button.

5. What Personnel Types did jj00018 record on site for Highways, Inc. on the DWR for 05/04/14? _____

____________________________________________________


You’ve viewed the Contractor History Reports.
Summary

To create a new diary:

1. On the Daily Work Reports panel, double-click the Diary icon.
2. Click the Services menu and click the Choose Keys choice.
3. In the Contract list box, scroll to and click the desired contract.
4. Click OK. The Authorize panel lists the DWRs submitted for the current date.
5. To change the date, double-click the Diary Date field. This opens a calendar on which a date prior to the current date can be selected. To select a prior month, click the left arrow. To enter the selected date, click OK.
6. To enter a remark, in the Remark Type list box, scroll to and click the remark type. Then, type the remark in the Remarks field.
7. Save.
8. Click OK.

To authorize a Daily Work Report:

1. On the Daily Work Reports panel, double-click the Diary icon.
2. Create a new diary or open an existing diary.
3. In the Inspector list box, scroll to the DWR to be authorized.
4. Select the Authorized check box (ON).
5. Click the Save button.

To unauthorize a Daily Work Report:

1. On the Daily Work Reports panel, double-click the Diary icon.
2. Open an existing diary.
3. In the Inspector list box, scroll to the DWR to be authorized.
4. Clear the Authorized check box (OFF).
5. Save.
To create charge or no charge day:

1. On the **Daily Work Reports** panel, double-click the **Diary** icon.

2. Create a new diary or open an existing diary.

3. Click the **Charge** tab.

4. In the **Charge Type** field, click the radio button of the charge type to apply to the day for the contract.

5. If the charge type is **No Charge**, in the **Credit Reason** dropdown list, select the reason for not charging all or part of the day.

6. To apply all or part of the charge or credit to a milestone, click the **Milestone** field and click the **New** button. The system inserts an empty row.

7. In the **Milestone** dropdown list, click the expand arrow and click the milestone to apply the charge or credit.

8. In the **Charge Amount** dropdown list, select **Full Day** or **No Charge**.

9. If **No Charge** is entered as the Charge Amount for the milestone, in the **Credit Reason** dropdown list, select the reason for a credit.

10. **Save**.

To access TDOT custom reports:

1. Launch Internet Explorer.

2. Access web address
   
   **http://boe.tdot.tn.gov/InfoViewApp/logon.jsp**

3. Click the **plus sign** next to **Public Folders**.

4. Click the **plus sign** next to **SiteManager**.

5. Click the desired group name.

6. Click the desired report name.

7. Enter the desired prompt values.

8. Click the **OK** button.

9. **Print** or **Save** the report as appropriate.
To view the History of Daily Work Reports:

1. On the **Daily Work Reports** panel, double-click the **History** icon. The system opens the Select Contract window.

2. In the **Contract** list box, scroll to and click the desired contract.

3. Click **OK**. The system display **DWR History** panel.

4. Click the **Down Arrow** button to view the DWRs.
Review Exercise

In this exercise, create a diary and review activities.

User ID: jj00019
Password: pass
Connection: Training Server
Group Name: FIELD - District Operations Supervisor [PJSUPS]
Prior Keys: TRN354

Create a diary and authorize the correct DWRs on one diary and unauthorize a DWR with an error on another diary.

1. Create a new diary for contract TRN354 on 05/06/14.
2. Authorize the Jones, Pat DWR for 05/06/14.
3. Open the diary 05/05/14 for contract TRN354.
4. Unauthorize the Bird, Chris DWR.
5. Exit SiteManager.

Pipeline a DWR with a reporting error on it from server to standalone.

7. Pipeline Bird, Chris DWR for 05/05/14 on TRN354 to Standalone mode.
8. Exit SiteManager.

Correct the reporting error in standalone.

9. Log on in standalone mode as jj00017.
10. Correct the reporting error for contract TRN354 on the DWR for 05/05/14.
    - Item code: 712-06, SIGNS (CONSTRUCTION)
    - Project Number: 67004-3213-14
    - Line Item Nbr: 1360
    - Template: SM22A

11. Change the # of Signs value to 4.
12. Exit SiteManager.
Pipeline the corrected DWR to the server.

13. Log on in Server mode as jj00017.

14. Pipeline DWR date 05/05/14 for jj00017 on TRN354 back to Server mode.

15. Exit SiteManager.

Authorize the corrected DWR and review reports.

16. Log on in server mode as jj00019.

17. Authorize the corrected DWR.

18. Preview the DWR History, Work Item History, and Contractor History for TRN354.

19. Exit SiteManager.
Understanding Estimate Basics and Progress Estimates for Field Documentation

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

- Overview 2
- TDOT Estimate Generation Schedule 4
- TDOT Progress Estimate Generation Workflow 5
- Viewing the Estimate Summary 8
- Viewing Estimate Discrepancies 10
- Viewing the Estimate Item Detail 13
- Viewing the Estimate Item Paybook 15
- Viewing the Estimate Summary to Contractor Report 17
- Summary 20
- Review Exercise 22
Overview

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

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

Figure 1. SiteManager Panel Window - Estimate Panel
The estimate generation process allows the user to generate an estimate for the contract. The user selects to generate a progress or a final estimate from the Contractor Payments component. The system then performs a background process which performs the following activities:

- **Delete pending estimate.** This activity deletes any previous pending estimate which has been calculated but not approved. The deletion will remove only details tied to the previous pending estimate.

- **Determine quantities for payment.** This activity will determine the quantity to be paid for each line item on the contract which has items installed for the estimate period.

- **Calculate stockpiled materials.** This activity will determine if an installed item has stockpiled materials. If it does, the process will use a stockpiled materials conversion factor to add a new line item adjustment to adjust the amount of payment which is to be made for the line item.

- **Identify discrepancies.** This activity checks for and reports 'discrepancies' for the work being performed by defined rules and conditions, e.g., physical completion dates for milestones with projected end dates during the estimate period. This activity provides a window with discrepancy details for the District Supervisor so that proactive steps can be taken for various project issues. The edits performed during the Progress estimate are a subset of the edits performed during the Final estimate.

- **Determine funding amounts.** This activity will calculate the funding amount for the different funding sources based upon the funding given for the contract, project, category or item.
TDOT Estimate Generation Schedule

The Office Staff of the unit assigned the contract generates all Progress estimates. Before the Estimate Generation and Reconciliation Cycle can begin, the Inspection staff must pipeline all DWR’s through the DWR Ending Date for their region. The following table outlines the Estimate Generation schedule for each of the Regions.

<table>
<thead>
<tr>
<th>Region</th>
<th>First DWR Date</th>
<th>Ending DWR Date (Estimate End Date)</th>
<th>First Day Office Staff Can Generate Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region 1</td>
<td>21st day of the previous month</td>
<td>Through 20th day of the current month</td>
<td>21st day of the current month</td>
</tr>
<tr>
<td>Region 2</td>
<td>1st day of the previous month</td>
<td>Through the last day of the previous month</td>
<td>1st day of the current month</td>
</tr>
<tr>
<td>Region 3</td>
<td>1st day of the previous month</td>
<td>Through the last day of the previous month</td>
<td>1st day of the current month</td>
</tr>
<tr>
<td>Region 4</td>
<td>16th day of the previous month</td>
<td>Through the 15th day of the current month</td>
<td>16th day of the current month</td>
</tr>
</tbody>
</table>

Table 1. TDOT Progress Estimate Generation Schedule
TDOT Progress Estimate Generation Workflow

*Inspection Staff*

The Inspection staff will complete the following pre-estimate planning and verification tasks prior to estimate generation:

<table>
<thead>
<tr>
<th>Progress Estimate Planning &amp; Verification Tasks</th>
<th>Functional Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Inspector/Inspector will check-in (Pipeline) all DWRs to the server through the ending DWR date as outlined in the PM to Server chapter.</td>
<td>Pipeline &gt; PM to Server Pipeline</td>
</tr>
<tr>
<td>The Lead Inspector/Inspector will run the DWR Template Report to verify installed quantities are correct and the Contract Sampling Summary report to ensure all sampling &amp; testing data has been entered.</td>
<td>TDOT Custom SM Report Accessories &gt; System Attachments</td>
</tr>
<tr>
<td>If it is a Maintenance Contract, be sure to check for missing MMS Templates on the DWR Template Report.</td>
<td></td>
</tr>
<tr>
<td>If the contract is a Maintenance Contract the inspector will access the Adjustments Plug-In to see if there are any missing MMS Templates.</td>
<td>Contract Administration &gt; Contract Records &gt; Contracts &gt; Plug-In &gt; Adj. Plug-In</td>
</tr>
<tr>
<td>Lead Inspector will run the Unauthorized DWR Report to find the applicable DWRs that have not been authorized.</td>
<td>TDOT Custom SM Report Accessories &gt; System Attachments</td>
</tr>
<tr>
<td>As needed, Lead Inspector will run and review the DWR Template Report to help determine which unauthorized DWRs should be authorized for the estimate. Lead Inspector may also need to review the DWRs and other reports to help with this determination.</td>
<td>Contractor Payments &gt; Reports &gt; Installed Work</td>
</tr>
<tr>
<td>As needed, Lead Inspector will create any missing Diaries for the estimate period and authorize all applicable DWRs that have not been authorized to date. A Diary is to be created for each day of the period covered by the estimate for the life of the Contract.</td>
<td>Daily Work Reports &gt; Daily Work Reports or Diary</td>
</tr>
<tr>
<td>Lead Inspector notifies Office Staff that all DWRs have been checked in and are ready to be included in an estimate.</td>
<td>External</td>
</tr>
</tbody>
</table>

Table 2. TDOT Estimate Planning & Verification Task
TDOT Progress Estimate Correction Workflow

If a discrepancy is displaying due to an error recorded on a DWR, the Office staff will not override the discrepancy. Instead, the Office Staff and Inspection Staff will complete the following tasks as part of the estimate correction process to update the DWR error:

<table>
<thead>
<tr>
<th>Estimate DWR Correction Workflow Tasks</th>
<th>Functional Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td>Contractor Payments &gt; Estimate &gt; Estimate History</td>
</tr>
<tr>
<td>Office Staff / Lead Inspector will unauthorize the DWRs that need to be corrected. Note: DWRs created by Office Staff should be unauthorized by the Office Staff; DWRs created by Inspection Staff should be unauthorized by the Lead Inspector.</td>
<td>Daily Work Reports &gt; Diary</td>
</tr>
<tr>
<td>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.</td>
<td>Pipeline &gt; Server to PM</td>
</tr>
<tr>
<td>DWR Creator corrects the DWR.</td>
<td>Daily Work Reports &gt; DWR</td>
</tr>
<tr>
<td>DWR Creator (Inspectors only) will pipeline the DWR to server mode after correcting the DWR</td>
<td>Pipeline &gt; PM to Server</td>
</tr>
<tr>
<td>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.</td>
<td>Daily Work Reports &gt; Diary</td>
</tr>
<tr>
<td>Office Staff will generate the Estimate and repeat the Progress Estimate Generation Workflow.</td>
<td>Contractor Payments &gt; Estimates &gt; Generate Estimate</td>
</tr>
</tbody>
</table>

Table 3. TDOT Progress Estimate Correction Workflow

EVERY EFFORT SHOULD BE MADE TO CORRECT THE ESTIMATE PRIOR TO RUNNING THE ADJUSTMENT PLUG-INS FOLLOWING THE WORKFLOW ABOVE. ONLY AFTER BEING SATISFIED THAT THE ITEM QUANTITIES ARE CORRECT SHOULD THE OFFICE STAFF RUN THE ADJUSTMENT PLUG-INS TO ADJUST THE PAY AMOUNT OF THE ESTIMATE.
Exercise 1

In this exercise, navigate to the Estimate panel.

User ID       jj00041       Password  pass
Connection     Server
Group Name     FIELD - Operations Inspector [INSP]

1. Start and log onto SiteManager as user jj00041 while connected in server mode.

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

3. Double-click the Estimate icon. The system displays the Estimate panel.

You’ve navigated to the Estimate panel.
**Viewing the Estimate Summary**

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

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

![Estimate Summary Window](image)

Figure 2. Estimate Summary Window
Exercise 2

In this exercise, view the Estimate Summary window.

User ID jj00041 Password pass
Connection Server
Group Name FIELD - Operations Inspector [INSP]

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

2. In the Contract area, in the Contract ID column, scroll to and double-click TRN370d.

3. In the Estimate area, in the Estimate column, double-click 0002. The system displays the Estimate Summary window.

4. What is the amount paid to the contractor on this estimate? ____________________________________________

5. Are there discrepancies on this estimate? _______________________

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

You’ve viewed the Estimate Summary window.
Viewing Estimate Discrepancies

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

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

Figure 3. Estimate Discrepancies Window
TDOT Discrepancy Types

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

- **Overrun Discrepancy** – Occurs if a major item is overrun by 10% or more and a minor item overrun by 999.99% or more.

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

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

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

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

IF AN ESTIMATE DISCREPANCY ON A PROGRESS ESTIMATE CANNOT BE RESOLVED, THE DISCREPANCY MUST BE OVERRIDDEN WITH AN EXPLANATION EXCEPT FOR A CHECKLIST EVENT.
Exercise 3

In this exercise, view the Estimate Discrepancies window.

User ID jj00041 Password pass
Connection Server
Group Name FIELD - Operations Inspector [INSP]
Prior Keys TRN370d; 002 (estimate)

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

View a discrepancy.

2. In the Description column, select Major Item 67004-3213-14/2690 exceeds Overrun Limits.

3. On the toolbar, click the Remarks button. The system displays the Remarks window.

4. What is the reason for this override?

5. Click the Remarks button again. The system closes the Remarks window.

View another discrepancy.

6. In the Description column, select Line Item # 67004-3213-14/0630 has a deficient tested matl discrepancy.

7. On the toolbar, click the Remarks button. The system displays the Remarks window.

8. What is the reason for this override?

9. Click the Remarks button again. The system closes the Remarks window.

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

You’ve viewed the Estimate Discrepancies window.
Viewing the Estimate Item Detail

The Estimate Item Detail window displays the Item quantities from approved Daily Work Reports.

![Estimate Item Detail Window]

Figure 4. Estimate Item Detail Window

THE OFFICE STAFF AND DISTRICT SUPERVISOR MAY VIEW THE ESTIMATE ITEM DETAIL WINDOW TO VERIFY THE ITEM QUANTITIES FOR PAYMENT ON THE ESTIMATE.

NOTE: IF THERE IS NO PENDING OR REJECTED ESTIMATE FOR THE CONTRACT, YOU WILL SEE CUMULATIVE TOTALS FOR ALL ITEMS ON ESTIMATES.
Exercise 4

In this exercise, view the Estimate Item Detail window for all items on a contract.

User ID jj00041 Password pass
Connection Server
Group Name FIELD - Operations Inspector [INSP]
Prior Keys TRN370d; 002 (estimate)

1. On the Estimate panel, double-click the Estimate Item Detail icon. The system displays a message to inform you that no pending or rejected estimates exist for this contract.

2. To see items for all estimates, click Yes. The system displays the Estimate Item Detail window.

Change the contract.

3. On the toolbar, click the Open button. The system displays the Contract window.

4. In the Contract ID column, scroll to and double-click TRN370e. The system displays the Estimate Item Detail window.

View an item.

5. Scroll to and select the following row:

   Project Nbr 67004-3213-14, Line Item Number 2650, Item Code 606-02.03, Description Steel Piles (10 INCH)

6. What quantity was installed to date for this item? __________

7. What quantity was paid to date for this item? ___________

View another item.

8. Scroll to and select the following row:

   Project Nbr, 67004-3213-14 Line Item Number 2690, Item Code 615-01.12, Description PRESTRESSED CONCRETE BULB TEE BEAM (6" WEB)(BT-72)

9. What quantity was installed to date for this item? __________

10. What quantity was paid to date for this item? ___________
View yet another item.

11. Scroll to and select the following row:

   Project Nbr 67004-3213-14, Line Item Number 0700, Item Code 307-01.08, Description ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING B-M2

12. What quantity was installed to date for this item? __________

13. What quantity was paid to date for this item? ______________

Prepare for the next exercise.

14. Close. The system closes the Estimate Item Detail window and displays the Estimate panel.

   You’ve viewed the estimate item details for an estimate on a contract.

Viewing the Estimate Item Paybook

The Estimate Item Paybook is an inquiry only window showing the payment history for a Contract Item. The Item payment history displays in reverse chronological order meaning the current Estimate Item displays on the first row. Thus, it is possible that the first row is not yet paid. Whether the first row is paid or not can be determined by the Approver User ID. If the Approver User ID is the final reviewer (HQ Finance), then the item has been paid.

![Figure 5. Estimate Item Paybook Window](image)

THE ESTIMATE ITEM PAYBOOK MAY BE USED TO CHECK AMOUNTS PAID ON EACH ESTIMATE FOR AN ITEM.
### Exercise 5

In this exercise, view the Estimate Item Paybook window for an estimate on a contract.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00041</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>TRN370e; 002 (estimate)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

2. In the **Contract ID** column, scroll to and double-click **TRN356e**.

View an item.

3. In the **Line Item** area, scroll to and double-click the following row:

   Ln Itm Nbr 0700, Project 67004-3213-14
   Item Code 307-01.08 Description ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING B-M2

4. Has an adjustment been applied to this item? ____________

View yet another item.

5. Click **Open**. The system displays the Select Contract and Line Item window.

6. In the **Line Item** area, scroll to and double-click the following row:

   Ln Itm Nbr 0670, Project 67004-3213-14
   Item Code, 307-01.01 Description ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A

7. Has an adjustment been applied to this item? ____________

Prepare for the next exercise.

8. **Close**. The system closes the Estimate Item Paybook window and displays the Estimate panel.

9. Click the **Contractor Payments** tab. The system displays the Contract Payments panel.

You’ve viewed the Estimate Item Paybook for an estimate on a contract.
Viewing the Estimate Summary to Contractor Report

The BOE report, *Estimate Summary to Contractor*, displays the amounts to be paid to the contractor based on the estimate. The report summarizes previous payments made to the contractor and the status of the contract when the estimate is generated. An itemized description of quantities and amounts on all items in every project contained in the estimate is also given.

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

![BOE Report - Estimate Summary to Contractor - Prompts](image)

Figure 6. BOE Report - Estimate Summary to Contractor - Prompts
Figure 7. BOE Report - Estimate Summary to Contractor [RR004] (initial page)

Figure 8. BOE Report - Estimate Summary to Contractor [RR004] (detail of subsequent page)
THE OFFICE STAFF / DISTRICT SUPERVISOR WILL REVIEW THE ESTIMATE SUMMARY TO CONTRACTOR REPORT TO ENSURE THAT THE LINE ITEM PAYMENT IS CORRECT AND TO ENSURE THE ITEM CATEGORIES ARE CORRECT. IF CHANGES ARE REQUIRED, THE OFFICE STAFF WILL FOLLOW THE ESTIMATE CORRECTION PROCEDURE. REMINDER: IF THE ESTIMATE MUST BE RE-GENERATED, THE ESTIMATE MUST FIRST BE RETURNED TO PENDING STATUS IN THE ADJUSTMENTS PLUG-IN BEFORE THE ESTIMATE IS DELETED AND GENERATED AGAIN.

Exercise 6

In this exercise, view the BOE report, Estimate Summary to Contractor, for an estimate on a contract.

User ID jj00041 Password pass
Connection Server
Group Name FIELD - Operations Inspector [INSP]
Prior Keys TRN356e

Note: For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to answer the questions.

1. In Figure 7, what is the amount due to the contractor before adjustments on this estimate? ________________

2. In Figure 7, are there any material discrepancies adjustments on this estimate? ____________________________.

3. In Figure 7, what is the amount of the material discrepancies adjustments on this estimate? ________________

4. In Figure 7, are there any stockpile payments on this estimate? ______

5. In Figure 8, for line item number 0670, item code 307-01.01, what is the total quantity installed on this estimate? ______

6. In Figure 8, for line item number 0670, item code 307-01.01, what is the total quantity deducted? ___________________

7. In Figure 8, for line item number 0670, item code 307-01.01, what is the total amount for the material discrepancy adjustment? ___________________

You’ve viewed the Estimate Summary to Contractor report.
Summary

To access Contractor Payment reports:

1. On the Contractor Payments panel, double-click the Reports icon.
2. Double-click the icon for the desired report.

To navigate to the Contractor Payments panel:

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

To navigate to the Estimate panel:

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

To open an estimate summary:

1. On the Estimate panel, double-click the Estimate Summary icon.
2. Click Open.
3. In the Contract list box, scroll to and double-click the desired contract.

To open an estimate discrepancy:

1. On the Estimate panel, double-click the Estimate Discrepancy icon.
2. In the list box, scroll to and double-click the desired contract.
3. In the list box, scroll to and double-click the desired estimate.

To view an estimate item:

1. On the Estimate panel, double-click the Estimate Item Detail icon. The system displays the Contract window.
2. In the Contract area, scroll to and double-click the desired contract. The system displays the Estimate Item Detail window.
3. From the Service menu, click View Estimate.
To view the estimate item paybook:

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

2. In the **Contract** area, scroll to and double-click the desired contract.

3. In the **Line Item** area, scroll to and click the desired line item.
In this exercise, review an estimate for a contract.

User ID  jj00041  Password  pass
Connection  Server
Group Name  FIELD - Operations Inspector [INSP]
Prior Keys  TRN356e

1. Navigate to the Estimate Summary window for contract TRN370c estimate 0002.

2. What are the item earnings for estimate 0002? ______________

3. Are there discrepancies on estimate 0002? ______________

4. Navigate to the Estimate Discrepancy window.

5. What types of discrepancies exist on this estimate?
   ______________________________________________________

6. Navigate to the Estimate Item Detail window.

7. View estimate item details for the following:
   Item Code 307-01.01, Line Item Number 0670,
   ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM)
   GRADING A.

8. What quantity was installed to date? ______________

9. What is the purpose of the Summary to Contractor report?
   ______________________________________________________

10. Exit SiteManager.

You’ve reviewed an estimate for a contract.
# Performing Contract Midlife Activities for Field Documentation

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

- Understanding Dates in SiteManager 2
- Viewing Checklist Event Dates 3
- Viewing a Key Date 5
- Correcting Quantities for Approved Progress Estimates 8
- Viewing DWRs Created by the ‘Quantity Correction’ Plug-in 13
- Summary 16
- Review Exercise 18
Understanding Dates in SiteManager

Since dates are very important in the life of a highway construction contract, they are important in SiteManager. Four of the most important types of dates in SiteManager are as follows:

- Critical Dates (of the Contract window)
- Key Dates
- Checklist Event Dates
- Milestone Dates

The first three, Critical Dates, Key Dates, and Checklist Events are very powerful because they can send SiteManager Inbox messages as reminders to an individual recipient or to a distribution list of recipients.

![Figure 1. Standard Messages Based on Data Type](image)

<table>
<thead>
<tr>
<th>Date Type</th>
<th>When the Message Is Sent</th>
<th>Recipient</th>
<th>Message Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical Dates (Single Occurrence)</td>
<td>When a value is entered in the Actual Date Field by a Headquarters User.</td>
<td>In-box of the Recipient.</td>
<td>The text defined in the Message Text field.</td>
</tr>
<tr>
<td>Key Date (Single Occurrence)</td>
<td>When the Projected Date of the Key Date is reached before the Actual Date is entered.</td>
<td>In-box of the user whose User ID is identified in the Project Manager field on the Primary Personnel folder tab of the Contract window.</td>
<td>The projected date was missed.</td>
</tr>
<tr>
<td></td>
<td>When a value is entered in the Actual Date Field by a User.</td>
<td>In-box of the Recipient.</td>
<td>The text defined in the Message Text field.</td>
</tr>
<tr>
<td>Checklist Event Dates (May be used for multiple occurrences)</td>
<td>When the Projected Date of the Checklist Event is reached before the Actual Date is entered.</td>
<td>In-box of the Recipient.</td>
<td>The text defined in the Message Text field.</td>
</tr>
<tr>
<td>Milestone</td>
<td>When the Scheduled Completion Date is reached before the Actual Completion Date entered.</td>
<td>Message appears in the Estimate Discrepancy window after estimate is generated for the period in which the milestone was missed.</td>
<td>Milestone XXX is not reached</td>
</tr>
</tbody>
</table>

Table 1. SiteManager Dates

CRITICAL DATES ARE NOT UPDATED BY FIELD PERSONNEL.
Viewing Checklist Event Dates

The Checklist Event Dates window lists the scheduled events for the selected contract. The data for the event selected in the upper pane is displayed in the lower pane. The data shows a chronological history of each occurrence of a repetitive scheduled event and the actual date recorded by the Office Staff for each occurrence. This window lets the Office Staff record the actual dates of the checklist scheduled events and add or delete checklist event date records.

Figure 2. Checklist Event Dates Window
Exercise 1

In this exercise, view the actual date of checklist events.

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

1. Start and log onto SiteManager as user jj00001 while connected in server mode.

2. On the Main Panel panel, double-click the Contract Administration icon. The system displays the Contract Administration panel.

3. Double-click the Contract Records icon. The system displays the Contract Records panel.

4. Double-click the Checklist Event Dates icon. The system displays the Select Contract window.

5. In the Contract ID column, double-click TRN353. The system displays the Checklist Event Dates window.

6. In the Event Type column, scroll to and select DBE Signed Subcontract(s) on File. In the lower pane, the system displays the actual date recorded by the Office Staff.

7. In the Event Type column, scroll to and select Traffic Control Checklist. In the lower pane, the system displays the actual date recorded by the Office Staff.

8. Close. The system closes the Checklist Event Dates window and displays the Contract Records panel.

You’ve viewed the actual date of checklist events.
Viewing a Key Date

Key dates are dates that are important when they occur. Therefore, a single recipient is notified when a key date is accomplished. The Project Manager is notified when a key date is not accomplished by the projected date. A key date can be set up to be required either when the contract is activated or when it is finalized. The user creates the key date schedule and records the actual occurrences of key dates on the Key Dates window.

The Key Dates window displays the key dates for the selected contract in the upper pane. The data for the selected key date is displayed in the lower window. The key date types are pre-defined in the system code tables. The system adds a set of default key dates automatically to each new contract. The user creates the key date schedule and records the actual occurrence of key dates on this window. The user can add, modify, and delete the key dates.

Figure 3. Key Dates Window

THE HEADQUARTERS FINANCE OFFICE UPDATES THE NOTICE TO PROCEED DATE UPON RECEIPT OF THE STARTING NOTICE REPORT.

UNTIL THE NOTICE TO PROCEED DATE IS ENTERED, FIELD DATA COLLECTION CAN BEGIN, BUT ESTIMATES CANNOT BE GENERATED.
<table>
<thead>
<tr>
<th>Key Date</th>
<th>Recipient</th>
<th>Fed/State</th>
<th>Enters Date</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>CC-3</td>
<td>District Supervisor designee</td>
<td>Fed</td>
<td>Office Staff</td>
<td>Projected Date = Adjusted Completion Date (from Critical Dates) All CC-3’s have been received.</td>
</tr>
<tr>
<td>Completion Notice (Date Time Stopped)</td>
<td>District Supervisor</td>
<td>Both</td>
<td>Office Staff</td>
<td>Projected Date = Adjusted Completion Date (from Critical Dates) Time charges have been stopped. The final inspection and all exceptions are complete.</td>
</tr>
<tr>
<td>Contract Materials Ready</td>
<td>Regional M&amp;T Supervisor</td>
<td>Both</td>
<td>Regional M&amp;T Designee</td>
<td>Projected &amp; Actual Date = Date Contract Materials are generated</td>
</tr>
<tr>
<td>DT1696 Materials and Tests Certification</td>
<td>District Supervisor designee</td>
<td>Both</td>
<td>Office Staff</td>
<td>Projected Date = Adjusted Completion Date (from Critical Dates). DT1696 Materials and Tests certification submitted to Regional Materials and Tests.</td>
</tr>
<tr>
<td>Field Prep Complete</td>
<td>District Supervisor</td>
<td>Both</td>
<td>Office Staff</td>
<td>Projected Date = Effective Date. Contract ready for field documentation.</td>
</tr>
<tr>
<td>Final Inspection</td>
<td>District Supervisor designee</td>
<td>Both</td>
<td>Office Staff</td>
<td>Projected Date = Adjusted Completion Date (from Critical Dates). Final Inspection completed this date as inspected and Accepted Date.</td>
</tr>
<tr>
<td>Final Records Submittal</td>
<td>District Supervisor designee</td>
<td>Both</td>
<td>Office Staff</td>
<td>Projected Date = Adjusted Completion Date (from Critical Dates). Project Records have been submitted to Final Records.</td>
</tr>
<tr>
<td>Notice of Termination</td>
<td>District Supervisor designee</td>
<td>Both</td>
<td>Office Staff</td>
<td>Projected Date = Adjusted Completion Date (from Critical Dates). NOT form complete. Submit Field Office Completion Notice Report.</td>
</tr>
<tr>
<td>Starting Notice</td>
<td>District Supervisor designee</td>
<td>Both</td>
<td>Office Staff</td>
<td>Projected Date = Effective Date. Used to generate the Starting Notice report which notifies HQ Finance to fill in the Notice to Proceed and Work Begin Dates (from Critical Dates)</td>
</tr>
</tbody>
</table>

Table 2. TDOT Default Key Dates
**Exercise 2**

In this exercise, view the key dates for a contract.

**User ID** jj00001  
**Password** pass  
**Connection** Training Server  
**Group Name** FIELD - Operations Inspector [INSP]  
**Prior Keys** TRN353

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

2. In the Key Date Type column, select Starting Notice.

3. Has this date occurred? _________________________________

4. Why is this date important? ______________________________

5. Close. The system closes the Key Dates window and displays the Contract Records panel.

*You’ve viewed the key dates for a contract.*
Correcting Quantities for Approved Progress Estimates

Use the Quantity Correction plug-in to adjust pay item quantities on Progress estimates that have reached final approval. Note that quantities on Final estimates may not be adjusted after the estimate is approved.

Figure 4. Quantity Correction Plug-in – Quantity Adjustments Window

ONLY THE ORIGINATOR OF THE DWR CAN MODIFY ANY OF THE QUANTITIES ON THAT DWR USING THE QUANTITY CORRECTION PLUG-IN.

A DWR QUANTITY CAN ONLY BE CORRECTED ONE TIME USING THE QUANTITY CORRECTION PLUG-IN.

THE QUANTITY CORRECTION PLUG-IN CREATES A SYSTEM GENERATED DWR. THIS DWR MUST BE AUTHORIZED BEFORE THE CORRECTION IS INCLUDED ON AN ESTIMATE.
Exercise 3

In this exercise, adjust an incorrect quantity on an approved DWR in the Quantity Correction plug-in.

User ID      jj00001
Password     pass
Connection   Training Server
Group Name   FIELD - Operations Inspector [INSP]
Prior Keys   TRN353

Open the contract and Quantity Correction plug-in.

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

2. Click the Attachments icon. The system displays the Attachments window.

Note: The remaining italicized steps cannot be completed in the training environment. The following steps and screen shots demonstrate the process steps.

3. Double-click the Qty Correction plug-in. The system displays the Quantity Adjustments window with the contract and inspector automatically selected.

![Figure 5. Quantity Adjustments Window](image-url)
4. *In the DWR Date of Incorrect Qty field, select 08/05/2014, the DWR with the incorrect quantity. The system displays the work items recorded on the DWR for the selected date.*

![Quantity Adjustments Window]

*Figure 6. Quantity Adjustments Window*
5. Select the following row for the DWR item with the incorrect placed quantity:

Project Number **67004-3213-14**, Category Number **0100**, Line Item Number **0010**, Item Code **105-01**, Description **CONSTRUCTION STAKES, LINES AND GRADES**, Location **Main Road**.

The system displays an area to make the correction.

![Quantity Adjustments Window]

**Figure 7. Quantity Adjustments Window**

6. In the **Correct Quantity** field, type **0.400**.

7. On the keyboard, press the **Tab** key. The Quantity Correction plug-in shows the calculated adjustment in the **Adjustment** field.

8. In the **Remarks/Calculations** field, type **Corrected typo that resulted in an incorrect quantity being recorded**.
9. **Save.** The system displays a message to inform you that once saved, the correction is not editable.

![Continue? Window](image1)

*Figure 8. Continue? Window*

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

11. **The system displays a message to inform you that a quantity has been adjusted for that line item number.**

![Untitled Message Window](image2)

*Figure 9. Untitled Message Window*

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

13. **On the toolbar, click Exit Application.**

Prepare for the next exercise.

14. To close the Contracts window, click Close. The system displays the Contract Records window.

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

You’ve viewed how to adjust an incorrect quantity on an approved DWR in the Quantity Correction plug-in.
Viewing DWRs Created by the ‘Quantity Correction’ Plug-in

The ‘Qty Correction’ plug-in attachment opens the Quantity Adjustments window and creates QTYADJ DWRs to adjust paid quantities on progress estimates that have already reached final approval. These may be viewed in the DWR window.

The auto created QTY ADJ DWRs are not authorized and will need to be authorized in the Diary window to be included in the next progress estimate.

![Daily Work Reports Window](image)

Figure 10. Daily Work Reports Window
Exercise 4

In this exercise, view the DWR resulting from the Quantity Correction plug-in.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00001</th>
<th>Password</th>
<th>pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection</td>
<td>Training Server</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Name</td>
<td>FIELD - Operations Inspector [INSP]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>TRN353</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. On the Main Panel panel, double-click the Daily Work Reports icon. The system displays the Daily Work Reports panel.

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

3. On the toolbar, click Open. The system displays a message prompting you to save changes.

4. In the message, click No. The system displays the Contract ID window.

Select a different contract.

5. In the Contract ID area, in the Contract ID column, double-click TRN356f.

6. In the Inspector area, in the User ID column, double-click QTYADJ1.

7. In the Date area, in the DWR Date column, double-click 09/10/14. The system displays a message to inform you that the DWR will be opened in a read-only format.

8. In the message, click OK. The system displays the Daily Work Reports window.

View the installed work item.

9. Click the Work Items tab. The system displays the Work Items panel.

10. Double-click the following row:

    Project Number 67004-3213-14, Line Item Number 0010, Category Number 0100, Item Code 105-01, Description CONSTRUCTION STAKES, LINES AND GRADES.

11. What is the placed quantity? ____________
View the remark.

12. On the toolbar, click the Remarks button. The system displays the Remarks window.

13. View the remark.

14. To close the Remarks window, click the Remarks button again. The system closes the Remarks window.

Prepare for the next exercise.

15. Close. The system closes the Daily Work Reports window and displays the Daily Work Reports panel.

16. Click the Main Panel tab. The system displays the Main Panel panel.

*You’ve viewed the DWR resulting from the Qty Correction plug-in.*
Summary

To access the Contract Records panel:

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

To record the actual date of a checklist scheduled event:

1. On the Contract Records panel, double-click the Checklist Event Dates icon.
2. In the Event Type column, scroll to and select the desired event type.
3. In the Actual Date field, type the actual date the checklist event occurred.
4. Save.

To view a key date:

1. On the Contract Records panel, double-click the Key Dates icon.
2. In the Key Date Type column, select the desired key date.

To correct the quantity of an item on a paid estimate with the Quantity Correction plug-in:

1. On the Contract Records panel, double-click the Contracts icon. The Contracts panel opens.
2. Click the Open button. The Select Contract list is displayed.
3. In the Select Contract list box, scroll to and double-click the Contract ID or perform a Find. The Select Contract list closes and the Description folder tab is displayed.
4. Click the Attachments button.
5. Double-click the Qty Correction plug-in.
6. In the DWR Date of Incorrect Qty field, select the DWR Date for the DWR to be corrected. Note: this must be a DWR included on a paid estimate, and must be a DWR you created.
7. Click to select the row for the DWR with the incorrect placed quantity. The Quantity Correction plug-in displays an area to make the correction.

8. In the **Correct Quantity** field, type the correct quantity to report for this item on this day.

9. On the keyboard, press the **Tab** key to calculate and display the quantity for the adjustment (Incorrect Quantity - Correct Quantity).

10. In the **Remarks/Calculations** field, type the reason for the correction.

11. **Save.** The Quantity Correction plug-in displays a message to inform you that a quantity has been adjusted for that line item number.

12. In the message, click the **OK** button.

To view the DWR of an item modified with the Quantity Correction plug-in:

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

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

3. Select the desired contract, inspector, and date of the DWR that was corrected. The system displays the DWR.

4. Click the **Work Items** tab.

5. Scroll to and double-click the item that was corrected.
Review Exercise

In this exercise, perform contract midlife activities.

User ID  jj00001    Password  pass
Connection  Training Server
Group Name  FIELD - Operations Inspector [INSP]
Prior Keys  TRN356f

1. Navigate to the Checklist Event Dates window for contract TRN353f.

2. What is the frequency for the DBE Signed Subcontract(s) on File event type? ________________________

3. When did the DBE Signed Subcontract(s) on File event type actually occur? ______________________________

4. Navigate to the Key Dates window for contract TRN356f.

5. What is the actual date for the Starting Notice?
____________________________________________

6. If an error is made on a DWR that needs to be corrected, and the estimate has been generated but not paid, what should be done?
____________________________________________________
____________________________________________________
____________________________________________________
____________________________________________________
____________________________________________________

7. What window is used to run the Quantity Correction plug-in to adjust the quantity on a DWR included in a paid estimate?
____________________________________________________

8. Exit SiteManager.

You’ve performed contract midlife activities.
Understanding Change Order Basics for Field Documentation

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

- Understanding General Change Order Concepts 2
- Viewing the Item Summary Window 8
- Tracking Change Orders 10
- Viewing the Custom Change Order 12
- Viewing the Change Order Report 15
- Summary 17
- Review Exercise 18
Understanding General Change Order Concepts

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

Contract change orders may include the following:

- Quantity adjustments for existing items (overrun/underruns)
- Adding new items of work to the contract (extra work)
- Time extensions on milestones or revisions to contract time or contract completion date
- Additions to the contract not affecting time or item quantities

Except for zero-dollar change orders, users can specify more than one function to make up a change order. Before saving a change order, perform edits to ensure that its components are reconciled with its selected functions. The system displays messages to inform the users if information has not been entered for a selected function.

Select a contract to create a new change order.

![SiteManager Panel Window - Change Order Maintenance Panel](image)

Figure 1. SiteManager Panel Window - Change Order Maintenance Panel
Exercise 1

In this exercise, navigate to the Change Order Maintenance panel.

User ID jj00041 Password pass
Connection Server
Group Name FIELD - Operations Inspector [INSP]

1. On the Main Panel panel, double-click the Change Orders icon. The system displays the Change Orders panel.

2. Double-click the Change Order Maintenance icon. The system displays the Change Order Maintenance panel.

You've navigated to the Change Order Maintenance panel.
Change Order Life Cycle

SiteManager software’s change order functions reflect the life cycle of contract change orders.

Creating a New Change Order

Only users with specific authority may create new change orders. Each change order must be associated with an existing active contract. Record specific information using the following Change Order window’s panels:

- Header
- Items
- Time Adjustments
- Explanations

Calculating Change Orders

After the full change order creation or maintenance activities are complete, including entries or updates to the change order items, time adjustments and explanations as desired, users may calculate the view-only CO Amount field value on the Header panel.

Maintaining Change Orders

Once a change order has been created, updates to the change order information may be required. Modify change order header information, items, time frames, and explanations in update mode on the appropriate panels.
Reviewing and Approving of Change Orders

After it is created, a draft change order can be forwarded via In-Box notification for parallel review. Parallel review is concurrent review by more than one reviewer at a time.

The writer of the change order can also place the change order into Pending status and submit it for a hierarchical approval, skipping the review process.

Users involved in reviewing a draft change order or approving a pending change order can record their decisions about proposed changes to the contract using the Review/Approve window. Reviewers/approvers receive an In-Box message from the author requesting an action, review or approval for the change order. The In-Box message specifies the contract and change order number.

When a change order that is in Pending status (in the approval process) is given the recommendation “Denied” in the Change Order Review/Approve window, it remains in Pending status. The change order creator may choose to change the status to Draft to make modifications, then change it back to Pending to resubmit it for approval. If the change order will never be approved, it may be changed to Denied status on the Header panel. Once a change order is in Denied status, it may not be modified or submitted for review/approval.

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

Tracking Change Orders

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

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

Authorized users may also display details about current and historic Contract items on-line using the Item Summary window.
Once approved, change order data may be analyzed to help manage the change order process. The Change Order Reports function allows users to produce reports that gather information about trends in Contract changes.

A PAPER COPY OF THE CHANGE ORDER IS STILL REQUIRED FOR PHYSICAL SIGNATURES. SITEMANAGER REFLECTS ELECTRONIC VERSION.

WHEN AN APPROVER PHYSICALLY SIGNS THE CHANGE ORDER, THAT APPROVER SHOULD ALSO INDICATE THEIR APPROVAL OF THE CHANGE ORDER IN SITEMANAGER. THE HEADQUARTERS FINANCE OFFICE WILL INDICATE APPROVAL OF THE CHANGE ORDER ON BEHALF OF ALL APPLICABLE HEADQUARTERS APPROVERS.

Understanding Change Order Status

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

- **Draft**: A change order is Draft status while it is being created, edited, or forwarded for review.

- **Pending**: A change order is changed to Pending status when it needs to be submitted for the approval process. While in Pending status, the change order cannot be modified except for its status.

- **Pending (with a Recommendation of Denied)**: A change order in Pending status (under review) that received a recommendation of ‘Denied’ may have its status changed back to Draft. With a Draft status, the change order may be edited (revised), have its status changed to Pending, and be resent through the approval process.

- **Approved**: A change order is automatically placed in Approved status when the last approver completes the approval process – it is not a manual selection. When a final approval level approves a change order, it cannot be altered. Adjustments can only be made by creating a new change order.

- **Denied**: Changing the status to Denied causes it to become inquiry-only for the life of the contract. The Denied status is not available until the Change Order has been placed in Pending status.

All change orders must be in either Approved or Denied status for the contract completion process.
IF AN APPROVER SELECTS 'DENY' IN THE REVIEW/APPROVE WINDOW, THE CREATOR SHOULD CHANGE THE STATUS BACK TO DRAFT, MAKE CORRECTIONS, AND CHANGE IT TO PENDING IN THE HEADER WINDOW TO SUBMIT IT AGAIN.

IF AN APPROVER SELECTS 'DENIED' IN THE REVIEW/APPROVE WINDOW AND PROVIDES A REMARK INDICATING THAT THE CHANGE ORDER WILL NEVER BE APPROVED AND PROVIDES A REASON, THE CREATOR SHOULD CHANGE THE STATUS OF THE CHANGE ORDER TO DENIED IN HEADER WINDOW.

BEWARE: A CHANGE ORDER IN DENIED STATUS MAY NOT BE CHANGED TO DRAFT.

Understanding Change Order Functions

The six types of change order functions include the following:

- **Overruns or Underruns** - Used when the existing contract items are either exceeded or not needed to complete the contract or work item.

- **Extra Work** - Used when additional work items are required to complete the contract.

- **Time Adjustments** - Used when the time frames need to be adjusted to reflect the completion period for a milestone or contract.

- **Zero Dollar** - Used only for contract adjustments that will not affect the dollar amount of the contract (for example, adding permits or special provision to the contract).

- **Force Account** - TDOT will not use this function. Force Account change orders will require the “Extra Work” function to be selected.

- **Final Quantity** - TDOT will not use this function.

Users define the purpose of the change order by selecting among the different functions. Except for Zero Dollar, users can specify more than one function to make up a change order.
Viewing the Item Summary Window

The Contract Change Order Item Summary window allows users to view the details of an item on a change order, regardless of the status of the change order. The Item Summary window is a display-only window with two data windows. The top pane displays the selected change order item’s description as well as bid, current and pending contract item quantities and corresponding amounts. The lower pane displays a list of the change orders associated with the selected change order item, including the quantity, dollar amount and the status of each change order.

Figure 2. Item Summary Window
Exercise 2

In this exercise, view the Item Summary window.

User ID jj00041 Password pass
Connection Server
Group Name FIELD - Operations Inspector [INSP]

1. On the Change Order Maintenance panel, double-click the Item Summary icon. The system displays the Change Order Items Select window.

2. In the Contract ID area, in the Contract ID column, double-click TRN350.

3. In the Change Order Items area, in the Item Code column, double-click 607-37.02. The system displays the Item Summary window.

4. What is the adjustment to the item quantity for this change order? ________

5. On which change order did this occur? __________

6. Has this item been adjusted on any change orders for this contract? _______

7. To close the Item Summary window, click the Close button.

You’ve viewed the Item Summary window.
Tracking Change Orders

The status of a Change Order in the review or approval cycle can be monitored by opening the Tracking window at any time. The Tracking window for a change order is a view-only window and displays the following information:

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

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

Figure 3. Tracking Window
Exercise 3

In this exercise, view the Tracking window for another change order.

User ID     jj00041  Password  pass
Connection  Server
Group Name  FIELD - Operations Inspector [INSP]
Prior Keys  TRN350 (contract); 001 (change order)

1. On the Change Order Maintenance panel, double-click the Tracking icon. The system displays the Tracking window.

Open another change order on a different contract.

2. On the toolbar, click the Open button. The system displays the Change Order Tracking Select window.

3. In the Selection area, click the Contract ID button. The system displays the Contract ID area.

4. In the Contract ID column, double-click TRN355. The system displays the Change Orders area.

5. In the CO Nbr column, scroll to and double-click 007 The system displays the Tracking window.

6. For general information about the change order, view the CO Header panel.

7. Click the CO Tracking List tab. The system displays the CO Tracking List panel.

8. Who is the next person to approve the change order? 

9. To close the Tracking window, click the Close button. The system displays the Change Order Maintenance window.

You’ve viewed the Tracking window for a change order.
**Viewing the Custom Change Order**

The BOE report, *Supplemental Agreement and/or Request for Construction Change*, is a custom TDOT document to gather physical signatures from department officials. It’s important that the report is reviewed for accuracy.

![Change Order – Parameters](image)

**Figure 4. Change Order – Parameters**
Supplemental Agreement and/or Request for Construction Change

Change Order No. 001

STATE OF TENNESSEE
Department of Transportation
Burns Building
Nashville, TN 37243-0106

Contract No.: CHP-160
Project No.: 4401-3200-04, 4401-4200-04, 71008-3203-04, 71008-4203-04,
71011-3210-04, 71011-4212-04
Reference No.: HSD-06(0), N/A, HSD-06(1), N/A, HSD-06(1), N/A
County(s): JACKSON, DWTNAM

Whereas, we, RODGERS GROUP, INC, with TRAVELERS CASUALTY & SURETY COMPANY OF AMERICA, as Guarantors, entered into a contract with the STATE OF TENNESSEE, Department of Transportation, Bureau of Operations, on 2012/09/20, for the construction by said Contractor of the above designated contract; and Whereas, certain items of construction encountered, are not covered by the original contract, we desire to submit the following additional items of construction to be performed by the Contractor and paid by the State as the prices scheduled therein below:

The purpose of this Change Order is to establish unit prices for items of work not covered by the original contract.

The purpose of this Change Order is to extend contract time.

This change order is necessary to add Items 505-02-02, Single Guardrail (Type 2), Item 700-06-00, Radius Rail; Item 712-02-01, Additional Traffic Control and Item 713-02-14, Flexible Delineator (Bi-Directional, White), and extend the contract 24 days to a new completion of November 10, 2015.

Items 505-02-02, Single Guardrail (Type 2), Item 700-06-00, Radius Rail; Item 712-02-01, Additional Traffic Control and Item 713-02-14, Flexible Delineator (Bi-Directional, White), are necessary items for safety improvements which will be added to the ongoing resurfacing contract. A Road Safety Audit Review held on September 30, 2015, determined the need of additional safety improvements on 0.82 mi from 0.84 mi (0.064) to 0.86 mi (0.064) in Granville. The existing guardrail throughout the current project in Jackson County is well below the acceptable height standards and will be upgraded to the new 31 inch height safety standards. Several guardrail locations measured below 23 inches making it difficult to attach new type 3E and terminate with the existing guardrail and adjustments necessary are inadequate to meet the minimum height restrictions. Due to the rural location and numerous curves, flexible delineators (bi-directional, white) are being added to this contract per the Road Safety Audit Review to absorb the changes in the horizontal alignment. The new completion date is November 15, 2015.

As a result of the increased safety improvements, it is necessary to extend the contract 24 days. The new completion date is November 15, 2015.

Project Documents supporting this time extension are available upon request.

This Change Order includes a Time Extension.

Unit prices listed below include all labor, materials, profit, overhead and incidentals necessary to complete this work.

<table>
<thead>
<tr>
<th>Item Code</th>
<th>Description</th>
<th>Unit</th>
<th>Corresponding Quantities</th>
<th>Revised Quantities</th>
<th>City Glass Cost</th>
<th>Under Cost</th>
<th>Contract Price</th>
<th>Net Amount Due Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>TCP-02-02</td>
<td>SINGLE GUARDRAIL (TYPE 2 )</td>
<td>Linear Feet</td>
<td>24.170</td>
<td>24.170</td>
<td>17.55</td>
<td>19.63</td>
<td>43,143.43</td>
<td>40,500.00</td>
</tr>
</tbody>
</table>

Figure 5. Supplemental Agreement and/or Request for Construction Change Report (initial page)
Figure 6. Supplemental Agreement and/or Request for Construction Change Report (final page)
Viewing the Change Order Report

The reviewer and/or approver of a change order uses the Change Order Report window as a source of information. This report window displays all the data included on a change order. A second page displays only if there are Time Extensions associated with the change order selected for this report.

![Figure 7. Report Criteria](image1)

![Figure 8. Change Order Report](image2)

**THE STANDARD CHANGE ORDER REPORT IS AVAILABLE IN STANDALONE MODE.**
Exercise 4

In this exercise, access and view the Change Order report.

User ID jj00041 Password pass
Connection Server
Group Name FIELD - Operations Inspector [INSP]
Prior Keys TRN355 (contract); 007 (change order)

1. On the SiteManager Panel window, click the Change Orders tab. The system displays the Change Orders panel.

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

3. Double-click the Change Order Report icon. The system displays the Report Criteria window with the current keys selected.

4. To generate the report, click OK.

5. What is the description for this change order?

__________________________________________________________________________

6. What is the total value of this change order? _________

7. To close the Change Order Report window, click Close. The system displays the SiteManager Panel window.

Prepare for the next exercise.

8. Click the Main Panel tab. The system displays the Main Panel panel.

You’ve accessed and viewed the Change Order report.
Summary

Contract change orders may include:

- Quantity adjustments for existing items
- Adding new items of work to the contract
- Extra work
- Time extension on milestones or revisions to a contract completion date

To access the Change Orders panel:

1. On the Main Panel panel, double-click the Change Orders icon. The system displays the Change Orders panel.

To view the Item Summary window:

1. On the Change Orders panel, double-click the Change Order Maintenance icon. The system displays the Change Order Maintenance panel.
2. Double-click the Item Summary icon. The system displays the Change Order Items Select window.
3. Select the desired contract and change order.
4. Open the desired record.

To track the status of a change order:

1. On the Change Orders panel, double-click the Change Order Maintenance icon. The system displays the Change Order Maintenance panel.
2. Double-click the Tracking icon. The system displays the Change Order Tracking Select window.
3. Select the desired contract and change order.

To view the Change Order report:

1. On the Change Orders panel, double-click the Reports icon. The system displays the Reports panel.
2. Double-click the Change Order Report icon.
3. Select the desired contract and change order.
4. Click OK to generate the report.
Review Exercise

In this exercise, review information about a change order.

User ID jj00041 Password pass
Connection Training Server
Group Name FIELD – Operations Inspector [INSP]
Prior Keys TRN355 (contract); 005 (change order)

1. Navigate to the Tracking window and view the approvers for contract TRN355, change order 006.

2. Who is the next approver for this Change Order?


5. What is the Change Order Type for this change order?

6. Exit SiteManager.

You’ve reviewed information about a change order
Answers

This section contains the answers to Field Staff course exercise questions.

- Getting Started 2
- Common Functionality 2
- Administering Contracts for Field Documentation 3
- Creating Daily Work Reports for Field and Office Documentation (Part 1) 5
- Creating Daily Work Reports for Field and Office Documentation (Part 2) 6
- Test Templates to Material Categories 6
- Processing Sample Records and Test Results for Operations Inspectors 6
- Creating and Viewing Diaries for Field and Office Documentation 7
- Understanding Estimate Basics and Progress Estimates for Field Documentation 8
- Performing Contract Midlife Activities for Field Documentation 9
- Understanding Change Order Basics for Field Documentation 10
Getting Started

Not applicable.

Common Functionality

Exercise 1

5. Update
6. None
12. Open

Exercise 2

2. Taylor Smith
3. 00/00/00
4. TRN349
5. New

Exercise 3

5. New, then Choose Keys
Administering Contracts for Field Documentation

Exercise 2
2. Region 2, Unit 723
3. Completion Date
4. $14,657,837.81

Exercise 3
2. Overton

Exercise 5
3. 05/17/14
4. 04/30/17

Exercise 6
2. Jamie Nopps

Exercise 7
2. Highways, Inc.
3. Johnson & Company
4. Hudson Insurance Co

Exercise 8
2. 8.32%
Exercise 9
2. 4
4. Mowing Cycle 1
5. 06/01/13
6. 20 days

Exercise 10
5. SR-84; EXIST. SR-85, FROM NEAR WINDLE RD. TO SR-84
6. State Route 84

Exercise 11
2. Overton

Exercise 12
5. $1.00000
6. .000
10. $143.00000
11. 240.00

Exercise 14
4. Three
5. Two
7. 07/10/14
8. No, because the Parent Subcont Nbr field is blank

Exercise 15
2. 1
3. Quantity: 13,111.000  Amount: $89,154.80
Review Exercise

3. Region 2, Unit 723
4. Grade & Drain
5. 05/16/14
6. Johnson & Company
8. No
10. One
13. 1,885.00
14. No
16. Four
19. Southern State Survey
20. No
21. No

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

Exercise 8

4. DWR template required
8. DWR template
15. 40.00

Exercise 10

10. Yes – Highways, Inc.
12. Three types, three pieces
14. One
Creating Daily Work Reports
for Field and Office Documentation (Part 2)

Exercise 5

27. 29.0
30. 29.0

Review Exercise

10. 40.0

Test Templates to Material Categories

Not applicable.

Processing Sample Records and Test Results
for Operations Inspectors

Exercise 5

7. Yes or No. Depends on the other sample IDs created by the user.

Exercise 6

9. 4.5%
Exercise 13

7. So far, yes. In-spec is okay.
12. So far, yes. No-spec is okay.
17. No. Out-of-spec test results disqualify the sample from auto-finalizing.
25. Out-of-spec
29. No-spec
33. In-Spec

Review Exercise for Asphalt at the Plant

4. In-spec

Exercise 18

61. Yes or No. Depends on the other sample IDs created by the user.

Creating and Viewing Diaries for Field and Office Documentation

Exercise 6

3. 57 degrees and partially cloudy

Exercise 7

3. 13.0

Exercise 8

3. Concrete Grinder (1), Pickup Truck (2), Crane (1)
5. Class “A” Operators, Foreman, Unskilled Laborer, Truck Driver (2 axles)
Understanding Estimate Basics and Progress Estimates for Field Documentation

Exercise 2

4. $1,412,011.08
5. Yes, Item and Other

Exercise 3

4. Change order to increase quantity is Pending.
8. Not enough samples were taken and completed for the amount installed.

Exercise 4

6. 70.100
7. 70.100
9. 5,500.000
10. 5,500.000
12. 929.000
13. 929.000

Exercise 5

4. No
7. Yes, for -20,000.00
Exercise 6
1. $1,433,841.78
2. Yes
3. $-25,218.44
4. No
5. 1400
6. -400
7. -20,000.00

Review Exercise
2. $1,437,229.52
3. Yes, Item and Other
5. Overrun, Checklist Event and Deficient Tested Material
8. 1,400.00
9. Send copy of estimate to the contractor.

Performing Contract Midlife Activities for Field Documentation

Exercise 2
3. Yes, on 5/21/14
4. Time starts on that day

Exercise 4
11. -.600
Review Exercise

2. One Time Only
3. 08/15/14
5. 05/21/14
6. See “TDOT Progress Estimate Correction Workflow”
7. Contracts window > Attachments > Qty Correction plug-in

Understanding Change Order Basics for Field Documentation

Exercise 2

4. 80.00
5. 001
6. No. The Approved Change Order field has a Quantity of 0.

Exercise 3

8. Post, Craig

Exercise 4

5. Increasing quantity to an existing item
6. $11,250.00

Review Exercise

2. Post, Craig
5. Category 3