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
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Understanding the General Workflow

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

Figure 1. General Workflow
Using this Guide

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

Objectives

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

Topics

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

Instructor-Led Exercises

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

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.

![Desktop Icon](image.png)

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.

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)

Depend on your SiteManager security privileges, users may have:

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

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

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

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

1. In the SiteManager Logon dialog box, click in the User ID field and type jj00020.

2. In the Password field, type PASSWORD.

3. Click the Change Password button. SiteManager displays the Change Password dialog box.

4. In the Old Password field, type PASSWORD.

5. In the New Password field, type pass.

6. In the Confirm Password field, type pass.

7. Click the OK button. The system displays the Available Groups for < user ID > window because this user belongs to more than one security group.

8. In the Group Name column, double-click FIELD - District Operations Supervisor. The system displays the Main Panel panel.

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

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

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

**IMPORTANT TIPS REGARDING YOUR USER ID:**

1. **WHEN A USER ID IS FIRST ASSIGNED TO A USER, THE DEFAULT PASSWORD IS "PASSWORD" (ALL CAPS).** THE USER MUST CHANGE THE PASSWORD BEFORE LOGGING ON TO SITEMANAGER.

2. **SITEMANAGER USER IDS FOR TDOT CRITERIA:**
   - SEVEN CHARACTERS IN LENGTH.
   - THE FIRST TWO CHARACTERS WILL BE JJ (IN LOWERCASE), FOLLOWED BY A RANDOMLY ASSIGNED 5-DIGIT NUMBER.

**IMPORTANT TIPS REGARDING YOUR SITEMANAGER PASSWORD AND LOGON ATTEMPTS:**

1. **IT IS IMPORTANT THAT YOU DO NOT GIVE OUT YOUR PASSWORD TO ANYONE. SITEMANAGER MAINTAINS A RECORD OF EVERYTHING YOU DO IN SITEMANAGER. THESE RECORDS ARE THE SAME AS YOUR SIGNATURE.**

2. **IF YOU HAVE ATTEMPTED TO LOG ON TWICE AND HAVE FAILED, CLOSE THE SITEMANAGER LOGON WINDOW AND START AGAIN. THIS WILL ALLOW YOU TO TRY TO LOG ON AGAIN WITHOUT DISABLING YOUR PASSWORD.**

3. **IF YOU ATTEMPT TO LOG ON THREE TIMES AND FAIL, SITEMANAGER WILL DISABLE YOUR PASSWORD. CONTACT REGIONAL SUPPORT IF PASSWORD IS DISABLED.**

4. **SITEMANAGER PASSWORDS FOR TDOT CRITERIA:**
   - FOUR TO EIGHT CHARACTERS IN LENGTH
   - CASE-SENSITIVE - SITEMANAGER CAN TELL THE DIFFERENCE BETWEEN CAPITAL AND LOWERCASE LETTERS. TYPE YOUR ID AND PASSWORD PRECISELY.
   - 90-DAY EXPIRATION
   - CANNOT BE THE WORD "PASSWORD"
   - CANNOT CONTAIN SYMBOLS.

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

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

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](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.

**NOTE**

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

9. Double-click the **Contract Administration** icon. View the icons available.

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

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

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

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

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

![Image of the SiteManager Toolbar](image)

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
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.
Searching, Filtering, and Sorting

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

Understanding Search and Filter Search

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

Understanding Sort and Filter

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

Figure 1. ‘Sort Criteria – New Sort’ Window
**Understanding Criteria Window Conditions, Values and Joins**

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

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

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

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

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

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

When creating multiple conditions, know the following:

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

---

**NOTE**

UNSAVED FILTERS REMAIN ACTIVE UNTIL THE USER EXITS THE SYSTEM.

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

Exercise 4

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

User ID  jj00020  Password  pass

Connection  Training Server
Group Name  FIELD – Operations Office Staff [OSTAFF]
Prior Keys  Not applicable.

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

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

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

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

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

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

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

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

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

Use the column headings to sort the list.

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

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

12. Right-click on the first record.
13. On the menu, click **Sort**.
14. In the **Sort Criteria** window, click **Add**.
15. In the **Field** dropdown list, select the “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](image)

Exercise 5

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

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

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

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

Figure 3. ‘Filter Criteria – New Filter’ Window

<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)

Exercise 8

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

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj0020</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)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

Generating Standard System Reports

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

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

Contractor Payments
  - Installed Work
  - Work Suspend/Resume Times
Change Orders

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

Mix Design

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

Approved Lists

- Calibrated Equipment Report
- Qualified Labs Report

Exercise 10

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

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

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

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

4. Double-click the **Installed Work** icon. SiteManager displays the Report Criteria window.

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

6. Review the report.

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.

**TIP!**

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

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 [Image]. 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.

2. Open **transPORTAL** from [http://intranet.tdot.tn.gov/#](http://intranet.tdot.tn.gov/#).

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

5. Click the Document List button.

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

7. Double-click the SiteManager folder.

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

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

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

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

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

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

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

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

   ▪ In a dropdown list, select the desired value.

10. Click OK. The system generates the report.
Activating Contracts for Office Documentation

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

- Understanding New Contracts 2
- Viewing Contracts 4
- Viewing Contract Projects 15
- Viewing Contract Items 16
- Viewing TDOT Variable Add-on Items per Specifications 18
- Viewing Contract Funding 25
- Viewing Subcontracts 27
- Preparing for Field Activities 30
- Understanding the Contract Master List 30
- Granting Contract Authority 37
- Verifying Association of Materials Sample and Testing Requirements 40
- Summary 41
- Review Exercise 47
Understanding New Contracts

New contracts are typically loaded electronically from the Preconstruction system into SiteManager with a pending status.

![Contract Records Panel](image)

Figure 1. Contract Records Panel

To begin tracking the progress of contract work in SiteManager, the Headquarters Finance Office will change the contract’s status to Active. This will trigger an automatic email notification to the District Supervisor, Office Staff and Regional Materials & Tests. Upon receipt of the notification, Office Staff will begin the contract activation and initialization process and Regional Materials will begin setting up contract materials.
Exercise 1

In this exercise, navigate to the Contracts window.

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

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

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

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

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

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

You’ve accessed the Contracts window.
Viewing Contracts

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

Contract Time Charges

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

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

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

- **Working Days (Available Days)** - TDOT does not use now.
Figure 3. Contracts Window - Remarks Window - Detail

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

Exercise 2

In this exercise, view the description of a contract.

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

1. View the information on the Description panel.

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

3. How is time calculated on this contract?

4. What is the dollar value of this contract?

You've viewed information about a contract.
Viewing the Contract Location

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

![Contracts Window - Location Panel](image)

**Figure 4. Contracts Window - Location Panel**

**Exercise 3**

In this exercise, view the location of a contract.

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

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

2. What is the primary county? ____________________________________

*You've viewed location information for a contract.*
Viewing Contract Payment Data

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

![Contracts Window - Payment Data Panel](image)

**Exercise 4**

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

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

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

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

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

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

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

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

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

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

HEADQUARTERS CONSTRUCTION AND FINANCE OFFICES UPDATE THE CRITICAL DATES PANEL.

HEADQUARTERS FINANCE OFFICE UPDATES THE NOTICE TO PROCEED DATE UPON RECEIVING THE STARTING NOTICE REPORT FROM THE OFFICE STAFF.
<table>
<thead>
<tr>
<th>SiteManager Critical Date Name</th>
<th>TDOT Term (if applicable)</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>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>Date the contract is fully executed (also known as, 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>Completion date established by the contract.</td>
</tr>
<tr>
<td>Price Adjustments Base Date</td>
<td>Typically, the first day of the month for the month preceding the Letting Date.</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 that a critical event occurred for the contract.

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

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

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

3. When did the Notice to Proceed Date occur? _________

4. When did the Original Completion Date occur? _______

You’ve viewed the actual dates that critical events occurred.
Viewing Contract Primary Personnel

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

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

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

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

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

Figure 7. Primary Personnel Panel
Exercise 6

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

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

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

2. Who is the project supervisor for this contract?

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

Viewing the Prime Contractor and Associates

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

Since TDOT does not record an insurance company for the prime contractor, the placeholder value, SITEMANAGER GENERIC INSURANCE, is substituted for a real value. TDOT will record actual associates for bonding and surety.
Exercise 7

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

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

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

2. Who is the prime contractor? __________________________

3. Which bonding company is used? _______________________

4. Which surety company is used? _________________________

You’ve viewed the prime contractor’s associates.
Viewing the DBE Commitment Goal

The DBE Commit panel displays the DBE commitments for a Contract. If the Prime Contractor is a DBE, the user can also enter the DBE Work Class on this panel. The system calculates the DBE commitment amounts displayed on this panel using values entered on the Subcontracts panel.

![Contracts Window - DBE Commit Panel]

Exercise 8

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

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

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

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

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

*You’ve viewed the DBE goal for a contract.*

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

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

![Projects Window - Description Panel](image)

**Exercise 9**

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

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

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

2. How many projects are on this contract? _____________________

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

4. Review the **Description** panel.

5. What is the project description? ______________________________

6. What is the route number? ________________________________

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

*You’ve viewed a project description.*
Viewing Contract Items

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

Figure 11. Items Window

ITEMS KNOWN AS “ADD-ON” ITEMS ARE ADDED TO THE CONTRACT BEFORE IT IS ASSIGNED TO THE REGION. THESE ADD-ON ITEMS ARE THE ADJUSTMENT ITEMS APPROPRIATE FOR THE ITEMS OF THAT CONTRACT. ONCE THE CONTRACT IS ACTIVATED, ALL ADDITIONAL ITEMS ARE ADDED USING THE CHANGE ORDER FUNCTION, EXCEPT FOR THE “ADD-ON” ITEMS LISTED IN THE NEXT SECTION THAT ARE ADDED BY HEADQUARTERS FINANCE.

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

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

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

DOES NOT REPRESENT “SPEC BOOK YEAR.”
Exercise 10

In this exercise, review contract items.

User ID  jj0002     Password  pass
Connection  Server
Group Name  FIELD – Operations Office Staff (OSTAFF)
Prior Keys  TRN350

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

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

Open an item.

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

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

5. What is the unit price? __________________________

6. What is the bid quantity? _______________________

Open another item.

7. Click Open.

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

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

10. What is the supplemental description? _______________________

You’ve reviewed contract items.

You've reviewed contract items.

LEAVE WINDOW OPEN FOR NEXT EXERCISE.
### Viewing TDOT Variable Add-on Items per Specifications

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

<table>
<thead>
<tr>
<th>Bid Item On Contract</th>
<th>Item Automatically Added To Contract</th>
<th>Item</th>
<th>Unit</th>
<th>Unit Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>203-01</td>
<td>203-01.03 ROAD &amp; DRAINAGE ADD'L MATERIAL</td>
<td>CUBIC YARD</td>
<td>203-01 PRICE X 150%</td>
<td></td>
</tr>
<tr>
<td>203-01</td>
<td>203-05 UNDERCUTTING</td>
<td>CUBIC YARD</td>
<td>203-01 PRICE X 150%</td>
<td></td>
</tr>
<tr>
<td>204-02.01</td>
<td>204-02.02 EXTRA DEPTH DRY EXCAVATION (A)</td>
<td>CUBIC YARD</td>
<td>204-02.01 PRICE X 150%</td>
<td></td>
</tr>
<tr>
<td>204-02.01</td>
<td>204-02.03 EXTRA DEPTH DRY EXCAVATION (B)</td>
<td>CUBIC YARD</td>
<td>204-02.01 PRICE X 180%</td>
<td></td>
</tr>
<tr>
<td>204-03.01</td>
<td>204-03.02 EXTRA DEPTH WET EXCAVATION (A)</td>
<td>CUBIC YARD</td>
<td>204-03.01 PRICE X 150%</td>
<td></td>
</tr>
<tr>
<td>204-03.01</td>
<td>204-03.03 EXTRA DEPTH WET EXCAVATION (B)</td>
<td>CUBIC YARD</td>
<td>204-03.01 PRICE X 180%</td>
<td></td>
</tr>
<tr>
<td>204-04.01</td>
<td>204-04.02 EXTRA DEPTH ROCK EXCAVATION (A)</td>
<td>CUBIC YARD</td>
<td>204-04.01 PRICE X 150%</td>
<td></td>
</tr>
<tr>
<td>204-04.01</td>
<td>204-04.03 EXTRA DEPTH ROCK EXCAVATION (B)</td>
<td>CUBIC YARD</td>
<td>204-04.01 PRICE X 180%</td>
<td></td>
</tr>
<tr>
<td>307 MIX ITEM</td>
<td>307-03.20 PRICE ADJUSTMENT FOR AC CONTENT</td>
<td>DOLLAR</td>
<td>$1.00</td>
<td></td>
</tr>
<tr>
<td>307 ASPHALT ITEM</td>
<td>307-05.40 LIQUID ANTI-STRIP AGENT PAYMENT</td>
<td>DOLLAR</td>
<td>$1.00</td>
<td></td>
</tr>
<tr>
<td>307 OR 411 ASPHALT ITEM</td>
<td>307-05.41 HYDRATED LIME ANT-STRIP AGENT PAY</td>
<td>DOLLAR</td>
<td>$1.00</td>
<td></td>
</tr>
<tr>
<td>407-07 DENSITY DEDUCTION</td>
<td>DOLLAR</td>
<td>$1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>407-09 A C CONTENT &amp; GRADATION DEDECUCTION</td>
<td>DOLLAR</td>
<td>$1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>411 MIX ITEM</td>
<td>411-03.20 PRICE ADJUSTMENT FOR AC CONTENT</td>
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<td>$1.00</td>
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<tr>
<td>411 ASPHALT ITEM</td>
<td>411-03.40 MATERIAL VARIATION DEDUCTION</td>
<td>DOLLAR</td>
<td>$1.00</td>
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<tr>
<td>411-05.40 LIQUID ANTI-STRIP AGENT PAYMENT</td>
<td>DOLLAR</td>
<td>$1.00</td>
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<td></td>
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<tr>
<td>411-05.41 HYDRATED LIME ANT-STRIP AGENT PAY</td>
<td>DOLLAR</td>
<td>$1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>501 ITEM</td>
<td>501-05-03 PRICE ADJ FOR RIDEABILITY (CONCRETE)</td>
<td>DOLLAR</td>
<td>$1.00</td>
<td></td>
</tr>
<tr>
<td>Bid Item On Contract</td>
<td>Item Automatically Added To Contract</td>
<td>Item</td>
<td>Unit</td>
<td>Unit Price</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------------------------</td>
<td>------</td>
<td>------</td>
<td>-----------</td>
</tr>
<tr>
<td>501-01.20, 501-01.21 OR 501-01.30</td>
<td>501-05-05 ADDL P’LAND CEMENT &amp; CONC (ULTRATHIN)</td>
<td>501-05-05</td>
<td>DOLLAR</td>
<td>$1.00</td>
</tr>
<tr>
<td>604-03.01</td>
<td>604-01.08 CLASS A CONC (FOUNDATION LEVELING)</td>
<td>604-01.08</td>
<td>CUBIC YARD</td>
<td>604-03.01 PRICE X 40%</td>
</tr>
<tr>
<td>CONCRETE ITEM (EXCLUDING 501 ITEMS)</td>
<td>604-22.50 DEFECTIVE CONCRETE</td>
<td>604-22.50</td>
<td>DOLLAR</td>
<td>$1.00</td>
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<tr>
<td>705-01.01</td>
<td>705-01.50 SHOP CURVED GRDRL @ BRIDGE ENDS</td>
<td>705-01.50</td>
<td>LINEAR FEET</td>
<td>705-01.01 PRICE X 125%</td>
</tr>
<tr>
<td>705-12.02</td>
<td>705-01.51 SHOP CRV GRDRL @ BR END (LONG POST)</td>
<td>705-01.51</td>
<td>LINEAR FEET</td>
<td>705-12.02 PRICE X 125%</td>
</tr>
<tr>
<td>705-02.02</td>
<td>705-02.50 SHOP CURVED GUARDRAIL</td>
<td>705-02.50</td>
<td>LINEAR FEET</td>
<td>705-02.02 PRICE X 150%</td>
</tr>
<tr>
<td>705-02.03</td>
<td>705-02.51 SHOP CURVED GUARDRAIL (LONG POST)</td>
<td>705-02.51</td>
<td>LINEAR FEET</td>
<td>705-02.03 PRICE X 150%</td>
</tr>
<tr>
<td>801-01 WITHOUT 801-02</td>
<td>801-02 SEEDING WITHOUT MULCH</td>
<td>801-02</td>
<td>UNIT</td>
<td>801-01 PRICE X 45%</td>
</tr>
<tr>
<td>801-01 WITHOUT 801-06</td>
<td>801-06 MULCH</td>
<td>801-06</td>
<td>UNIT</td>
<td>801-01 PRICE X 60%</td>
</tr>
</tbody>
</table>

Table 2. TDOT Add-on Items per Specifications
TDOT Add-on Items (Before Contract is Activated) per Special Provisions

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Unit Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>105-02</td>
<td>FLAGGING ADJUSTMENT</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>105-03</td>
<td>RAILROAD FLAGGING (DEDUCT)</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>108-01.01</td>
<td>NO EXCUSE BONUS</td>
<td>LUMP SUM</td>
</tr>
<tr>
<td>108-07</td>
<td>LIQUIDATED DAMAGES</td>
<td>DAY</td>
</tr>
<tr>
<td>108-07.01</td>
<td>LIQUIDATED DAMAGES</td>
<td>WEEK</td>
</tr>
<tr>
<td>108-07.02</td>
<td>LIQUIDATED DAMAGES</td>
<td>%</td>
</tr>
<tr>
<td>108-08.01</td>
<td>LIQUIDATED DAMAGES (MOWING)</td>
<td>DAY</td>
</tr>
<tr>
<td>108-08.02</td>
<td>LIQUIDATED DAMAGES (LITTER)</td>
<td>LINEAR MILE</td>
</tr>
<tr>
<td>108-08.03</td>
<td>LIQUIDATED DAMAGES (SWEEPING)</td>
<td>LINEAR MILE</td>
</tr>
<tr>
<td>108-08.04</td>
<td>LIQUIDATED DAMAGES</td>
<td>HOUR</td>
</tr>
<tr>
<td>108-08.05</td>
<td>LIQUIDATED DAMAGES</td>
<td>LANE</td>
</tr>
<tr>
<td>108-08.06</td>
<td>LIQUIDATED DAMAGES</td>
<td>WEEKEND</td>
</tr>
<tr>
<td>108-08.07</td>
<td>LIQUIDATED DAMAGES</td>
<td>15 MINUTES</td>
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<td>108-08.08</td>
<td>LIQUIDATED DAMAGES</td>
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<td>LIQUIDATED DAMAGES</td>
<td>EACH</td>
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</tr>
<tr>
<td>108-10.21</td>
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<td>HOUR</td>
</tr>
</tbody>
</table>

HQ ADDS THESE PRIOR TO CONTRACT ACTIVATION.
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Unit Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>108-10.22</td>
<td>DISINCENTIVE PAYMENT</td>
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<td>108-10.23</td>
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<tr>
<td>108-10.25</td>
<td>DISINCENTIVE PAYMENT</td>
<td>HOUR</td>
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<tr>
<td>108-10.26</td>
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<td>108-10.61</td>
<td>DISINCENTIVE PAYMENT</td>
<td>WEEKEND</td>
</tr>
<tr>
<td>Item</td>
<td>Description</td>
<td>Unit Measure</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>108-10.62</td>
<td>DISINCENTIVE PAYMENT WEEKEND</td>
<td></td>
</tr>
<tr>
<td>108-10.63</td>
<td>DISINCENTIVE PAYMENT WEEKEND</td>
<td></td>
</tr>
<tr>
<td>108-10.64</td>
<td>DISINCENTIVE PAYMENT WEEKEND</td>
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</tr>
<tr>
<td>108-10.65</td>
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<td>DISINCENTIVE PAYMENT WEEKEND</td>
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<td>108-10.68</td>
<td>DISINCENTIVE PAYMENT WEEKEND</td>
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</tr>
<tr>
<td>108-10.69</td>
<td>DISINCENTIVE PAYMENT WEEKEND</td>
<td></td>
</tr>
<tr>
<td>108-11</td>
<td>ACCELERATED SCHEDULE INCENTIVE PAYMENT LUMP SUM</td>
<td></td>
</tr>
<tr>
<td>109-01.01</td>
<td>PAYMENT ADJUSTMENT FOR FUEL DOLLAR</td>
<td></td>
</tr>
<tr>
<td>109-01.02</td>
<td>PAYMENT ADJUSTMENT FOR BITUMINOUS MATERIAL DOLLAR</td>
<td></td>
</tr>
<tr>
<td>407-10</td>
<td>ASPHALT CEMENT CONTENT &amp; GRADATION DEDUCTION DOLLAR</td>
<td></td>
</tr>
<tr>
<td>411-03.30</td>
<td>RIDEABILITY DEDUCTION DOLLAR</td>
<td></td>
</tr>
<tr>
<td>411-03.32</td>
<td>RIDEABILITY (SPECIAL PROVISION 411B) DOLLAR</td>
<td></td>
</tr>
<tr>
<td>602-04</td>
<td>STEEL INSPECTION COST DOLLAR</td>
<td></td>
</tr>
<tr>
<td>604-22.50</td>
<td>DEFECTIVE CONCRETE DOLLAR</td>
<td></td>
</tr>
<tr>
<td>604-23.01</td>
<td>RIDEABILITY DEDUCTION (BRIDGES) DOLLAR</td>
<td></td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Unit Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>108-09.01</td>
<td>DAMAGE TO STATE PROPERTY</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>108-09.02</td>
<td>DAMAGE TO STATE PROPERTY</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>108-09.03</td>
<td>DAMAGE TO STATE PROPERTY</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>108-09.04</td>
<td>DAMAGE TO STATE PROPERTY</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>108-09.05</td>
<td>DAMAGE TO STATE PROPERTY</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>108-09.06</td>
<td>DAMAGE TO STATE PROPERTY</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>108-09.07</td>
<td>DAMAGE TO STATE PROPERTY</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>108-09.08</td>
<td>DAMAGE TO STATE PROPERTY</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>108-09.09</td>
<td>DAMAGE TO STATE PROPERTY</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>108-99</td>
<td>COST OF WORK DONE BY STATE FORCES</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>109-05.01</td>
<td>ELIMINATED OR ALTERED ITEM</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>109-05.02</td>
<td>ELIMINATED OR ALTERED ITEM</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>109-05.03</td>
<td>ELIMINATED OR ALTERED ITEM</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>109-05.04</td>
<td>ELIMINATED OR ALTERED ITEM</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>109-05.05</td>
<td>ELIMINATED OR ALTERED ITEM</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>109-05.06</td>
<td>ELIMINATED OR ALTERED ITEM</td>
<td>DOLLAR</td>
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<tr>
<td>109-05.07</td>
<td>ELIMINATED OR ALTERED ITEM</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>109-05.08</td>
<td>ELIMINATED OR ALTERED ITEM</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>109-05.09</td>
<td>ELIMINATED OR ALTERED ITEM</td>
<td>DOLLAR</td>
</tr>
<tr>
<td>501-05.01</td>
<td>ADDITIONAL PORTLAND CEMENT CONCRETE (RAMP PAVING)</td>
<td>CUBIC YARD</td>
</tr>
<tr>
<td>501-05.02</td>
<td>PRICE ADJUSTMENT FOR RIDEABILITY (%)</td>
<td>SQUARE YARD</td>
</tr>
<tr>
<td>501-05.04</td>
<td>THICKNESS DEFICIENCY (%)</td>
<td>SQUARE YARD</td>
</tr>
<tr>
<td>604-01.06</td>
<td>CLASS A CONCRETE ADJUSTMENT (INCREASE)</td>
<td>CUBIC YARD</td>
</tr>
<tr>
<td>604-01.07</td>
<td>CLASS A CONCRETE ADJUSTMENT (DECREASE)</td>
<td>CUBIC YARD</td>
</tr>
<tr>
<td>606-02.04</td>
<td>STEEL PILES (10 INCH)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-03.04</td>
<td>STEEL PILES (12 INCH)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-04.04</td>
<td>STEEL PILES (14 INCH)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-05.04</td>
<td>UNTREATED TIMBER PILES (SIZE 1)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-06.04</td>
<td>UNTREATED TIMBER PILES (SIZE 2)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-07.04</td>
<td>TREATED TIMBER PILES (SIZE 1)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
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<td>606-08.04</td>
<td>TREATED TIMBER PILES (SIZE 2)(CUT-OFFS)</td>
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</tr>
<tr>
<td>606-09.04</td>
<td>PRECAST CONCRETE PILES (SIZE 1)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-10.04</td>
<td>PRECAST CONCRETE PILES (SIZE 2)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-15.05</td>
<td>18&quot; PRESTR CONC PILES (CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-16.04</td>
<td>STEEL PIPE PILES (10-INCH)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-17.04</td>
<td>STEEL PIPE PILES (12-INCH)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>Item</td>
<td>Description</td>
<td>Unit Measure</td>
</tr>
<tr>
<td>---------</td>
<td>--------------------------------------------------</td>
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</tr>
<tr>
<td>606-18.04</td>
<td>STEEL PIPE PILES (14-INCH)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-19.04</td>
<td>STEEL PIPE PILES (16-INCH)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-20.04</td>
<td>STEEL PIPE PILES (18-INCH)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-20.40</td>
<td>STEEL PIPE PILES (CUT-OFFS) (SIZE)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-21.40</td>
<td>STEEL PIPE PILES (CUT-OFFS) (SIZE)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>606-23.02</td>
<td>STEEL PIPE PILES (24-INCH)(CUT-OFFS)</td>
<td>LINEAR FEET</td>
</tr>
<tr>
<td>619-01.02</td>
<td>POLYMER MODIFIED CONC (VARIABLE DEPTH-TYPE 1)</td>
<td>CUBIC YARD</td>
</tr>
<tr>
<td>619-01.03</td>
<td>POLYMER MODIFIED CONC (VARIABLE DEPTH-TYPE 3)</td>
<td>CUBIC YARD</td>
</tr>
</tbody>
</table>

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

Upon notification by Operations Field Office, Headquarters Finance will add add-on items without a change order.

The New Contract Change Order Item Function is used to add new items not covered by standard specifications or special provisions.

**Exercise 11**

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

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

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

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

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

4. What is the unit price? ____________________________

5. What is the bid quantity? ___________________________

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

You’ve viewed another contract item.
**Viewing Contract Funding**

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

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

![Contract Funding Window (example 1, non-standard funding)](image)

Figure 12. Contract Funding Window (example 1, non-standard funding)
Activating Contracts for Office Documentation

Figure 13. Contract Funding Window (example 2, non-standard funding)

THE CONTRACT FUNDING WINDOW IS LOADED FROM PRECONSTRUCTION.

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

Exercise 12

In this exercise, view the Contract Funding window.

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

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

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

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

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

You’ve viewed the funding for a contract.
Viewing Subcontracts

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

![Subcontract Panel](image)

**Figure 14. 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.

Subcontract Descriptions

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

The percentage of the subcontract that can be counted towards the contract’s DBE goal depends on the subcontract’s level, the subcontractor’s DBE status, and whether the subcontract includes Items. A parent subcontract with a DBE subcontractor and items is always counted 100% towards the contract’s DBE goal. If the subcontract has no items (that is, the subcontractor is a supplier/hauler), the user enters the percentage counted towards the DBE goal. For nested subcontracts, if a higher-level DBE subcontract is counted 100% towards the DBE goal, the percentage of the nested subcontract is always zero.
Exercise 13

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

User ID: jj00002  
Password: pass

Connection: Server

Group Name: FIELD – Operations Office Staff (OSTAFF)

Prior Keys: TRN350

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

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

3. On the **Contractor Management** panel, double-click the **Subcontracts** icon. The system displays the Select Contract ID window.

4. How many subcontracts are there for this contract?

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

6. In the **Subcontract** area, in the **SubCont Nbr** column, scroll to and double-click **00000001**. The system displays the Subcontracts window.

7. What is the approval date for this subcontract?

8. Is this a “nested” subcontract?

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

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

Figure 15. Subcontracts Window - Items Panel

Exercise 14

In this exercise, view a subcontract item.

User ID jj0002 Password pass
Connection Server
Group Name FIELD – Operations Office Staff (OSTAFF)
Prior Keys TRN350

1. On the Subcontracts window, click the Items tab. The system displays the Items panel.

2. How many items are on this subcontract? ________________

3. What is the total quantity and dollar amount on this subcontract for item 501-01.03 PORTLAND CEMENT CONCRETE PAVEMENT (PLAIN) 10” on project 67004-3213-14 and line item 0850.

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

You’ve viewed a subcontract item.
Preparing for Field Activities

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

AFTER THE TDOT HEADQUARTERS CONSTRUCTION AND FINANCE OFFICES HAVE COMPLETED THEIR CONTRACT ACTIVATION ACTIVITIES, AN EMAIL NOTIFICATION WILL BE SENT TO OFFICE STAFF RELEASING THE CONTRACT TO BEGIN FIELD PREPARATION ACTIVITIES.

THESE ARE THE MINIMUM ACTIVITIES THAT MUST OCCUR TO MAKE IT POSSIBLE FOR THE FIELD INSPECTION STAFF TO PIPELINE AND BEGIN FIELD REPORTING: UPDATE CONTRACT MASTER LIST; GRANT CONTRACT AUTHORITY TO FIELD STAFF, IF NECESSARY; AND VERIFY ASSOCIATION OF MATERIALS SAMPLE AND TESTING REQUIREMENTS TO THE CONTRACT. UPON COMPLETION OF THE FIELD PREPARATION ACTIVITIES BY THE OFFICE STAFF AND THE CONFIRMATION OF THE MATERIALS GENERATION OFFICE STAFF WILL ENTER THE ACTUAL DATE OF THE ‘FIELD PREP COMPLETE’ KEY DATE.

Understanding the Contract Master List

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

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

USE THE CONTRACT MASTER LIST TO ASSOCIATE THE FOLLOWING FOR THE PRIME CONTRACTOR AND SUBCONTRACTORS ON A CONTRACT: EQUIPMENT, PERSONNEL, AND STAFF MEMBER.

EQUIPMENT AND PERSONNEL WILL BE ASSOCIATED FOR THE PRIME CONTRACTOR AND ALL SUBCONTRACTORS AT THE BEGINNING OF THE PROJECT AND FOR ALL ADDITIONAL SUBCONTRACTORS ADDED THROUGHOUT THE LIFE OF THE CONTRACT.

UPON SUBCONTRACT APPROVAL FROM HQ CONSTRUCTION AN EMAIL NOTIFICATION WILL BE SENT TO THE DESIGNATED OFFICE STAFF. AT THIS TIME, EQUIPMENT AND PERSONNEL ASSOCIATIONS FOR THE SUBCONTRACTOR SHALL BE MADE.

THE SUPERVISOR MASTER LIST FUNCTION WILL NOT BE USED.
Exercise 15

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

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

1. Click the Main Panel tab. The system displays the Main Panel panel.
2. Double-click the Daily Work Reports icon. The system displays the Daily Work Reports panel.
3. Double-click the Reference Tables icon. The system displays the Reference Tables panel.
4. Double-click the Contract Master List icon. The system displays the Select Contract Vendor window.
5. In the Contract ID area, in the Contract ID column, scroll to and double-click TRN350.
6. In the Vendor area, scroll to and double-click Highways, Inc.

You’ve opened the contract master list for a contract’s vendor.
**Associating Vendor Equipment with the Contract**

Only the *active* equipment that has been added to the vendor master list may be associated with the contract.

![Contract Master List Window - Equipment Panel](image)

**Exercise 16**

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

User ID: jj00002  
Password: pass

Connection: Server  
Group Name: FIELD – Operations Office Staff (OSTAFF)  
Prior Keys: TRN350

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

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

3. **Save.**

*You’ve associated vendor’s equipment to the contract master list.*
Associating Vendor Personnel Types with the Contract

Only the *active* personnel types that have been added to the vendor master list may be associated with the contract.

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

**Exercise 17**

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

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00002</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 Office Staff (OSTAFF)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>TRN350</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Click the **Personnel** button.

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

3. **Save.**

   *You’ve associated vendor’s personnel types to the contract master list.*
Associating Staff Members with the Contract

Only the active staff members that have been added to the vendor master list may be associated with the contract.

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

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

THE SSN/SIN WILL BEGIN WITH THE FIRST FOUR DIGITS OF THE DISTRICT OFFICE FOR STATE EMPLOYEES AND A SIX (6) FOR CONSULTANTS.
Exercise 18

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

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

1. Click the Staff Member button.

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

3. Press and hold down the Shift key.

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

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

6. Save.

You’ve associated a vendor’s agency staff to the contract master list.
Contract Master List and Subcontractors

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

Exercise 19

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

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

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

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

Associate the equipment.

3. Click the Equipment button.

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

5. Save.

Associate the personnel.

6. Click the Personnel button.

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

8. Save.

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

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

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

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

Adding Users to Contract Authority

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

Figure 19. Contract Authority Window

When granting contract authority to an inspector, authority must be granted for both inspector and inspector – standalone groups.

Contract authority is only necessary when TDOT users are working outside their normal office or for any consultants.

By default, staff members have office-wide access and will not require contract authority granted manually.

Office-wide contract authority can be removed by contacting regional support. District supervisors and office staff can assign and remove contract authority.
Exercise 20

In this exercise, grant and end contract authority.

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

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

2. Double-click the Contract Records icon. The system displays the Contract Records panel.


Give a user authority for a contract.

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

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

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

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

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

9. Click OK.

10. Save.

EXERCISE WILL ASSOCIATE CONTRACT AUTHORITY FOR AN INSPECTOR THAT DOES NOT HAVE OFFICE-WIDE CONTRACT AUTHORITY. PRESUME THIS INSPECTOR HAS OFFICE-WIDE ACCESS FOR A DIFFERENT OFFICE.
End contract authority for another user.

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

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

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

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

*You’ve managed users’ contract authority.*
Verifying Association of Materials Sample and Testing Requirements

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

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

Contracted Materials are ready on 01/18/2014 for Contract ID CN0350 by Regional Materials.

Figure 20. Example “Contract Materials are Ready” Email

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

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

- Updating Contract Master List
- Granting Contract Authority to Field Staff working outside their assigned unit and consultants
- Verifying association of Materials Sample & Testing Requirements
- Field Prep Complete key date is entered

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

STRESS IMPORTANCE!
Summary

To open a contract from the Contracts window:

1. On the Main Panel, double-click the **Contract Administration** icon.
2. Double-click the **Contract Records** icon.
3. Double-click the **Contracts** icon. The system displays the Contracts window.
4. Click **Open**. The system displays the Select Contract window.
5. Scroll to and double-click the Contract ID or perform a Find. The system closes the Select Contract window and displays the Contracts window.

To view a contract’s description:

1. Open a contract.
2. On the Contracts window, click the **Description** tab.

To view a contract’s location:

1. Open a contract.
2. On the **Contracts** window, click the **Location** tab.

To view a contract’s payment data:

1. Open a contract.
2. On the **Contracts** window, click the **Payment Data** tab.

To view the actual date of a contract critical date:

1. Open a contract.
2. On the **Contracts** window, click the **Critical Dates** tab.
3. In the **Critical Date Description** list box, scroll to and click the date. The system displays the data for the selected date in the lower pane.
To view a contract’s primary personnel:

1. Open a contract.
2. On the Contracts window, click the Primary Personnel tab.

To view a contract’s prime contractor:

1. Open a contract.
2. On the Contracts window, click the Prime Contractor tab.

To view a contract’s DBE goal:

1. Open a contract.
2. On the Contracts window, click the DBE Commit tab.

To view a project on a contract:

1. On the Main Panel panel, double-click the Contract Administration icon.
2. Double-click the Contract Records icon.
3. Double-click the Projects icon. The system displays the Projects window.

To view an item on a contract:

4. On the Main Panel panel, double-click the Contract Administration icon.
5. Double-click the Contract Records icon.
6. Double-click the Items icon. The system displays the Items window.
7. Click Open.
8. In the Contract ID area, scroll to and double-click the desired contract. The system displays the projects for the selected contract.
9. In the Project area, scroll to and click the desired project.
10. In the Contract Item area, scroll to and click the desired item.
11. Click OK. The system displays the Items window and the data for the selected item.
To view contract funding:

1. On the **Contract Records** panel, double-click the **Funding** icon.
2. In the **Contract ID** list box, double-click the contract.
3. Click **OK**.

To view a subcontract:

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

To view an item on a subcontract:

1. On the **Contractor Management** panel, double-click the **Subcontracts** icon. The system displays the Subcontracts window.
2. Click **Open**.
3. In the **Contract ID** column, scroll to and double-click the contract.
4. In the **Subcontract** column, scroll to and click the subcontract.
5. Click **OK**. The system displays data for the selected subcontract.
6. Click the **Items** tab.

To open the Contract Master List:

1. On the **Main Panel**, double-click the **Daily Work Reports** icon.
2. Double-click the **Reference Tables** icon.
3. Double-click the **Contract Master List** icon. The system displays the Select Contract Vendor window.
4. In the **Contract ID** column, scroll to and double-click the desired contract.
5. In the **Vendor** column, scroll to and double-click the desired vendor. The system displays the Contract Master List window.
To associate Vendor Master List equipment to a contract:

1. Open the Contract Master List window.
2. Click the Equipment button.
3. Click the Add All button to add all the Vendor Master List data.
   or
   Select the desired equipment and click the Add button to add that single selection.
4. Save.

To associate Vendor Master List personnel types to a contract:

1. Open the Contract Master List window.
2. Click the Personnel button.
3. Click the Add All button to add all the Vendor Master List data.
   or
   Select the desired personnel and click the Add button to add that single selection.
4. Save.

To associate staff members to a contract:

1. Open the Contract Master List window.
2. Click the Staff Member button.
3. Click the Add All button to add all the Vendor Master List data.
4. Save.
To add contract authority to a user:

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

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

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

4. Select the desired user ID.

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

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

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

8. **Save**.

To end contract authority for a user:

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

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

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

4. Select the desired user ID.

5. Select the desired contract authority assignment.

6. From the **Services** menu, click **End Contract Authority**.
To update a key date record:

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

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

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

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

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

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

7. **Save.**
Review Exercise

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

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

1. Navigate to Contracts window.
2. Open contract TRN349.
3. To which region and unit is the contract assigned?
   ___________________________________________
4. What is the execution date of the contract?
   ___________________________________________
5. What is the surety company?
   ___________________________________________
6. Navigate to the Contract Item window.
7. Open the item 621-03.04 described as 30” TEMPORARY DRAINAGE PIPE for contract TRN349, project 67004-3213-14, category number 0100 and line number 1090.
8. Is the item an add-on item and how can you tell?
   ___________________________________________
9. Navigate to the Contractor Management panel.
10. Open the Subcontracts window. For contract TRN349, open subcontract 00000003.
11. Who is the subcontractor?
    ___________________________________________
12. Is the subcontractor a DBE? ___________________________
13. Could the subcontractor begin working? _________________
14. Navigate to the Main Panel panel.
15. Navigate to the Daily Work Reports panel and to the Reference Tables (DWR+) panel and open the Contract Master List window.
16. For the prime contractor of contract TRN349, Highways, Inc, associate all the equipment, all the personnel, and the staff members for Region 2, Unit 723.

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

18. Navigate to the Contract Authority window.


20. Save.

21. Exit SiteManager.

You’ve viewed and prepared a contract for the field.
Initializing Contracts for Office Documentation

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

- Understanding Key Dates and Checklist Events 4
- Scheduling Key Dates 5
- Scheduling Checklist Event Projected Dates 9
- Starting Milestones 13
- Summary 15
- Review Exercise 18
After the Office Staff has completed preparations for field activities and released the contract to its field inspection staff so that field reporting can begin, additional contract initialization activities shall be performed before the first estimate can be processed.

These activities include:

- Schedule Key Dates
- Schedule Checklist Event Dates
- Enter the Work Start Key Date.
- Generate the Starting Notice Report

**Dates in SiteManager**

Since dates are very important in the life of a highway construction contract, they are important in SiteManager. Four of the most important types of dates in SiteManager are:

- Critical Dates (of the Contract window)
- 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.

![Figure 1. Recipients Entered Here Will Be Notified for Each Event](image)

CRITICAL DATES ARE NOT UPDATED BY FIELD PERSONNEL.

TDOT USES RECIPIENTS ONLY AND NOT DISTRIBUTION LISTS.
<table>
<thead>
<tr>
<th>Date Type</th>
<th>When the Message Is Sent</th>
<th>To Whom the Message Is Sent</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 indicated.</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>
</tr>
<tr>
<td></td>
<td>When a value is entered in the Actual Date Field by a User.</td>
<td>In-box of Recipient indicated.</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 indicated.</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>
</tr>
</tbody>
</table>

Table 1. SiteManager Dates
Understanding Key Dates and Checklist Events

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

- **Key Dates** are dates that are important when they occur and when they do not occur. A single recipient is notified when a key date is accomplished and the project manager is notified when a key date is not accomplished by the projected date. A key date can be set up to be required either when the contract is activated or when it is finalized. The user creates the key date schedule and records the actual occurrences of key dates on the Key Dates window.

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

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

The Key Dates window displays the key dates for the selected contract in the top pane and the data for the selected key date in the bottom pane. The key date types are pre-defined in the system code tables. The system adds a set of default key dates automatically to each new contract. The user creates the key date schedule and records the actual occurrence of key dates on this window. The user can add, modify, and delete default key dates.

![Key Dates Window](image)

Figure 2. Key Dates Window

The Key Dates window is used by office staff and regional materials and tests to schedule projected dates and enter actual dates.

All default key dates will appear for the contract when the contract is loaded into SiteManager. As part of the contract activation process, the office staff personnel will perform the following functions:

- Delete key dates that do not apply to the contract
- Enter the projected date for each key date
- Enter the actual date for the starting notice key date

Upon receipt of the starting notice report, the headquarters finance office will update the critical dates window with the notice to proceed date and work begin date. Office staff will enter the starting notice key date in SiteManager prior to generating this report.

Until the notice to proceed date is entered, field data collection can begin, but estimates cannot be generated.
<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 1

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

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

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

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

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

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

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

Delete an unnecessary key date record.

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

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

8. In the message, click Yes.
Update a key date record.

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

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

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

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

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

14. **Save**.

Update another key date record.

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

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

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

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

19. **Save**.

20. Why provide a projected date for this event?

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

*You’ve accessed the Key Dates window and updated key date records.*
Scheduling Checklist Event Projected Dates

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

For example:

- Add a checklist event when the event type needed is not listed.
- Delete an unneeded checklist event.
- Change an existing checklist event, such as modifying the frequency of the event.

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

**Figure 3. Checklist Scheduled Events Window**
THE OFFICE STAFF USES THE CHECKLIST SCHEDULED EVENTS WINDOW TO CREATE THE CHECKLIST EVENT SCHEDULE.

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

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

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

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

- ENTER THE APPROPRIATE RECIPIENT.

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

<table>
<thead>
<tr>
<th>Checklist Event</th>
<th>Event Group Type</th>
<th>Frequency</th>
<th>Recipient</th>
<th>Who Enters Next Date</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attestation for Illegal Immigrants</td>
<td>Contractor</td>
<td>Semi-Annually</td>
<td>District Supervisor designee</td>
<td>FIELD – Operations Office Staff</td>
<td>Next Projected Date = First day of the applicable event month (January 01 or July 01)</td>
</tr>
<tr>
<td>Contractor’s Employee Interview</td>
<td>Civil Rights</td>
<td>Monthly</td>
<td>District Supervisor designee</td>
<td>FIELD – Operations Office Staff</td>
<td>Next Projected Date = First day of the month of the Effective Date</td>
</tr>
<tr>
<td>Contractor’s Payrolls</td>
<td>Contractor</td>
<td>Monthly</td>
<td>District Supervisor designee</td>
<td>FIELD – Operations Office Staff</td>
<td>Next Projected Date = First day of the month of the Effective Date</td>
</tr>
<tr>
<td>Contractor ESHP Cert – CL 107-01.01</td>
<td>Contractor</td>
<td>One Time Only</td>
<td>District Supervisor designee</td>
<td>FIELD – Operations Office Staff</td>
<td>Next Projected Date = Effective Date of the Contract Change the “Frequency Type” field from “One Time Only” to anything else (e.g. Weekly). Enter “1” in the “Number of Occurrences” field, change the “Frequency Type” to “One Time Only,” and proceed.</td>
</tr>
<tr>
<td>Checklist Event</td>
<td>Event Group Type</td>
<td>Frequency</td>
<td>Recipient</td>
<td>Who Enters Next Date</td>
<td>Comment</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>------------------</td>
<td>-----------</td>
<td>--------------------------------</td>
<td>--------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Contractor Performance Evaluation</td>
<td>Contractor Management</td>
<td>Annually</td>
<td>District Supervisor designee</td>
<td>FIELD – Operations Office Staff</td>
<td>Next Projected Date = First day of the applicable event month (end of year or completion of project)</td>
</tr>
<tr>
<td>Critical Path Method</td>
<td>Contractor Management</td>
<td>Monthly</td>
<td>District Supervisor designee</td>
<td>FIELD – Operations Office Staff</td>
<td>Next Projected Date = Effective Date</td>
</tr>
<tr>
<td>DBE Signed Subcontract(s) on File</td>
<td>Civil Rights</td>
<td>One Time Only</td>
<td>District Supervisor designee</td>
<td>FIELD – Operations Office Staff</td>
<td>Next Projected Date = Effective Date Change the “Frequency Type” field from “One Time Only” to anything else (e.g. Weekly). Enter “1” in the “Number of Occurrences” field, change the “Frequency Type” to “One Time Only,” and proceed.</td>
</tr>
<tr>
<td>On the Job Training</td>
<td>Civil Rights</td>
<td>One Time Only</td>
<td>District Supervisor designee</td>
<td>FIELD – Operations Office Staff</td>
<td>Next Projected Date = Effective Date Change the “Frequency Type” field from “One Time Only” to anything else (e.g. Weekly). Enter “1” in the “Number of Occurrences” field, change the “Frequency Type” to “One Time Only,” and proceed.</td>
</tr>
<tr>
<td>Prompt Payment to Subcontractors</td>
<td>Contractor Management</td>
<td>Monthly</td>
<td>District Supervisor designee</td>
<td>FIELD – Operations Office Staff</td>
<td>Next Projected Date = First day of the second month following the Effective Date</td>
</tr>
<tr>
<td>Traffic Control Checklist</td>
<td>Safety</td>
<td>Monthly</td>
<td>District Supervisor designee</td>
<td>FIELD – Operations Inspector</td>
<td>Next Projected Date = First day of the month following the Effective Date</td>
</tr>
</tbody>
</table>

Table 3. TDOT Default Checklist Events
Exercise 2

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

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

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

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

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

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

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

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

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

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

9. Click OK.

10. Save.

Schedule an additional checklist event.

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

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

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


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

17. **Save**.

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

*You’ve scheduled checklist events.*

## Starting Milestones

Use the Milestones window to modify and delete contract milestones.

### Milestone Time Charges

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

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

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

![Milestones Window](image)

*Figure 4. Milestones Window*
FOR OFFICE STAFF TO START MILESTONES, HQ FINANCE MUST FIRST CREATE THE MILESTONES.

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

Exercise 3

In this exercise, start milestones for a contract.

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

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

Start a milestone.

2. In the upper pane, in the Mlstn Nbr column, select 01.
3. In the lower pane, in the Work Start field, type 090914.
4. Save.

Start another milestone.

5. In the upper pane, in the Mlstn Nbr column, select 02.
6. In the lower pane, in the Work Start field, type 111014.
7. Save.
8. Close. The system closes the Milestones window and displays the SiteManager Panel window.
9. Click the Contract Administration tab. The system displays the Contract Administration panel.

You’ve started milestones.
Summary

To schedule a checklist event:

1. On the **Contract Records** panel, double-click the **Checklist Scheduled Events** icon.
2. On the **Event Group Type** dropdown list, select the desired event group type.
3. On the **Frequency Type** dropdown list, select the desired frequency type. *If the frequency type is either monthly, weekly, or bi-weekly, the Event Day field is enabled.*
4. If the **Event Day** field is enabled, type the corresponding day of the week (2-6) or day of the month (1-31).
5. In the **Next Proj Date** field, type the next date this scheduled event is expected to occur.
6. In the **Nbr of Occurrences** field, type number of times this scheduled event will occur.
7. To generate a discrepancy if the event has not occurred by the time of estimate generation, select the **Discrepancy** check box.
8. If the event is a document, on the **Required Doc Type** dropdown list, click the required document type.
9. If the required document is expected from an external source, select the **External Indicator** check box.

-or-

10. Press the **Tab** key.
11. In the **Message Text** field, type a short message that is sent to the Distribution List or Recipient when the scheduled event Actual Date is not completed by the Next Projected Date.
12. **Save.**
To schedule a key date:

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

2. In the **Key Date Type** column, select the desired key date type.

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

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

-or-

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

5. **Save.**

To delete a key date:

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

2. In the **Key Date Type** column, select the desired key date type.

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

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

5. **Save.**
To start a milestone:

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

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

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

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

5. **Save**.
Review Exercise

In this exercise, perform contract initialization activities.

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<thead>
<tr>
<th>User ID</th>
<th>jj0002</th>
<th>Password</th>
<th>pass</th>
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<tr>
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</tr>
<tr>
<td>Prior Keys</td>
<td>TRN350</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

2. Navigate to the Key Dates window and enter the following for contract **TRN349**:
   - For **Starting Notice Date Type**, enter a projected date of **05/01/14**.
   - For **Starting Notice Date Type**, enter an actual date of **05/17/14**.
   - For the **Recipient**, search and select **jj00002 Nopps, Jamie**.

3. Navigate to the Checklist Scheduled Events window for contract **TRN349**.
   - Select the **DBE Signed Subcontract(s)**.
   - Select **Milestone No. 03**.
   - Enter **05/18/14** as the **Next Projected Date**.
   - For the **Recipient**, search and select **jj00002 Nopps, Jamie**.

4. Open the Milestones window and enter the following for contract **TRN349**:
   - For **Milestone 03**, enter a **Start Date** of **06/20/14**.
   - For **Milestone 06**, enter a **Start Date** of **06/01/14**.

5. **Save**.

6. **Exit SiteManager**.
Maintaining Contracts for Office Documentation

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

- Recording Actual Dates of Checklist Events 2
- Adding Stockpiled Materials 4
- Replenishing Stockpiles 6
- Closing Out Stockpile Balances 8
- Entering a Materials Sample Record for T2 Certifications 10
- Summary 17
- Review Exercise 19
Recording Actual Dates of Checklist Events

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

![Checklist Event Dates Window](image)

Figure 1. Checklist Event Dates Window
Exercise 1

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

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

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

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

3. Double-click the Contract Records icon. The system displays the Contract Records panel.

4. Double-click the Checklist Event Dates icon. The system displays the Select Contract window.

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

Provide an actual date for an event.

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

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

8. Save.

Provide an actual date for another event.

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

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

11. Save.


You’ve recorded actual dates of checklist scheduled events.
Adding Stockpiled Materials

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

Preparing to Add Stockpiles

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

- Which contract items include the invoiced material?
- How much of the total invoiced material to allocate to each contract item?
- How many units of material are included in one unit of the pay item (the conversion factor)?

From these numbers, the user can calculate the values to enter in the fields of the Stockpiled Materials panel.
IT IS IMPORTANT TO INCLUDE THE ITEM NUMBER AND ITEM DESCRIPTION IN THE STOCKPILED MATERIAL
DESCRIPTION FIELD. THIS WILL MAKE IT EASIER TO IDENTIFY THE STOCKPILE LATER.

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

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

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

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

Exercise 2

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

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00002</th>
<th>Password</th>
<th>pass</th>
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<td>Group Name</td>
<td>FIELD - Operations Office Staff [OSTAFF]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keys</td>
<td>TRN350</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Choose the keys.

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

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

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

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

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

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

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

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

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

11. Click the **Pound** choice.

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

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

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

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

16. **Save**.

You’ve created a stockpiled material record.

Replenishing Stockpiles

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

![Stockpiled Materials Window](image)

**Figure 3. Stockpiled Materials Window**
**Exercise 3**

In this exercise, learn to replenish stockpiled material.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00002</th>
<th>Password</th>
<th>pass</th>
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<tr>
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<td>FIELD - Operations Office Staff [OSTAFF]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keys</td>
<td>TRN350</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Open an existing record.

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

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

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

Replenish the stockpile.

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

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

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

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

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

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

10. Save.

   *You’ve replenished a stockpiled material.*

   **NOTE**
   
   THE INITIAL INVOICE PAYMENT SHOULD EQUAL THE TOTAL INVOICE AMOUNT.
Closing Out Stockpile Balances

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

![Stockpiled Materials Window](image)

Figure 4. Stockpiled Materials Window
Exercise 4

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

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

Open an existing record.

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

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

Close out the balance.

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

4. Save.

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

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

You’ve closed out a stockpiled material balance.
Entering a Materials Sample Record for T2 Certifications

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

---

**Figure 5. T2 Example (Page 1 of 2)**
Basic Sample Data Panel

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

- **Sample Date** - T2 Date Sampled
- **Smpl Type** - Certification
- **Acpt Meth** - Certification
- **Material** - Material Code
- **Sampler** - jj# for the person whose signature is shown on the paper T2 in the Accepted By field

**EXAMPLE T2 MATERIAL CODE FORMAT:**

MATERIAL CODE T2.705 – T2 GUARDRAIL (NEW)

- **T2.** – BEGINS ALL MATERIAL CODES USED FOR CERTIFICATION
- **705** – REPRESENTS THE FIRST THREE DIGITS OF THE ITEM CODE
- 

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

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

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

![Contract Panel](image)

Figure 7. Maintain Sample Information Window - Contract Panel

**Other Panel**

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

![Other Panel](image)

Figure 8. Maintain Sample Information Window – Other Panel
Click the Open Assign Tests button on the toolbar to view the assigned test and click the Accept Default Tests button.

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

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

Exercise 5

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

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

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

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

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

Record the T2 date sampled.

4. In the Sample Date field, type 101214.

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

5. What is the sample ID? ________________________________
Record the appropriate sample type and acceptance method.

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

Record the material sampled.

8. In the **Material** field, type **T2**.
9. Using the right mouse button, click on the **Material** field.
10. From the object menu, select the **Filter Search** choice.
11. In the **Material Code** column, double-click **T2.705**.

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

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

Record the manufacturer.

13. In the **Mnfctr** field, right-click and select the **Search** choice. SiteManager displays the Search Window window.
14. To sort the list, click the **Producer Supplier Name** column heading.
15. In the **Producer Supplier Name** column, scroll to and double-click **Multiple\Unlisted Mnfctrs**. The system populates the **Mnfctr** field.

Record additional sample data.

16. Click the **Addtl Sample Data** tab. The system displays the Addtl Sample Data panel.
17. Select the **Buy American** check box.
18. In the **Buy American** dropdown list, select **Certified Mill Test Report**.
19. **Save**.

Select the items represented on the paper T2.

20. Click the **Contract** tab. The system displays the Contract panel.
21. On the toolbar, click the **New** button. The system displays the Select Contract/Material Information window.
22. Using the right mouse button, click in the **Contract ID** field. The system displays the Search Window window.

**NOTE**

VERIFY THAT BUY AMERICAN REQUIREMENTS HAVE BEEN MET PER SP106A.
23. From the object menu, select the **Search** choice.

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

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

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

27. Release the **Ctrl** key.

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

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

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

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

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

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

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

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

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

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

37. **Save**.

Assign the destination lab.

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

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

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

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

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

43. **Save**.
Record the T2 subcontractor.

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

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

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

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

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

49. **Save**.

Submit the T2 for auto-finalization.

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

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

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

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

Prepare for the next exercise.

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

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

    You’ve created and submitted a T2.

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

To record the actual date of a checklist scheduled event:

1. On the **Contract Records** panel, double-click the **Checklist Event Dates** icon.

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

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

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

5. **Save**.

To add a stockpiled material:

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

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

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

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

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

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

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

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

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

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

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

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

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

14. **Save**.
To replenish a stockpiled material:

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

2. Click the **Open** button.

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

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

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

6. Click **OK**.

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

8. Change the other fields as appropriate.

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

10. **Save**.

To close out the balance of a stockpiled material:

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

2. Click the **Open** button.

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

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

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

6. **Save**.
Review Exercise

In this exercise, demonstrate contract maintenance activities.

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<th>Password</th>
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<td>Keys</td>
<td>TRN350</td>
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</table>

1. Navigate to the Checklist Event Dates window.

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


4. Open the stockpiles for contract TRN350.

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

6. Replenish the stockpile using the following invoice information:

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

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

8. Exit SiteManager.

You’ve demonstrated contract maintenance activities.
Test Templates to Material Categories

This section contains a table of test templates and their associated material categories.
<table>
<thead>
<tr>
<th>Template ID</th>
<th>Template Name</th>
<th>TDOT Description</th>
<th>Material Categories</th>
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<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>
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<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>
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<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>
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<td>M018 - Glassy Particle</td>
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<td>M019 - Asphalt Core Thickness</td>
<td>Asphalt Core Thickness</td>
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<td>M021 - Slump Test of Flowable Fill</td>
<td>Flowable Fill Slump</td>
<td>204</td>
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<td>T148</td>
<td>T148 - Measuring Length of Drilled Concrete Cores</td>
<td>Concrete Core Length</td>
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<td>T164EII</td>
<td>T164EII/T308 Asphalt Content By Extraction/Furnace</td>
<td>Asphalt Content By Extraction/Furnace</td>
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<td>T166 - Bulk Spec Grav, Stbly and Flow (T166,T275,T331,T245)</td>
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<td>Concrete Cores</td>
<td>204, 501, 604, 615 and 918</td>
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<td>T255 - Total Evaporable Moisture of Aggregate by Drying</td>
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<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>
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</table>
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
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- Selecting and Recording Work Items 16
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- Additional Examples of DWR Templates 23
- Previewing a DWR 24
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Understanding Daily Work Reports

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

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

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

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

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

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

**DWR Info**

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

**Contractors**

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

**Contractors Equip**

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

**Daily Staff**

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

**Work Items**

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

**Force Accounts**

TDOT will not use this feature.
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.

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.

**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.

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

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

The Work Items panel displays the following Item information:

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

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

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

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

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

- **Current Contract Qty** - Current contract quantity of the contract line item including any change orders. Current quantity is calculated by the sum of bid quantity and the net change order quantity.

TDOT DOES NOT USE THE AS BUILT QTY FIELD.
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](image)

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](image)

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.
Exercise 8

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

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

Locate the work item.

1. Scroll to and select the following:
   
   Project Nbr 67004-3213-14, Line Item Number 1360,
   Category Number 0100, Item Code 712-06,
   Description SIGNS (CONSTRUCTION).

Record information about the work item.

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

3. Click the New button.

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

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

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

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

Complete the DWR template.

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

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

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

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

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

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

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

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

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

18. **Save**.

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

20. **Save**.

*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
Previewsing a DWR

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

Figure 15. Preview DWR Button

![Preview DWR Button]

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

Exercise 9

In this exercise, preview a DWR.

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

1. On the Services menu, click Preview DWR. The system displays the Print Preview window for the DWR.

2. To preview the DWR in a printable format, click the Next and Prior buttons and use the scroll bar to move from page to page.

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

You’ve previewed a DWR.
Exercise 10

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

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

Open an existing DWR.

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

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

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

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

5. Review the details on the DWR Info panel.

Add a remark.

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

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

8. Save.

Review some more of the information on this DWR.

9. Click the Contractors tab.

10. Was the prime contractor on-site?

11. Click the Contractor Equip. tab.

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

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

15. **Exit SiteManager.**

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

---

**Exercise 11**

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

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

**Connection**  Server

**Group Name**  FIELD - Operations Office Staff [OSTAFF]

**Keys**  Not applicable

**Scenario**  Office staff will create a DWR to record quantity for ticketed item.

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.

![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.

---

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

"GARBAGE IN = GARBAGE OUT"

**CAUTION!**

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

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

<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>Keys</td>
<td>Not Applicable</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

   **Weather conditions:**
   - High: 70 degrees
   - Low: 49 degrees
   - AM: Partially Cloudy
   - PM: Partially Cloudy

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

   **Contractor:**
   - Highways, Inc.

   **Personnel:**
   - Foreman: 1
   - Class “B” Operators: 2
   - Class “D” Operators: 1
   - Truck Driver (3/4 axles): 2

**NOTE**

SWITCH TO STANDALONE FOR THIS EXERCISE.
Equipment (on site and used):

<table>
<thead>
<tr>
<th>Item</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</td>
</tr>
<tr>
<td>Harris, Ellen</td>
<td>7.5</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
Copying a Daily Work Report

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

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

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

- Basic DWR Info
- Installed Work Items and Templates

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

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

Figure 1. Daily Work Reports Window - DWR Info Panel

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

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

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

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

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

First, open the DWR to copy.

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

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

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

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

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

7. In the Date area, in the DWR Date column, scroll to and double-click 10/17/14. The system displays the Daily Work Reports window.

Users may also use the calendar to pick a date.
Copy the contractor information from the open DWR to a new DWR for a specified date.

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

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

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

11. **Save**.

*You’ve copied a DWR.*

### Modifying a Copied Daily Work Report

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

**Contractors Panel**

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

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

**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.

![Figure 3. Daily Work Reports Window - Contractor Equip Panel](image)

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 Work Reports Window - 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)

DO NOT USE THE 'AS BUILT QTY' FIELD.
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 SITEMANAGER LOOSE LEAF FORMS STORED IN FILE MANAGEMENT (ACCESSIBLE VIA A URL LINK IN THE SYSTEM ATTACHMENTS WINDOW). ONCE THE CHANGE ORDER ITEM HAS BEEN ADDED TO THE CONTRACT, A “CATCH-UP” QUANTITY SHOULD BE PLACED ON THE ITEM AND ALL SUPPORTING SITEMANAGER LOOSE LEAF FORMS SHOULD BE ATTACHED TO THE QUANTITY.

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

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

ENTERING A REMARK SUCH AS “VIEW ATTACHMENT” WILL INDICATE TO USERS WHEN VIEWING REPORTS THAT AN ATTACHMENT EXISTS.
Exercise 6

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

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

1. On the toolbar, click the Attachments button. The system displays six more attachment-related buttons on the toolbar.

2. On the toolbar, click the New OLE button. The system displays the Insert Object window.

3. Click the Create From File tab. The system displays the Create From File panel.

Locate the file to attach.

4. Click the Browse button. The system displays the Browse window.

5. Select the file to be attached: C:\SMTRAINS\SMFILES\ITEM #705-02.02 10182014.pdf

6. Open. The system displays the path to the selected file in the File Name field.

7. Click the OK button. The system displays the OLE Attachment window.

Describe the attachment.

8. In the Name field, type 705-02.02.

9. In the Description field, type Single Guardrail (Type 2).

Provide access to the attachment.

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

11. Click the Add button. The system closes the OLE Attachment window.
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</td>
</tr>
<tr>
<td>Low</td>
<td>36</td>
</tr>
<tr>
<td>AM</td>
<td>Partially Cloudy</td>
</tr>
<tr>
<td>PM</td>
<td>Clear</td>
</tr>
</tbody>
</table>

3. Remarks:


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

<table>
<thead>
<tr>
<th>Class / Role</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class “A” Operator</td>
<td>1</td>
</tr>
<tr>
<td>Unskilled Laborer</td>
<td>4</td>
</tr>
<tr>
<td>Sweeping Machine (Vacuum) Operator</td>
<td>1</td>
</tr>
<tr>
<td>Truck Driver (3/4 axles)</td>
<td>1</td>
</tr>
</tbody>
</table>
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>

6. Equipment for prime contractor, **Highways, Inc.**
   (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 hours</td>
</tr>
<tr>
<td>Harris, Ellen</td>
<td>9 hours</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>Plan Page Nbr</th>
<th>16</th>
</tr>
</thead>
<tbody>
<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” x 60”</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?

11. **Exit SiteManager.**
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

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.

<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>
</tbody>
</table>

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.

![DWR Template Report - Parameters](image)

**Figure 3. DWR Template Report – Parameters**

![DWR Template Report (page with template information)](image)

**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.

User ID: jj00019
Password: pass
Connection: Training Server
Group Name: FIELD - District Operations Supervisor [PJSUPS]
Prior Keys: TRN354

1. In the Inspector column, select Bell, Troy.
2. In the Authorized column, select the check box.
3. In the Inspector column, select Jones, Pat.
4. In the Authorized column, select the check box.
5. Save.

You’ve authorized a DWR.
Creating Charge Days and No Charge Days

For milestones, use the Charge panel to record charge or credit information for the day and enter remarks. Review the Daily Work Reports in the diary to determine if work was performed on the contract. If work was performed, a Full Day charge can be applied. A No Charge (credit) day is a day on which no work was performed on the contract. For No Charge days, the user must enter a credit reason to explain why a credit was given. The user can also apply charge or credit information to milestones for the Contract. For No Charge days applied to a milestone, the user must also enter a credit reason.

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.

Figure 7. Unauthorized DWR Report - Parameters

Figure 8. Unauthorized DWR Report

The BOE report, *Unauthorized DWR*, is used to print a list of all DWR reports on the server that are unauthorized for the time period. This will allow unauthorized DWRs to be authorized and included in the estimate.

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.

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 \texttt{jj00004} \textit{while connected in standalone mode}.

13. On the \textbf{Main Panel}, double-click the \textbf{Daily Work Reports} icon. The system displays the Daily Work Reports panel.

14. Double-click the \textbf{Daily Work Reports} icon. The system displays the Daily Work Reports window.

15. Click the \textbf{Open} button. SiteManager displays the Contract ID window.

16. In \textbf{Contract ID} column, double-click \texttt{TRN354}.

17. In the \textbf{Inspector} area, in the Inspector Name column, double-click \textit{Bell, Troy}.

18. In the \textbf{Date} area, in the DWR Date column, double-click \texttt{05/02/14}. SiteManager displays that DWR in the Daily Work Reports window.

Select the work item to correct.

19. Click the \textbf{Work Items} tab.

20. In the \textbf{Item Code} column, scroll to and select \texttt{204-07} for Project \texttt{67004-3213-14}, Line Item Number \texttt{9500}, Category Number \texttt{0100} and Description \textit{BEDDING MATERIAL (PIPE) CLASS B}.

21. On the toolbar, click the \textbf{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 \textbf{DWR Template} button. SiteManager displays the DWR Template window.

23. In the \textbf{Template ID} column, double-click \texttt{SM10E}. The system displays the DWR Template – \texttt{SM10E} window.

24. In the \textbf{Length (ft)} field, type \texttt{50.00} (over the previously entered value of \texttt{5.00}).

25. Press the \textbf{Tab} key to calculate.

26. \textbf{Save}.

27. \textbf{Close}. The system closes the DWR Template window.

28. \textbf{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

![Equipment History Report](image)

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

![Supervisor History Report](image1)

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

Variable Labor History Report

![Variable Labor History Report](image2)

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.
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 Estimates Basics and Progress Estimates for Office Documentation

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

- Understanding Estimates in SiteManager 3
- Viewing the Unauthorized DWR Report 7
- Viewing the DWR Template Report 9
- Generating a Progress Estimate 12
- Viewing the Estimate Summary 15
- Understanding Estimate Discrepancies 17
- Resolving ‘Checklist Event Completion Date Missed Discrepancy’ Type Discrepancies 20
- Recalculating Estimate Discrepancies 22
- Resolving ‘Deficient Tested Material Discrepancy’ Type Discrepancies 24
- Identifying Materials Discrepancy Adjustments by Sample Count 30
- Regenerating the Estimate 37
- Overriding Estimate Discrepancies 39
- Entering Fuel, Bituminous Material, AC Content, and Anti-Strip Adjustments 42
- Understanding the Estimate Review and Approve Workflow 64
- Viewing Line Item Adjustments 65
- Viewing the Line Item Adjustment Report 66
- Understanding the Progress Estimate Correction Workflow 69
- Viewing the Estimate Item Detail 70
- Viewing the Estimate Item Paybook 72
- Viewing the Estimate Summary to Contractor Report 74
- Approving Estimates 77
- Tracking Estimates 80
- Viewing the Estimate History 81
- Understanding the Progress Status Window 86
- Viewing the Progress Report 88
- Correcting Quantities Previously Paid on Estimates 91
- Viewing DWRs Created by the ‘Quantity Correction’ Plug-in 96
- Summary 98
- Review Exercise 105
- Additional Reports 106
- Viewing the Samples by Status Report 108
- Viewing the Installed Work (Unpaid Installed Quantity Summary) Report 113
- Viewing the Installed Work Items Report 114
### Understanding Estimates in SiteManager

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

- Generating the estimate
- Reviewing estimate information
- Resolving estimate discrepancies
- Reviewing estimate item details
- Approving the estimate
- Tracking estimate status

---

#### Table: TDOT SiteManager Contracts (Test Reports Plugin Contracts) vs TDOT SiteManager Contracts (Automatic Material Discrepancies)

<table>
<thead>
<tr>
<th>DWR and Diaries</th>
<th>DWR and Diaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generate Estimate</td>
<td>Generate Estimate</td>
</tr>
<tr>
<td>Verify Estimate and Discrepancies</td>
<td>Verify Estimate and Discrepancies (RR069)</td>
</tr>
<tr>
<td></td>
<td>Generate Estimate again, if needed</td>
</tr>
<tr>
<td></td>
<td>Verify Estimate and remaining discrepancies</td>
</tr>
<tr>
<td>Override Discrepancies</td>
<td>Override Discrepancies</td>
</tr>
<tr>
<td>Run Test Report Program</td>
<td>--</td>
</tr>
<tr>
<td>Run Price Adjustment Program</td>
<td>Run Price Adjustment Program</td>
</tr>
</tbody>
</table>

---

**Figure 1. SiteManager Panel Window - Estimate Panel**
**TDOT Progress Estimate Generation Workflow**

*Inspection Staff*

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

<table>
<thead>
<tr>
<th>Progress Estimate Planning and Verification Tasks</th>
<th>Functional Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Inspector/Inspection checks in (Pipeline) all DWRs to the server through the ending DWR date. Refer to chapter, “Pipelining Data from Standalone to Server.”</td>
<td>Pipeline &gt; PM to Server Pipeline</td>
</tr>
<tr>
<td>The Lead Inspector/Inspector will run the BOE report, <em>DWR Template</em>, to verify installed quantities are correct and the BOE report, <em>Contract Materials Sampling Summary</em>, to ensure all sampling &amp; testing data has been entered.</td>
<td>Accessories &gt; System Attachments &gt; SM Reports (BOE reports)</td>
</tr>
<tr>
<td>If it is a maintenance contract, be sure to check for missing MMS templates on the BOE report, <em>DWR Template</em>.</td>
<td></td>
</tr>
<tr>
<td>Lead Inspector runs the BOE report, <em>Unauthorized DWR</em>, to find the applicable unauthorized DWRs.</td>
<td>Accessories &gt; System Attachments &gt; SM Reports (BOE reports)</td>
</tr>
<tr>
<td>As needed, Lead Inspector runs and reviews the BOE report, <em>DWR Template</em>, to help determine which unauthorized DWRs to authorize for the estimate. Lead inspector may also need to review the DWRs and other reports to help with this determination.</td>
<td>Accessories &gt; System Attachments &gt; SM Reports (BOE reports)</td>
</tr>
<tr>
<td>As needed, Lead Inspector creates any missing diaries for the estimate period and authorizes all applicable DWRs to date not previously authorized. A diary is to be created for each day of the period covered by the estimate for the life of the contract.</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 1. TDOT Progress Estimate Generation Workflow – Inspection Staff
**Office Staff**

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

<table>
<thead>
<tr>
<th>Progress Estimate Planning and Verification Tasks</th>
<th>Functional Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create DWRs for office recorded work items such as mobilization and ticketed items.</td>
<td>Daily Work Reports &gt; Daily Work Reports</td>
</tr>
<tr>
<td>Use the Diary window to authorize DWRs created by Office Staff.</td>
<td>Daily Work Reports &gt; Diary</td>
</tr>
<tr>
<td>Run the BOE report, <em>Unauthorized DWR</em>, to find the applicable unauthorized DWRs.</td>
<td>Accessories &gt; System Attachments &gt; SM Reports (BOE reports)</td>
</tr>
<tr>
<td>As needed, run and review the BOE report, <em>DWR Template</em>, to help determine which unauthorized DWRs to authorize.</td>
<td>Accessories &gt; System Attachments &gt; SM Reports (BOE reports)</td>
</tr>
<tr>
<td>Create any missing diaries for the estimate period and authorize all applicable Office Staff created DWRs to date.</td>
<td>Daily Work Report &gt; Daily Work Reports or Diary</td>
</tr>
</tbody>
</table>

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

**District Supervisor**

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

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

Table 3. TDOT Progress Estimate Generation Workflow – District Supervisor
Office Staff

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

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

Table 4. TDOT Progress Estimate Generation Workflow – Office Staff
**TDOT Estimate Generation Schedule**

All progress estimates are generated by the Office Staff. The following table outlines the Estimate Generation schedule for each of the Regions.

<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>21\textsuperscript{st} day of the previous month</td>
<td>Through 20\textsuperscript{th} day of the current month</td>
<td>21\textsuperscript{st} day of the current month</td>
</tr>
<tr>
<td>Region 2</td>
<td>1\textsuperscript{st} day of the previous month</td>
<td>Through the last day of the previous month</td>
<td>1\textsuperscript{st} day of the current month</td>
</tr>
<tr>
<td>Region 3</td>
<td>1\textsuperscript{st} day of the previous month</td>
<td>Through the last day of the previous month</td>
<td>1\textsuperscript{st} day of the current month</td>
</tr>
<tr>
<td>Region 4</td>
<td>16\textsuperscript{th} day of the previous month</td>
<td>Through the 15\textsuperscript{th} day of the current month</td>
<td>16\textsuperscript{th} day of the current month</td>
</tr>
</tbody>
</table>

Table 5. TDOT Progress Estimate Generation Schedule

**Viewing the Unauthorized DWR Report**

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

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

![BOE Report - Unauthorized DWR - Parameters](image)

Figure 2. BOE Report - Unauthorized DWR - Parameters
<table>
<thead>
<tr>
<th>DWR Date</th>
<th>Inspector</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/20/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>03/29/2015</td>
<td>Smith, Joe</td>
<td></td>
</tr>
<tr>
<td>03/30/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>03/31/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>04/01/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>04/02/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>04/03/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>04/04/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>04/05/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>04/06/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>04/07/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>04/08/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
<tr>
<td>04/09/2015</td>
<td>Smith, Joe</td>
<td></td>
</tr>
<tr>
<td>04/10/2015</td>
<td>Smith, Terry</td>
<td></td>
</tr>
</tbody>
</table>

Figure 3. BOE Report - Unauthorized DWR
Viewing the DWR Template Report

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

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

![BOE Report - DWR Template - Prompts](image)

Figure 4. BOE Report - DWR Template - Prompts
Figure 5. BOE Report - DWR Template

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

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

IN THE “AUTH” COLUMN, “Y” INDICATES THE QUANTITY IS AUTHORIZED FOR PAYMENT AND “N” INDICATES THE QUANTITY IS NOT AUTHORIZED.
Exercise 1

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

**Note:** For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to answer the questions.

1. *In Figure 5, for item 705-04.07, what is the total quantity reported to date?* _______________________________________

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

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

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

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

You’ve run the BOE report, *DWR Template*.
Generating a Progress Estimate

Access the Generate Estimate window from the Contractor Payments panel.

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

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

Figure 6. Generate Estimate Button

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

Figure 7. Generate Estimate Window

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

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

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

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

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

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

- **Identify discrepancies.** The system checks for and reports 'discrepancies' for the work being performed by defined rules and conditions, for example, overruns, checklist events and materials samples. This activity populates a window with discrepancy details for the District Supervisor so that proactive steps can be taken for various project issues. The edits performed during the progress estimate are a subset of the edits performed during the final estimate.

- **Determine Funding Amounts.** The system calculates the funding amount for the different funding sources based upon the funding given for the contract, project, category or item.

Types of Estimates

- Progress (first and all intermediate)

- Final

- Supplemental (Used only when final estimate has been fully approved and paid. Verify in the Estimate Tracking window.)
Exercise 2

In this exercise, generate a progress estimate.

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

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

Open the Generate Estimate window.

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

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

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

Identify the contract to use.

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

Specify the date range and generate the estimate.

6. In the End field, type 093014.

7. On the keyboard, press the Tab key.

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

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

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

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

11. In the message about the completion, click OK.
Prepare for the next exercise.

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

*You’ve generated a progress estimate.*

**Viewing the Estimate Summary**

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

- **Previous Estimate(s) ($)** - Combined totals for previous estimate(s)
- **This Estimate ($)** – totals for the current estimate
- **Total to Date ($)** – combined totals for all estimates

![Estimate Summary Window](image)

*Figure 8. Estimate Summary Window*
Exercise 3

In this exercise, view the Estimate Summary window.

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

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

Change contracts.

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

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

Select the estimate.

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

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

6. Are there adjustments on this estimate? ________________

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

You’ve viewed the Estimate Summary window.
Understanding Estimate Discrepancies

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

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

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

Estimate discrepancies are listed at the top of the Estimate Discrepancies window, and the item discrepancies are listed after them. The Status field value is either ‘Unresolved’ or ‘Override.’ When the Recalculate Discrepancies function is selected from the Services menu, or if the Estimate is regenerated, the discrepancies are re-determined.
Exercise 4

In this exercise, view the discrepancies for an estimate.

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

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

2. How many unresolved discrepancies exist? _______________

You’ve viewed the Estimate Discrepancies window.

Viewing the Estimate Discrepancy Report

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

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

Figure 12. BOE Report - Estimate Discrepancy [CR01] - Prompts
Resolving ‘Checklist Event Completion Date Missed Discrepancy’ Type Discrepancies

Figure 14. Checklist Event Dates Window
Exercise 5

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

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

1. On the Estimate Discrepancies window, in the Description column, select Event Prompt Payment to Subcontractors for date (09/01/2014) has not occurred.

Now, jump to the part of the system where the unresolved discrepancy occurred.

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

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

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

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

6. Save.

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

You’ve resolved an estimate discrepancy for a missed checklist event.
Recalculating Estimate Discrepancies

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

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

THE OFFICE STAFF WILL RECALCULATE DISCREPANCIES AFTER COMPLETING ALL POSSIBLE ESTIMATE DISCREPANCY RESOLUTIONS. THIS WILL NEED TO BE DONE PRIOR TO RESOLVING DEFICIENT MATERIAL DISCREPANCIES AND OVERRIDING ESTIMATE DISCREPANCIES.
Exercise 6

In this exercise, recalculate estimate discrepancies.

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

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

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

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

4. **Save**.

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

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

*You’ve recalculated estimate discrepancies.*
Resolving ‘Deficient Tested Material Discrepancy’
Type Discrepancies

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

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

- Not enough tests were performed and the message (and deduction) is valid.
- A test(s) entered has failing results and the message (and deduction) is valid.
- All required tests were performed but some still need to be entered into SiteManager.
- All required tests were performed and entered but the sample record is not fully approved.
- A test(s) has failing results due to a data entry error which needs to be corrected.

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

- Not enough T2’s were received and the message (and deduction) is valid.
- Not all T2’s have been entered into SiteManager yet or the sample record is not complete.
- A Representative Qty was not entered on the Contracts panel of the sample record. *(This field is only used for T2 Certifications!)*
- A data entry error occurred on the sample record which needs to be corrected.
The Estimate Discrepancies window displays discrepancies by Line Item Number. The Line Item Adjustments window can be used to identify the item number(s) and to see the quantity and amount being withheld.

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

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

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

b. Determine the accuracy of the discrepancy and what corrective action is needed.
Viewing the Contract Materials Sampling Summary Report for T2 Items

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

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

![Figure 17. BOE Report - Contract Materials Sampling Summary [RR069] – Prompts](https://example.com/figure17.png)
Figure 18. BOE Report - Contract Materials Sampling Summary [RR069]
Unauthorized a Sample Record to Modify a Sample Record

**Exercise 7**

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

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

Locate the desired sample record.

1. Click the **Main Panel** tab. The system displays the Main Panel panel.
2. Double-click the **Materials Management** icon. The system displays the Materials Management panel.
3. Double-click the **Sampling and Testing** icon. The system displays the Sampling and Testing panel.
4. Double-click the **Sample Information** icon. The system displays the Maintain Sample Information window.

Locate the desired sample record.

5. On the toolbar, click the **Open** button. The system displays the Select Sample window.
6. In the **Sample** area, click the **Sample ID** column header.
7. In the **Find** field, type 85810.
8. In the **Sample ID** column, double-click jj000291637085810. The system displays the Maintain Sample Information window.

Unauthorized the sample record.

9. From the **Services** menu, select **Unauthorized**. The system displays a message to confirm the decision to unauthorize the sample record.
10. In the message, click **Yes**. The system changes the Status from Completed to Pending Authorization.

11. **Save**.

Correct the represented quantity.

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

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

14. **Save**.

Locate the sample record in the Review Samples window.

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

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

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

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

Authorize the sample record again.

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

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

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

22. **Save**.

Prepare for the next exercise.

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

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

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

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

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

*You’ve unauthorized an electronic T2 record, made corrections and reauthorized.*
Identifying Materials Discrepancy Adjustments by Sample Count

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

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

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

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

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

*In this example, the T255 test is the least satisfied requirement, which results in a material discrepancy adjustment of **-100 Tons**.*
Examples of BOE report pages for *Contract Materials Sampling Summary* [RR069] with detail about line item number 0630 (item code 303-01) follows:

![BOE Report - Contract Materials Sampling Summary](image1)

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

![BOE Report - Contract Materials Sampling Summary](image2)

**Figure 20. BOE Report - Contract Materials Sampling Summary [RR069] – LIN 0630**
Exercise 8

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

Note: For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to answer the questions.

1. In Figure 19, what is the value in the T255 test’s Test Balance field? ______
2. In Figure 19, what is the value in the T27 test’s Test Balance field? ______
3. In Figure 20, what is the value in the T310 test’s Test Balance field? ______
4. Which test is least satisfied? ______

You’ve learned how to determine which requirement on an item is the least satisfied and will determine the amount paid.
Unauthorizing a Sample Record to Requeue a Test

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

Exercise 9

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

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

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

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

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

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

![Find Sample Parameters Window](image)

Figure 21. Find Sample Parameters Window

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

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

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

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

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

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

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

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

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

![Find Samples for Contract TRN356b Window](image)

Figure 22. Find Samples for Contract < > Window (when scrolled left)
14. Use the horizontal scrollbar to scroll to the right.

![Find Samples for Contract < > Window (when scrolled right)](image)

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

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

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

View the sample record.

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

Unauthorize the sample record.

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

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

21. **Save**.

Send the test back to the lab.

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

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

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

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

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

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

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

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


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

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

33. Click **Apply**. The system displays the jj00281637084442 sample record’s T310 test.

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

Add a remark.

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

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

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

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

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

Prepare for the next exercise.

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

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

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

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

*You’ve unauthorized and requeued the test on the sample.*
Regenerating the Estimate

Figure 24. Generate Estimate (when estimate already exists)

Exercise 10

In this exercise, generate a progress estimate.

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

1. Click the Main Panel tab. The system displays the Main Panel panel.
Open the Generate Estimate window.

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

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

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

Identify the contract to use.

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

Specify the date range and generate the estimate.

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

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

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

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

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

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

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

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

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

   *You’ve regenerated a progress estimate.*
Overriding Estimate Discrepancies

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

TDOT Estimate Discrepancy Procedures

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

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

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

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

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

Figure 25. Estimate Discrepancies Window
Exercise 11

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

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

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

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

Override a discrepancy.

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

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

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

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

7. Save.
Override another discrepancy.

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

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

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

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

12. **Save**.

Prepare for the next exercise.

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

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

*You’ve overridden a discrepancy.*
**Entering Fuel, Bituminous Material, AC Content, and Anti-Strip Adjustments**

A TDOT-developed plug-in accessible from the Contract window’s Attachment functionality, is used to calculate and apply fuel, bituminous material, AC content and anti-strip adjustments.


The Adjustments plug-in will reference the estimate details to create the appropriate payment price adjustments for the current estimate period. The adjustments will be recorded as a line item adjustment and associated with one of the adjustment items listed in the following table.

If the item is removed, via the Line Item Adjustment window (by the ‘insufficient sample discrepancy’ option), then it is not adjusted.

**IMPORTANT:** The user must first generate and resolve all discrepancies for a pending estimate through standard SiteManager functionality before accessing the Adjustments plug-in.

![Figure 26. Attachments Window](image)

**ONLY USERS ASSIGNED TO THE OFFICE STAFF USER GROUP ARE ABLE TO UPDATE THE ADJUSTMENTS PLUG-IN.**

**PRICE ADJUSTMENTS ARE ONLY ASSESSED WHEN THE MONTHLY INDEX VARIES BY 5% OR MORE FROM THE BIDDING INDEX.**
Table 6. TDOT Price Adjustment Pay Item List

The steps to use the Adjustments plug-in are as follows and are detailed on the following pages.

1. Generate and review the estimate.

2. Resolve or override discrepancies.

3. Access the Adjustments plug in (Main Panel > Contract Administration > Contracts > select Contract > click Attachments button > double-click Adjustments


5. When applicable, enter monthly Anti-Strip Invoice Price, Mix Design and Recycled Asphalt percentages and dates for the pay items included in the estimate and listed on the Adjustment Setup panel of the Adjustments plug-in.

6. Confirm all messages have been satisfied for the estimate adjustments on the Adj. Process Submission panel of the Adjustments plug-in.

7. Click the Calc. button on the Adj. Process Submission panel of the Adjustments plug-in to generate adjustments to the estimate and provide 1st level approval of the estimate.


<table>
<thead>
<tr>
<th>Item Code</th>
<th>Spec Year</th>
<th>Unit</th>
<th>Price Adjustment Pay Item Description</th>
<th>Unit Of Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>109-01.01</td>
<td>2000</td>
<td>Eng</td>
<td>PAY ADJUSTMENT FOR FUEL</td>
<td>Dollar</td>
</tr>
<tr>
<td>109-01.02</td>
<td>2000</td>
<td>Eng</td>
<td>PAYMENT ADJUSTMENT FOR BITUMINOUS MATERIAL.</td>
<td>Dollar</td>
</tr>
<tr>
<td>307-03.20</td>
<td>2000</td>
<td>Eng</td>
<td>PRICE ADJUSTMENT FOR AC CONTENT</td>
<td>Dollar</td>
</tr>
<tr>
<td>307-05.40</td>
<td>2000</td>
<td>Eng</td>
<td>PAYMENT ADJUSTMENT FOR LIQUID ANTI-STRIP</td>
<td>Dollar</td>
</tr>
<tr>
<td>411-03.20</td>
<td>2000</td>
<td>Eng</td>
<td>PRICE ADJUSTMENT FOR ASPHALT CEMENT CONTENT</td>
<td>Dollar</td>
</tr>
<tr>
<td>411-05.40</td>
<td>2000</td>
<td>Eng</td>
<td>PAYMENT ADJUSTMENT FOR LIQUID ANTI-STRIP</td>
<td>Dollar</td>
</tr>
</tbody>
</table>
Adjustments Plug-in’s Adj Process Submission Panel

To initiate the adjustment process by selecting the Calculation option or to delete a pending estimate adjustment, use the Adj. Process Submission panel.

In the Estimate Nbr dropdown list, select the estimate to for which to use the Adjustments plug-in. The window displays the selected estimate period begin and end dates as well as the status of the selected estimate. The bottom panel displays pertinent processing messages for the adjustments process associated with the selected estimate.

Information about the process messages follows:

- If a pending estimate exists for the contract, the first message is always the pending estimate number.
- If the selected estimate is an approved estimate then a message stating that the Adjustment cannot be made for this estimate will display.
- If the selected estimate has 307/411 items placed during an estimate period in which an appropriate Mix Design (DA) percentage has not been entered, then a message stating what is needed and that Adjustments cannot be made will display.
- If the selected estimate has Fuel, Bituminous, or 307/411 items placed during the estimate period without the appropriate price indices then a message appears. (Entered by HQ Construction).
- If adjustments are not associated with the contract then contact HQ Finance.
- If MMS Template data is required and has not been entered then a message stating the Adjustments cannot be made for this estimate will display. (Maintenance Contracts Only).
Exercise 12

In this exercise, access the Adjustments plug-in’s Adj. Process Submission panel.

<table>
<thead>
<tr>
<th>User ID</th>
<th>jj00029</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 – Office Staff [OSTAFF]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior Keys</td>
<td>TRN356c; 0002 (estimate)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

2. Double-click the **Contract Records** icon. The system displays the Contract Records panel.

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

4. On the toolbar, click the **Open** button. The system displays the Select Contract window.

5. In the **Contract ID** column, scroll to and double-click TRN356e.

6. On the toolbar, click the **Attachments** button. The system displays the Attachments window.
7. Double-click the **Adjustments** attachment. The system displays the TDOT Price Payment Adjustment window.

![Adjustments Plug-in - Adj. Process Submission Panel](image)

**Figure 27. Adjustments Plug-in - Adj. Process Submission Panel**

8. In the **Adjustment Calculation Messages** area, notice the remaining issues to address. All valid discrepancies must be resolved before making adjustments.

9. What is the 307.01-01 item missing that is preventing adjustments from being made? ________________________

10. Click the **Fuel Adjustment Items** tab. 
    Note: Fuel adjustments were made on this estimate.

11. Click the **Bitm Adjustment Items** tab. 
    Note: No bituminous adjustments were made on this estimate yet.

12. Click the **307 A/C Adjustment Items** tab. 
    Note: 307 A/C adjustments were made on this estimate.

13. Click the **411 A/C Adjustment Items** tab. 
    Note: 411 A/C adjustments were made on this estimate.

14. Click the **Liquid Anti-strip** tab. 
    Note: No liquid anti-strip adjustments were made on this estimate yet.

You’ve accessed the Adjustments plug-in’s Adj. Process Submission panel and verified that no adjustments were made yet.
Adjustments Plug-in’s Adjustment Setup Panel

The Adjustments Setup panel provides maintenance capabilities for item specific and contract level Mix Design (DA) and Recycled Asphalt (RA) Content performance grade asphalt invoice prices as well as liquid anti-strip prices.

The plug-in automatically creates one DA/RA row for each applicable contract item that has a DWR work item recorded against that item.

When the user accesses this panel, only the latest DA/RA values and PG Invoice dates are displayed.

To update any values, select the row, select the Open option, and then select new. The system keeps a history of values entered in the Adjustment Setup panel. To access the history (all previously entered AC values), select the row, and then select open.

Exercise 13

In this exercise, to complete the adjustments for the contract, enter the required information noted on the Adj Process Submission panel.

Note: For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to see the results of each step.

1. Click the Adjustment Setup tab. The system displays the Adjustment Setup panel.

2. On the Adjustment Setup panel, in the Mix Design Asphalt Percentages area, select the following row:

   Project 67004-3213-14, Item Cd 307.01-01.
3. **On the toolbar, click Open.** The Adjustments plug-in displays the Mix Design Percentage Setup window.

![Figure 29. Adjustments Plug-in – Mix Design Percentage Setup Window](image)

4. **Click New.** The system displays fields for input.

5. **In the Mix Design (DA) Pct field,** type 3.5.


7. **In the Date field,** type 090114.

![Figure 30. Adjustments Plug-in – Mix Design Percentage Setup Window (after clicking New button and recording values)](image)
8. **Save.** The system closes the input fields and adds a new row with the information you entered into the lower area of the window.

![Figure 31. Adjustments Plug-in – Mix Design Percentage Setup Window (after clicking Save button)](image)

9. **To close the Mix Design Percentage Setup window, click the Close button.** The system displays the Adjustment Setup panel.

![Figure 32. Adjustments Plug-in - Adjustment Setup Panel](image)
10. Click the **Adj Process Submission** tab. The system displays the **Adj Process Submission** panel.

11. Has the error been resolved? _______

12. Which item is still missing the mix design asphalt percent? _______

13. Click the **Adjustment Setup** tab. The system displays the **Adjustment Setup** panel. The system displays the recent percentages entered for the 307-01.01 item.

   *Enter another mix design asphalt percentage.*

14. Select the following row:

   **Project 67004-3213-14, Item Cd 307.01-08.**

15. On the toolbar, click **Open**. The system displays the Mix Design Percentage Setup window.

16. Click **New**.

17. In the **Mix Design (DA) Pct** field, type **4.3**.

18. In the **Recycled (RA) Pct** field, type **1.16**.

19. In the **Date** field, type **090114**.
20. **Save.** The system adds a new row with the information you entered into the lower area of the window.

![Figure 34. Adjustments Plug-in – Mix Design Percentage Setup Window (after clicking New button and recording values)](image)

21. **To close the Mix Design Percentage Setup window, click the Close button.** The system displays the Adjustment Setup panel.

![Figure 35. Adjustments Plug-in - Adjustment Setup Panel](image)

You’ve entered information for two adjustments.

> **ONCE AN ESTIMATE IS PAID IT LOCKS THE MIX DESIGN PERCENTAGES SO THAT THEY CANNOT BE CHANGED FOR THAT ESTIMATE PERIOD. TO CORRECT MIX DESIGN PERCENTAGE ERRORS, CORRECTIONS MUST BE MANUALLY CALCULATED.**
Adjustments Plug-in’s Adj Process Submission Panel

The Adj Process Submission panel is used to initiate the adjustment process by clicking the Calc button on the toolbar after resolving all processing messages displayed in the window. After calculating adjustment, the following message displays:

INITIAL APPROVAL IS GIVEN FOR THE ESTIMATE; RETURNING ESTIMATE APPROVAL BACK TO PENDING ALSO DELETES ESTIMATE’S PRICE AND PAY ADJUSTMENTS IF THEY EXIST.

Exercise 14

In the following exercise, to complete the adjustments for a contract, enter the required information noted on the Adj Process Submission panel.

Note: For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to see the results of each step and to answer the questions.

First, let’s verify that we’ve satisfied all of the required Adjustment Calculation Messages.

1. Click the Adj Process Submission tab. The system displays the Adj Process Submission panel.

![Screen capture of Adj Process Submission panel](image)

Figure 36. Adjustments Plug-in - Adjustment Process Submission Panel

2. Have you addressed all required messages? ____________
Calculate the adjustments to the estimate.

3. On the toolbar, click the **Calc** button. The system displays a message prompting for a confirmation.

![Figure 37. Adjustments Plug-in – Calculate Price Adjustments Prompt](image)

4. In the message, click **Yes**. The system creates a line item adjustment for the estimate on the contract and grants first level approval to the estimate.

![Figure 38. Adjustments Plug-in - Adjustment Process Submission Panel (After Clicking Calc Button)](image)

Confirm the adjustments were applied to the estimate.

5. **Is there an Adjustment calculation message to indicate initial approval was given?**

You’ve completed the adjustments for the contract.
**Adjustments Plug-in’s Fuel Adjustment Items Panel**

The Fuel Adjustment Items panel is a three focus window.

- The top panel is populated automatically by the plug-in and displays the adjustment item details, the Bidding Fuel Price field to display the contract level price of fuel for bidding, and the Bidding Index field to display the value for the entry immediately preceding the Contract’s Price Adjustments Base Date.

- The middle panel is also automatically populated by the plug-in and displays the item details for the specified line item for the selected adjustment type for each project/category the item is associated with on the contract. The total adjustment amount for the project/category displays in the Dollar Amt/Placed Quantity field.

- The bottom panel is also automatically populated by the plug-in and displays the pay adjustments for fuel created for those items designated as fuel adjustment items on the Price Adjustment Maintenance Reference Table in SiteManager and installed during the estimate period. These adjustments will be recorded as a Line Item Adjustment.

THE INDEX PERCENT CHANGE MUST BE 5% OR MORE BEFORE ADJUSTMENTS ARE MADE.
Exercise 15

In this exercise, view the fuel adjustment items.

Note: For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to see the results of each step and to answer the questions.

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

   ![Figure 39. Adjustments Plug-in - Fuel Adjustment Items Panel](image)

2. **Were there any fuel adjustments made during this estimate period?** ______

   You’ve viewed the fuel adjustment items.
Adjustments Plug-in’s Bitm Adjustment Items Panel

The Bitm Adjustment Items panel is a three focus window.

- The top panel is populated automatically by the plug-in and displays the adjustment item details and the Base Index field to display the value for the entry immediately preceding the Contracts Price Adjustment Base Date.

- The middle panel is also automatically populated by the plug-in and displays the item details for the specified line item for the selected adjustment type for each project/category the item is associated with on the contract. The total adjustment amount for the project/category displays in the Dollar Amt/Placed Quantity field.

- The bottom panel is also automatically populated by the plug-in and displays the pay adjustments for bituminous materials created for those items designated as bituminous adjustment items on the Price Adjustment Maintenance Reference Table in SiteManager and installed during the estimate period. These adjustments will be recorded as a Line Item Adjustment.

IF AN APPLICABLE ITEM RESULTED IN A ZERO PAYMENT ADJUSTMENT AMOUNT BECAUSE THE MIX DESIGN WAS NOT ENTERED, ASTERISKS WILL BE PLACED IN THE APPLICABLE FIELD AND A MESSAGE WILL BE LISTED AT THE BOTTOM STATING WHY.

THE INDEX PERCENT CHANGE MUST BE 5% OR MORE BEFORE ADJUSTMENTS ARE MADE.
Exercise 16

In this exercise, view the bituminous adjustment items for a contract.

**Note:** For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to see the results of each step.

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

   ![Figure 40. Adjustments Plug-in - Bitm Adjustment Items Panel](image)

2. *Were there any bituminous adjustments made during this estimate period? _____________________________

   You've viewed the bituminous adjustment items.
**Adjustments Plug-in’s 307 A/C Adjustment Items Panel**

The 307 A/C Adjustment Items panel has three panes:

- The top pane is populated automatically by the plug-in and displays the adjustment item details.

- The middle pane is also automatically populated by the plug-in and displays the item details for the specified line item for the selected adjustment type for each project/category the item is associated with on the contract. The total adjustment amount for the project/category displays in the Dollar Amt/Placed Quantity field.

- The bottom pane is also automatically populated by the plug-in and displays the pay adjustments for A/C Content for those items designated as 307 Mix items on the Price Adjustment Maintenance Reference Table in SiteManager and installed during the estimate period. These adjustments will be recorded as a Line Item Adjustment.

IF AN APPLICABLE ITEM RESULTED IN A ZERO PAYMENT ADJUSTMENT AMOUNT BECAUSE THE MIX DESIGN WAS NOT ENTERED, ASTERISKS WILL BE PLACED IN THE APPLICABLE FIELD AND A MESSAGE WILL BE LISTED AT THE BOTTOM STATING WHY.
Exercise 17

In this exercise, view the 307 asphalt content adjustment items for a contract.

Note: For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to see the results of each step and to answer the questions.

1. Click the **307 A/C Adjustment Items** tab. The system displays the 307 A/C Adjustment Items panel.

![Figure 41. Adjustments Plug-in - 307 A/C Adjustment Items Panel](image)

2. Were there any 307 A/C adjustments made during this estimate period? _________________________________________

You’ve viewed the 307 asphalt content adjustment items.
Adjustments Plug-in’s 411 A/C Adjustment Items Panel

The 411 A/C Adjustment Items panel has three panes.

- The top pane is populated automatically by the plug-in and displays the adjustment item details.

- The middle pane is also automatically populated by the plug-in and displays the item details for the specified line item for the selected adjustment type for each project/category the item is associated with on the contract. The total adjustment amount for the project/category displays in the Dollar Amt/Placed Quantity field.

- The bottom pane is also automatically populated by the plug-in and displays the pay adjustments for A/C Content created for those items designated as 411 Mix adjustment items on the Price Adjustment Maintenance Reference Table in SiteManager and installed during the estimate period. These adjustments will be recorded as a Line Item Adjustment.

IF AN APPLICABLE ITEM RESULTED IN A ZERO PAYMENT ADJUSTMENT AMOUNT BECAUSE THE MIX DESIGN WAS NOT ENTERED, ASTERISKS WILL BE PLACED IN THE APPLICABLE FIELD AND A MESSAGE WILL BE LISTED AT THE BOTTOM STATING WHY.
Exercise 18

In this exercise, view the 411 asphalt content adjustment items.

Note: For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to see the results of each step and to answer the questions.

1. Click the 411 A/C Adjustment Items tab. The system displays the 411 A/C Adjustment Items panel.

![Image of 411 A/C Adjustment Items panel]

Figure 42. Adjustments Plug-in - 411 A/C Adjustment Items Panel

2. Were there any 411 A/C adjustments made during this estimate period? __________________________________________

You’ve viewed the 411 asphalt content adjustment items.
Adjunctments Plug-in’s Liquid Anti-Strip Panel

The Anti-Strip Adjustment Item panel has three panes:

- The top pane is populated automatically by the plug-in and displays the adjustment item details.

- The middle pane is also automatically populated by the plug-in and displays the item details for the specified line item for the selected adjustment type for each project/category the item is associated with on the contract. The total adjustment amount for the project/category displays in the Dollar Amt/Placed Qty field.

- The bottom pane is also automatically populated by the plug-in and displays the pay adjustments for anti-strip created for those items where anti-strip quantities were entered in the Total Anti-Strip Gallons/Liters field within the SM39 DWR template.

IF AN APPLICABLE ITEM RESULTED IN A ZERO PAYMENT ADJUSTMENT AMOUNT BECAUSE THE INVOICE PRICE WAS NOT ENTERED, ASTERISKS WILL BE PLACED IN THE APPLICABLE FIELD AND A MESSAGE WILL BE LISTED AT THE BOTTOM STATING WHY.
In this exercise, view the liquid anti-strip adjustment items.

**Note:** For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to see the results of each step.

1. *To prepare for the next exercise, click the Liquid Anti-strip tab. The system displays the Liquid Anti-strip panel.*

   ![Liquid Anti-strip Panel](image)

   **Figure 43. Adjustments Plug-in – Liquid Anti-strip Panel**

2. *Were there any liquid anti-strip adjustments made during this estimate period? ____________________________*

3. *To exit the plug-in, click Exit. The system closes the plug-in and displays the Contracts window.*

Prepare for the next exercise.

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

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

*You’ve viewed the liquid anti-strip adjustment items.*
# Understanding the Estimate Review and Approve Workflow

The Office Staff will complete the following tasks as part of the estimate generation and review process.

<table>
<thead>
<tr>
<th>Estimate Review and Approve Workflow Tasks</th>
<th>Functional Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using the Adjustment Plug-In, Office Staff will approve the completed estimate which places it in the first level of approval and contact the District Supervisor when the estimate is ready for the next approval level. Note: Do not approve estimate if estimate is Less than $1000, contact HQ Finance.</td>
<td>Contractor Administration &gt; Contract Records &gt; Contracts &gt; Attachments &gt; Adjustment (plug-in)</td>
</tr>
<tr>
<td>District Supervisor will review the BOE report, <em>Estimate Summary to Contractor</em> (RR004) and the Estimate Discrepancy window to verify the estimate is correct. As needed, the District Supervisor will run any reports or view any other windows necessary to review item quantities.</td>
<td>Accessories &gt; System Attachments &gt; SM Reports (BOE reports) and Contractor Payments &gt; Estimate Discrepancy, Various Contract Adjustments, Daily Work Reports, Contractor Payments, and BOE Reports</td>
</tr>
<tr>
<td>District Supervisor will approve or stop the estimate based on their review. To stop the estimate, the District Supervisor must notify the Office Staff person who generated the estimate. When stopped, an estimate will need to be evaluated and may need to be generated again. If changes are required, the Office Staff will follow the estimate correction procedures detailed in Table 8, ‘TDOT Progress Estimate Correction Workflow’ of this chapter.</td>
<td>Contractor Payments &gt; Estimate &gt; Estimate Approval</td>
</tr>
<tr>
<td>Office Staff / District Supervisor may track the status of the estimate.</td>
<td>Contractor Payments &gt; Estimate &gt; Estimate Tracking</td>
</tr>
<tr>
<td>Finance will approve or stop the estimate based on their review. To stop the estimate, Finance must notify the Office Staff person who generated the estimate. When stopped, an estimate will need to be evaluated and may need to be generated again.</td>
<td>Contractor Payments &gt; Estimate &gt; Estimate Approval</td>
</tr>
</tbody>
</table>

Table 7. Estimate Review and Approval Workflow
Viewing Line Item Adjustments

The Contract Line Item Adjustments window displays line item adjustments that are reflected in the final payable amount for the estimate. The top pane displays all the line items for which an adjustment is present. The bottom pane displays associated adjustment information. System-generated adjustments cannot be modified by a user.

![Line Item Adjustments Window](image)

---

**NOTE:** A BOE report, Line Item Adjustment, is also available.
Viewing the Line Item Adjustment Report

The BOE report, *Line Item Adjustment*, lists all of the changes made to the original system calculated estimate per TDOT policies.

**Navigation:** Accessories > System Attachments > SM Reports (BOE reports)
In this exercise, view the line item adjustments.

User ID      jj000029  Password  pass
Connection   Training Server
Group Name   FIELD – Office Staff [OSTAFF]
Prior Keys   TRN356e

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

2. Double-click the **Contract Adjustments** icon. The system displays the Contract Adjustments panel.

3. Double-click the **Line Item Adjustments** icon. The system displays the Select Contract and Estimate window.
4. In the **Contract** area, in the **Contract ID** column, double-click **TRN356e**.

5. In the **Estimate** area, in the **Estimate Number** column, double-click **0002**. The system displays the Line Item Adjustments window.

View an adjustment.

6. Scroll to and select the following row:

   Prj Nbr **67004-3213-14**, Catg Nbr **0100**,  
   Line Item Number **0670**, Item Code **307-01.01**,  
   Description **ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A**.

   7. What is the amount of the adjustment for this item? __________

View another adjustment.

8. Scroll to and select the following row:

   Prj Nbr **67004-3213-14**, Catg Nbr **0100**,  
   Line Item Number **9009**, Item Code **411-03.20**,  
   Description **PRICE ADJUSTMENT FOR ASPHALT CEMENT CONTENT**.

   9. What is the amount of the adjustment for this item? __________

Prepare for the next exercise.

10. **Close**. The system closes the Line Item Adjustments window and displays the Contract Adjustments panel.

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

   *You’ve viewed the line item adjustments.*
Understanding the Progress Estimate Correction Workflow

If a discrepancy is displaying due to an error recorded on a DWR, the Office staff will not override the discrepancy. Instead, the Office Staff and Inspection Staff will complete the following tasks as part of the estimate correction process to update the DWR error prior to running the plug-ins to adjust the estimate:

<table>
<thead>
<tr>
<th>Progress Estimate 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 unauthorize by the Office Staff; DWRs created by Inspection Staff should be unauthorize 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 8. TDOT Progress Estimate Correction Workflow

EVERY EFFORT SHOULD BE MADE TO CORRECT THE ESTIMATE PRIOR TO RUNNING THE ADJUSTMENT PLUG-INS FOLLOWING THE WORKFLOW ABOVE. ONLY AFTER BEING SATISFIED THAT THE ITEM QUANTITIES ARE CORRECT SHOULD THE OFFICE STAFF RUN THE ADJUSTMENT PLUG-INS TO ADJUST THE PAY AMOUNT OF THE ESTIMATE.

IT IS CRITICAL THAT THE APPROPRIATE WORKFLOW IS FOLLOWED SO THAT THE PLUG-INS WILL CALCULATE ADJUSTMENTS PROPERLY.

ALWAYS GENERATE THE PENDING ESTIMATE AND ADDRESS ALL ISSUES AND DISCREPANCIES PRIOR TO CALCULATING PRICE ADJUSTMENTS WITH THE ADJUSTMENTS PLUG-IN.

REMEMBER THE ADJUSTMENTS PLUGIN WILL INDICATE YOU APPROVE OF THE ESTIMATE. IF AN ESTIMATE MUST BE DELETED AND GENERATED AGAIN, ALWAYS USE THE ADJUSTMENTS PLUG-IN TO PUT THE ESTIMATE BACK IN PENDING STATUS.
Viewing the Estimate Item Detail

The Estimate Item Detail window displays the item quantities from authorized DWRs.

![Figure 47. Estimate Item Detail Window](image1)

![Figure 48. Estimate Item Detail Window (Pending estimate with discrepancies)](image2)

THE OFFICE STAFF AND DISTRICT SUPERVISOR MAY VIEW THE ESTIMATE ITEM DETAIL WINDOW TO VERIFY THE ITEM QUANTITIES FOR PAYMENT ON THE ESTIMATE.

IF THERE IS NO PENDING OR REJECTED ESTIMATE FOR THE CONTRACT, YOU WILL SEE CUMULATIVE TOTALS FOR ALL ITEMS ON ESTIMATES.
Exercise 21

In this exercise, view the Estimate Item Detail for an estimate on a contract.

User ID jj00029
Password pass
Connection Training Server
Group Name FIELD – Office Staff [OSTAFF]
Prior Keys TRN356e; 0002 (estimate)

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

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

3. Double-click the **Estimate Item Detail** icon. The system displays a message to inform you that no pending or rejected estimates exist for this contract.

4. To see items for all estimates, click **Yes**. The system displays the Estimate Item Detail window.

View an item.

5. Scroll to and select the following row:

   - Project Nbr 67004-3213-14, Line Item Number 2650, Item Code 606-02.03, Description **Steel Piles (10 INCH)**

6. What quantity was installed to date for this item? __________

7. What quantity was paid to date for this item? ___________

View another item.

8. Scroll to and select the following row:

   - Project Nbr, 67004-3213-14 Line Item Number 2690, Item Code 615-01.12, Description **PRESTRESSED CONCRETE BULB TEE BEAM (6" WEB)(BT-72)**

9. What quantity was installed to date for this item? __________

10. What quantity was paid to date for this item? __________

THE ESTIMATE IS NO LONGER IN PENDING STATUS BECAUSE THE FIRST LEVEL OF APPROVAL WAS GIVEN BY THE PLUG IN. THE ESTIMATE IS NOW IN INAP STATUS.
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) (BMPB-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.

![Estimate Item Paybook Window](image)

**Figure 49. Estimate Item Paybook Window**

_The Estimate Item Paybook may be used to check amounts paid on each estimate for a particular item._
Exercise 22

In this exercise, view the Estimate Item Paybook for an estimate on a contract.

User ID jj00029 Password pass
Connection Training Server
Group Name FIELD – Office Staff [OSTAFF]
Prior Keys TRN356e; 0002 (estimate)

1. On the Estimate panel, double-click the Estimate Item Paybook icon. The system displays the Select Contract and Line Item window.

2. In the Contract ID column, scroll to and double-click TRN356e.

View an item.

3. In the Line Item area, scroll to and double-click the following row:

   Ln Itm Nbr 0700, Project 67004-3213-14
   Item Code 307-01.08 Description ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING B-M2

4. Has an adjustment been applied to this item? __________

View yet another item.

5. Click Open. The system displays the Select Contract and Line Item window.

6. In the Line Item area, scroll to and double-click the following row:

   Ln Itm Nbr 0670, Project 67004-3213-14
   Item Code, 307-01.01 Description ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A

7. Has an adjustment been applied to this item? __________

Prepare for the next exercise.

8. Close. The system closes the Estimate Item Paybook window and displays the Estimate panel.

9. Click the Contractor Payments tab. The system displays the Contract Payments panel.

You’ve viewed the Estimate Item Paybook for an estimate on a contract.
Viewing the Estimate Summary to Contractor Report

The BOE report, *Estimate Summary to Contractor*, displays the amounts to be paid to the contractor based on the estimate. The report summarizes previous payments made to the contractor and the current status of the contract when the estimate is generated. An itemized description of quantities and amounts on all items in every project contained in the estimate is also given.

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

![BOE Report - Estimate Summary to Contractor - Prompts](image)

Figure 50. BOE Report - Estimate Summary to Contractor - Prompts
Figure 51. BOE Report - Estimate Summary to Contractor [RR004] (initial page)

Figure 52. BOE Report - Estimate Summary to Contractor [RR004] (detail of subsequent page)
THE OFFICE STAFF / DISTRICT SUPERVISOR WILL REVIEW THE ESTIMATE SUMMARY TO CONTRACTOR REPORT TO ENSURE THAT THE LINE ITEM PAYMENT IS CORRECT AND TO ENSURE THE ITEM CATEGORIES ARE CORRECT. IF CHANGES ARE REQUIRED, THE OFFICE STAFF WILL FOLLOW THE ESTIMATE CORRECTION PROCEDURE. REMINDER: IF THE ESTIMATE MUST BE RE-GENERATED, THE ESTIMATE MUST FIRST BE RETURNED TO PENDING STATUS IN THE ADJUSTMENTS PLUG-IN BEFORE THE ESTIMATE IS DELETED AND GENERATED AGAIN.

Exercise 23

In this exercise, view the BOE report, Estimate Summary to Contractor, for an estimate on a contract.

User ID        jj00029  Password  pass
Connection      Training Server
Group Name      FIELD – Office Staff [OSTAFF]
Prior Keys      TRN356e; 0002 (estimate)

Note: For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to answer the questions.

1. In Figure 51, what is the amount due to the contractor before adjustments on this estimate? ________________

2. In Figure 51, are there any material discrepancies adjustments on this estimate? ____________________________.

3. In Figure 51, what is the amount of the material discrepancies adjustments on this estimate? ________________

4. In Figure 51, are there any stockpile payments on this estimate? ______

5. In Figure 52, for line item number 0670, item code 307-01.01, what is the total quantity installed on this estimate? ______

6. In Figure 52, for line item number 0670, item code 307-01.01, what is the total quantity deducted? ___________________

7. In Figure 52, for line item number 0670, item code 307-01.01, what is the total amount for the material discrepancy adjustment? __________________

Prepare for the next exercise.

8. Exit SiteManager.

You’ve viewed the Estimate Summary to Contractor report.
Approving Estimates

The Estimate Approval window allows the authorized reviewers to approve all estimate types—progress, final, or supplemental. The approval process provides an audit trail and prepares the estimate for the creation of the extract file that is used by the Tennessee Department of Transportation’s financial system. The approval process is conducted by a chain of approvals established during SiteManager installation or at contract setup. Each approval level corresponds to a user group within SiteManager.

The estimate is approved starting with the first level (Office Staff) and is completed with the last reviewer who indicates that the estimate is ready for payment. Once the last approval level has approved the estimate, a generic file layout is created which contains all payment information required by TDOT’s financial system and available in SiteManager.

Figure 53. Estimate Approve Window
THE PROGRESS ESTIMATE IS APPROVED BY THE FOLLOWING PERSONNEL: OFFICE STAFF (APPROVAL GIVEN IN ADJUSTMENT PLUG-IN), DISTRICT SUPERVISOR, AND FINANCE STAFF

THE FINAL ESTIMATE AND SUPPLEMENTAL ESTIMATES ARE APPROVED BY THE FOLLOWING PERSONNEL: OFFICE STAFF, DISTRICT SUPERVISOR, REGIONAL DIRECTOR REP, FINANCE STAFF, DIRECTOR OF CONSTRUCTION

THE STANDARD TDOT ESTIMATE WORKFLOW IS:
1. GENERATE THE ESTIMATE
2. VERIFY AND FIX APPROPRIATE DISCREPANCIES
3. REGENERATE THE ESTIMATE, IF CORRECTIONS MADE TO MATERIAL DISCREPANCIES
4. OVERRIDE DISCREPANCIES, AS APPROPRIATE
5. RUN PRICE ADJUSTMENT PLUG IN

SINCE THE CALCULATION OF ADJUSTMENTS IN THE ADJUSTMENTS PLUG-IN ADDS THE FIRST LEVEL OF APPROVAL, OFFICE STAFF WILL NEVER USE THE ESTIMATE APPROVAL WINDOW. OTHER STAFF, (FOR EXAMPLE, DISTRICT SUPERVISORS) WILL USE THE ESTIMATE APPROVAL WINDOW.

PRIOR TO APPROVAL BY FINANCE STAFF, THE ESTIMATE MAY BE PLACED BACK TO PENDING STATUS FOR CORRECTIONS. ONCE THE ESTIMATE IS IN APPROVED STATUS (APPROVED BY FINANCE STAFF, THE ESTIMATE MAY NOT BE DELETED OR MODIFIED IN ANY WAY.

Exercise 24

In this exercise, log in as the second level approver of the estimate review the estimate amount, and approve an estimate for a contract.

User ID jj00031 Password pass
Connection Training Server
Group Name FIELD - District Operations Supervisor [PJSUPS]

1. Start and log onto SiteManager as user jj00031 while connected in server mode.

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

3. Double-click the Estimate icon. The system displays the Estimate panel.

ENSURE THIS IS UNDERSTOOD - ONCE ESTIMATE IS APPROVED AT FINAL LEVEL OF APPROVAL, IT MAY NOT BE DELETED OR MODIFIED.
View the Estimate Summary window.

4. Double-click the Estimate Summary icon. The system displays the Estimate Summary window.

5. In the Contract area, scroll to and double-click TRN356d.

6. In the Estimate area, double-click 0002.

7. What amount will be paid to the contractor? ________________

8. Close. The system closes the Estimate Summary window and displays the Estimate panel.

View the overridden and unresolved discrepancies.

9. Double-click the Estimate Discrepancy icon. The system displays the Estimate Discrepancies window.

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

Approve the estimate on the District Supervisor level.

11. On the Estimate panel, double-click the Estimate Approval icon. The system displays the Select Contract/Estimate window.

12. In the Contract ID column, scroll to and double-click TRN356d.

13. For the District Supervisor level, select the Approved check box.

14. Save.

15. Close. The system displays a message to inform you that a notification was sent to the next approval level.

16. In the message, click OK. The system closes the window and displays the Estimate panel.

You’ve approved the estimate.
Tracking Estimates

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

Figure 54. Estimate Tracking Window

Exercise 25

In this exercise, track an estimate.

User ID j00031  
Password pass 
Connection Training Server  
Group Name FIELD - District Operations Supervisor [PJSUPS]  
Prior Keys TRN356d; 0002 (estimate)

1. On the Estimate panel, double-click the Estimate Tracking icon. The system displays the Estimate Tracking window.

2. What date was the estimate generated? ____________

3. Who generated the estimate? ______________________

Now that you know who generated the estimate, if you wish to reject or stop the estimate, contact that person.

4. Exit SiteManager.

You’ve tracked an estimate.
Viewing the Estimate History

The Estimate History window allows the selection and display of all estimates for a contract. Clicking the Open button displays the estimate number or the period end date of the estimate entered to define the starting row. The estimates will display from most recent to the oldest. The Estimate History window can also be used to navigate to the Estimate Summary and Estimate Discrepancy windows for an estimate using the Services menu.

Figure 55. Estimate History Window

THE OFFICE STAFF PERSONNEL WHO GENERATED THE ESTIMATE MAY DELETE A PENDING ESTIMATE IN THE ESTIMATE HISTORY WINDOW UNTIL THE ADJUSTMENT PLUG-IN HAS BEEN USED TO APPLY ADJUSTMENTS.
Exercise 26

In this exercise, log in and open the Estimate History window to view the status of an estimate for a contract that a District Supervisor wishes to stop.

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

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

Open the Estimate History window.

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

3. Double-click the Estimate icon. The system displays the Estimate panel.

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

5. In the Contract ID column, scroll to and double-click TRN356f. 
The system displays the Estimate History window.

6. What is the status of estimate 0002? ___________________

7. What is the net pay for estimate 0002? ___________________

8. Close. The system displays the Estimate panel.

You’ve viewed the Estimate History window.
Using the Estimate History Window to Delete a Pending Estimate

Users can also use the Estimate History window to delete a pending estimate.

**IT IS CRITICAL THAT THE APPROPRIATE WORKFLOW IS FOLLOWED SO THAT THE ESTIMATE PLUG-IN WILL CALCULATE ADJUSTMENTS PROPERLY. ALWAYS GENERATE THE PENDING ESTIMATE AND ADDRESS ALL ISSUES PRIOR TO RUNNING THE PLUG-IN.**

**IF AN ESTIMATE MUST BE DELETED AND GENERATED AGAIN AFTER THE PLUG-IN IS RUN, ALWAYS USE THE RETURN TO PENDING BUTTON IN THE ADJUSTMENTS PLUG-IN TO RETURN THE ESTIMATE TO PENDING AND DELETE THE ADJUSTMENTS BEFORE DELETING THE ESTIMATE.**

**ONCE THE ESTIMATE IS IN APPROVED STATUS (HAVING HAD THE FINAL LEVEL APPROVAL GIVEN), IT MAY NOT BE DELETED OR MODIFIED IN ANY WAY.**

---

**Exercise 27**

In this exercise, remove line item adjustments made by the Adjustments plug-in and delete an estimate for a contract.

**User ID** jj00029  **Password** pass  **Connection** Training Server  **Group Name** FIELD – Office Staff [OSTAFF]  **Prior Keys** TRN356f; 0002 (estimate)

Undo adjustments and return the estimate to Pending status.

1. In the SiteManager Panel window, click the **Main Panel** tab. The system displays the Main Panel panel.
2. Double-click the **Contract Administration** icon. The system displays the Contract Administration panel.
3. Double-click the **Contract Records** icon. The system displays the Contract Records panel.
4. Double-click **Contracts** icon. The system displays the Contracts window.
5. On the toolbar, click the **Attachments** button. The system displays the Attachments window.

AN UPCOMING SECTION WILL ADDRESS HOW TO ADJUST QUANTITIES ON AN APPROVED ESTIMATE.
6. **In the Name column, double-click Adjustments.** The system displays the Adjustments plug-in window.

7. **On the toolbar, click the Return to PEND button.** The system displays a message to confirm that you wish to return the estimate status to pending.

8. **In the message, click Yes.** The system changes the estimate status to Pending and deletes the system-generated adjustments.

9. **On the toolbar, click Exit.**
Delete the estimate.

10. Click Close. The system closes the Contracts window and displays the Contract Records panel.

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

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

13. Double-click the Estimate icon. The system displays the Estimate panel.

14. Double-click the Estimate History icon. The system displays the Estimate History window.

15. In the Estimate Number column, select 0002.

16. What is the status of estimate 0002? __________________

17. In the Net Pay column, take note of the value.

    **Note:** In Production, the system will change the net pay by the value of the adjustments deleted when returning the estimate to Pending status.

18. On the toolbar, click the Delete button. The system displays a message to confirm that you wish to delete the estimate.

19. In the message, click Yes.

    *At this time in the process, you may generate a replacement estimate, add additional DWRS, and make price and pay adjustments.*

20. Close. The system closes the Estimate History window and displays the Estimate panel.

Prepare for the next exercise.

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

    You’ve removed line item adjustments made by the Adjustments plug-in and deleted an estimate for a contract.
Understanding the Progress Status Window

After the progress estimate is approved, contracts that are 15% behind or more OR contracts that will not be complete by the Adjusted Completion Date (Original Completion Date, if no fully approved time extension change order exists) require additional information regarding project completion which must be entered in the Progress Status window. This data will be included on the monthly BOE report, Progress.

Figure 58. Progress Status Window

- **Estimated Completion Date:**

  If the contract completion date is anticipated to be later than the Adjusted (or Original, if no fully approved time extension change order exists) Completion Date, enter the new date into the Estimated Completion Date field.

  If you are filling out this window because the contract is 15% behind and the contract completion date is anticipated to be the same (or earlier) than the Adjusted (or Original, if no fully approved time extension change order exists) Completion Date, enter that same date into the Estimated Completion Date field.

- **Reason Code:**

  Select a Reason Code from the dropdown that best describes why this contract has a new Estimated Completion or why the contract is 15% behind schedule. A summary report is run at HQ monthly to categorize contracts based on the reason selected.

- **Reason Behind:**

  Enter the reason that this contract has a new Estimated Completion Date or why this contract is 15% or more behind schedule.

  Once all data entry is complete, designated representatives from the field office and/or region should run the BOE report, Progress, to review the data for accuracy. A statewide progress report is run monthly and distributed through the department which displays information based on these entries.
Exercise 28

In this exercise, complete the Progress Status window.

User ID jj00029 Password pass
Connection Training Server
Group Name FIELD – Office Staff [OSTAFF]
Prior Keys TRN356f

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

2. Double-click the Contract Records icon. The system displays the Contract Records panel.

3. Double-click the Progress Status icon. The system displays the Progress Status window.

Create a Progress Status record.

4. In Estimate Completion Date field, type 06/20/18.

5. In the Reason Code dropdown list, select Utilities Relocations.

6. In the Reason Behind field, type AT&T is not finished with relocating utility lines on SR 84.

7. Save.

8. Close. The system closes the Progress Status window and displays the Contract Records panel.

Prepare for the next exercise.

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

You’ve created a progress status record.
**Viewing the Progress Report**

The BOE report, *Progress*, lists the contracts for the region(s)/offices(s) selected that are active and not yet complete. This report notes if each contract is on time and/or what percent it is behind.

Contracts will appear on the BOE report, *Progress*, upon activation by the Finance Office. Contracts will be removed from the BOE report, *Progress*, when the critical date, Contractor Final Release Date (the last day a claim can be submitted) has passed.

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

![BOE Report – Progress – Prompts](image)

Figure 59. BOE Report – Progress – Prompts
IT IS IMPORTANT THAT ALL COMPLETION DATA IS KEPT CURRENT. SITEMANAGER SHARES COMPLETION DATES WITH OTHER SYSTEMS IN THE DEPARTMENT. IN ADDITION, EXECUTIVE MANAGEMENT REVIEWS THE BOE PROGRESS REPORTS REGULARLY TO CHECK ON THE STATUS OF PROJECTS.
Exercise 29

In this exercise, review the BOE report, Progress.

Note: For training only, the remainder of this exercise in italicized text will not be completed in the application. Instead, refer to the screen captures to answer the questions.

1. Review Figure 60 and Figure 61.

2. Which contracts are 15% or more behind?

3. Do these contracts have a Reason Behind explanation? ___

You’ve reviewed the BOE report, Progress.
Correcting Quantities Previously Paid on Estimates

Use the Quantity Correction plug-in to correct pay item quantities on Progress estimates that have reached final approval.

**Figure 62. Quantity Adjustments Plug-In Window**

The steps to use the Quantity Correction plug-in are as follows and are detailed on the following pages.

1. Run the Quantity Correction plug-in. (Main Panel > Contract Administration > Contracts > select Contract > click Attachments button > double-click Quantity Correction)
2. Select the DWR Date that included the quantity to be corrected.
3. Select the ITEM that included the quantity to be corrected.
4. In the Correct Quantity field, type the quantity that **should have been recorded** on the DWR.
5. Press the tab key to allow the program to calculate and display the quantity for the adjustment (Incorrect Quantity - Correct Quantity).
6. In the Remarks/Calculations field, type a remark to explain why the correction was needed.
7. Save.

**ONLY THE ORIGINATOR OF THE DWR CAN MODIFY ANY OF THE QUANTITIES ON THAT DWR USING THE QUANTITY CORRECTION PLUG-IN.**

**A DWR QUANTITY CAN ONLY BE CORRECTED ONE TIME USING THE QUANTITY CORRECTION PLUG-IN.**

**THE QUANTITY CORRECTION PLUG-IN CREATES A SYSTEM GENERATED DWR. THIS DWR MUST BE AUTHORIZED BEFORE THE CORRECTION IS INCLUDED ON AN ESTIMATE.**
Exercise 30

In this exercise, use the Quantity Correction plug-in to adjust an incorrect quantity on an approved DWR on a fully approved estimate.

User ID  jj00029  Password  pass
Connection  Training Server
Group Name  FIELD – Office Staff [OSTAFF]
Prior Keys  TRN356f

Open the contract and Quantity Correction plug-in.

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

2. Double-click the Contract Records icon. The system displays the Contract Records panel.

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

4. On the toolbar, click the Attachments icon.

Note: The remaining italicized steps cannot be completed in the training environment. The following steps and screen shots demonstrate the process steps.

5. Double-click the Qty Correction plug-in. The system displays the Quantity Adjustments window with the contract and inspector automatically selected.

![Figure 63. Quantity Adjustments Window](image)
6. In the DWR Date of Incorrect Qty field, select 08/05/2014, the DWR with the incorrect quantity. The system displays the work items recorded on the DWR for the selected date.

![Quantity Adjustments Window](image)

*Figure 64. Quantity Adjustments Window*
7. Select the following row for the DWR item with the incorrect placed quantity:

Project Number 67004-3213-14, Category Number 0100, Line Item Number 0010, Item Code 105-01, Description CONSTRUCTION STAKES, LINES AND GRADES, Location Main Road.

The system displays an area to make the correction.

![Figure 65. Quantity Adjustments Window](image)

8. In the Correct Quantity field, type 0.400.

9. On the keyboard, press the Tab key. The Quantity Correction plug-in shows the calculated adjustment in the Adjustment field.

10. In the Remarks/Calculations field, type Corrected typo that resulted in an incorrect quantity being recorded.
11. **Save.** The system displays a message to inform you that once saved, the correction is not editable.

![Continue? Window](image)

**Figure 66. Continue? Window**

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

13. The system displays a message to inform you that a quantity has been adjusted for that line item number.

![Untitled Message Window](image)

**Figure 67. Untitled Message Window**

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

15. On the toolbar, click **Exit Application**.

Prepare for the next exercise.

16. To close the Contracts window, click **Close**. The system displays the Contract Records window.

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

You’ve viewed how to adjust an incorrect quantity on an approved DWR in the Quantity Correction plug-in.
Viewing DWRs Created by the ‘Quantity Correction’ Plug-in

The ‘Qty Correction’ plug-in attachment opens the Quantity Adjustments window and creates QTYADJ DWRs to adjust paid quantities on progress estimates that have already reached final approval. These may be viewed in the DWR window.

The auto created QTY ADJ DWRs are not authorized and will need to be authorized in the Diary window to be included in the next progress estimate.

![Daily Work Reports Window](image)

Figure 68.  Daily Work Reports Window
Exercise 31

In this exercise, view the DWR resulting from the Quantity Correction plug-in.

User ID jj00029 Password pass
Connection Training Server
Group Name FIELD – Office Staff [OSTAFF]
Prior Keys TRN356f

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

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

3. On the toolbar, click Open. The system displays a message prompting you to save changes.

4. In the message, click No. The system displays the Contract ID window.

5. In the Inspector area, in the User ID column, double-click QTYADJ1.

6. In the Date area, in the DWR Date column, double-click 09/10/14. The system displays a message to inform you that the DWR will be opened in a read-only format.

7. In the message, click OK. The system displays the Daily Work Reports window.

View the installed work item.

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

9. Double-click the following row:

   Project Number 67004-3213-14, Line Item Number 0010, Category Number 0100, Item Code 105-01, Description CONSTRUCTION STAKES, LINES AND GRADES.

10. What is the placed quantity? ____________

View the remark.

11. On the toolbar, click the Remarks button. The system displays the Remarks window.

12. View the remark.

13. To close the Remarks window, click the Remarks button again. The system closes the Remarks window.

You’ve viewed the DWR resulting from the Qty Correction plug-in.
Summary

To access Contractor Payment reports:

1. On the Contractor Payments panel, double-click the Reports icon.
2. Double-click the icon for the desired report.

To generate a progress estimate:

1. On the Contractor Payments panel, double-click the Estimate icon.
2. On the Estimate panel, double-click the Generate Estimate icon.
3. Scroll to and click the desired contract.
4. Click OK.
5. If desired, on the calendar, click the end date.
6. Click the Generate Estimate button.
7. If the estimate already exists for this generation period, and you want to delete it, click YES.
8. Click OK.
9. Click OK.

To open the Estimate Summary window:

1. On the Contractor Payments panel, double-click the Estimate icon.
2. On the Estimate panel, double-click the Estimate Summary icon.
3. On the Select Contract and Estimate window, in the Contract area, scroll to and click the desired contract.
4. In the Estimate area, scroll to and click the desired estimate.
5. Click OK.
To open the Estimate Discrepancies window:

1. On the Estimate panel, double-click the Estimate Discrepancy icon.
2. On the Select Contract and Estimate window, in the list box, scroll to and double-click the desired contract.
3. In the list box, scroll to and click the desired estimate.
4. Click OK.

To navigate to the correct window to resolve the discrepancy:

1. On the Estimate panel, double-click the Estimate Discrepancy icon.
2. On the Select Contract and Estimate window, scroll to and double-click the desired contract.
3. Scroll to and click the desired estimate.
4. Click OK.
5. Click the discrepancy to be resolved.
6. Click the Navigation button.
7. Make the necessary changes.
8. Save.

To override estimate discrepancies:

1. On the Estimate Discrepancies window, click the discrepancy to be overridden.
2. In the Status dropdown list, for the current selection, select Override.
3. Add remarks and click the Remarks button.
4. Repeat steps 1-3 to override additional discrepancies.
5. Save.
To recalculate estimate discrepancies:

1. Resolve the discrepancies of the estimate.
2. On the Estimate panel, double-click the Estimate Discrepancy icon.
3. Open the estimate to be recalculated.
4. On the Services menu, select Recalculate Discrepancies.
5. Click YES.
6. Click OK.

To open the Adjustments plug-in:

1. On the Main Panel panel, double-click the Contract Administration icon.
2. On the Contract Administration panel, double-click the Contracts Records icon.
3. On the Contract Records panel, double-click the Contracts icon.
4. On the Select Contract window, select the contract.
5. On the toolbar, click the Attachments button.

To make adjustments with the Adjustments plug-in:

1. Open the Adjustments plug-in.
3. On the Adjustment Setup panel, enter Mix Design (DA) and Recycled Asphalt (RA) percentages and dates for the pay items included in the estimate and listed.
4. On the Adj. Process Submission panel of the TDOT Price Adjustments window, confirm all messages have been satisfied for the estimate adjustments.
5. On the Adj. Process Submission panel, click the Calc. button to generate adjustments to the estimate and provide first level approval of the estimate.
6. On the **Fuel Adjustment Items, Bitm Adjustment Items, 307 A/C Adjustment Items, 411 A/C Adjustment Items** and **Liquid Anti-strip** panels, view adjustments made by the system.

To view a Line Item Adjustment:

1. On the Contractor Payments panel, double-click the **Contract Adjustments** icon.
2. On the **Contract Adjustments** panel, double-click the **Line Item Adjustments** icon.
3. On the Select Contract and Estimate window, in the list box, scroll to and double-click the desired contract.
4. In the list box, scroll to and click the desired estimate.
5. Click **OK**.

To view an estimate item:

1. On the **Estimate** panel, double-click the **Estimate Item Detail** icon.
2. On the Contract window, in the **Contract** area, scroll to and click the desired contract.
3. Click **OK**.
4. On the **Services** menu, select **View Estimate**.

To view the Estimate Item Paybook:

1. On the **Contractor Payments** panel, double-click the **Estimate** icon.
2. On the **Estimate** panel, double-click the **Estimate Item Paybook** icon.
3. On the Select Contract and Line Item window, in the list box, scroll to and double-click the desired contract.
4. In the list box, scroll to and double-click the desired line item.
To approve an estimate:

1. On the Estimate panel, double-click the Estimate Approval icon.
2. In the list box, scroll to and click the desired record.
3. Click the Approved check box (ON) for your level.
4. Click Ok.
5. Click the Save button.
6. When complete, click the Close button.

To track an estimate:

1. On the Estimate panel, double-click the Estimate Tracking icon.
2. Click the Open button.
3. In the list box, scroll to and click the desired record.

To view an estimate history:

1. On the Estimate panel, double-click the Estimate History icon.
2. In the list box, scroll to and click the desired Contract and estimate number.
3. Click OK.
4. When through, click the Close button.

To put an estimate in pending status using the Adjustment plug-in after the first level of approval:

1. Open the Adjustments plug-in.
2. On the toolbar, click the Return to PEND button. The Adjustments program displays a message to confirm that you wish to return the estimate status to Pending.
3. In the message, click the Yes button. The Adjustments program changes the estimate status to Pending and deletes the system-generated adjustments.
To open the Quantity Correction program:

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

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

3. On the Contract Records panel, double-click the Contracts icon.

4. On the Select Contract window, select the contract.

5. Click the Attachments button on the toolbar.

6. Double-click the Quantity Correction Program.

To correct an item quantity on a paid estimate using the Quantity Correction program (plug-in):

1. Open the Quantity Correction Program.

2. Select the DWR date that included the quantity to be corrected.

3. Select the item that included the quantity to be corrected.

4. In the Correct Quantity field, type the quantity that should have been recorded on the DWR.

5. On the keyboard, press the Tab key to allow the program to calculate and display the quantity for the adjustment (Incorrect Quantity - Correct Quantity).

6. In the Remarks/Calculations field, type a remark to explain why the correction was needed.

7. Save.
To view a Quantity Correction DWR:

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

2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon. SiteManager displays the Daily Work Reports window.

3. On the toolbar, click the **Open** button. The system displays the Contract ID window.

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

5. In the **Inspector** area, double-click **QTYADJ1**.

6. In the **Date** area, double-click the date. The system displays a message to inform you that the DWR will be opened in a read-only format.

7. In the message, click the **OK** button. The system displays the Daily Work Reports window.

8. Click the **Work Items** tab.

9. Double-click the row for the corrected item.
Review Exercise

In this exercise, perform the estimate process activities for a contract.

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

1. In Figure 5, does the BOE report, DWR Template, show any
   DWRs not authorized for inclusion on the next estimate? ______

2. Navigate to the Estimate Summary window for contract
   TRN370e estimate 0002.

3. What are the item earnings for estimate 0002? ______________

4. Are there discrepancies on estimate 0002? _______

5. Navigate to the Estimate Discrepancy window.

6. What types of discrepancies exist on this estimate?
   ______________________________________________________

7. From the Estimate Discrepancy window, navigate to the
   Checklist Event Dates window and resolve the discrepancies
   caused by the missed checklist event.

8. Enter 09/05/14 as the actual date for the Prompt Payment to
   Subcontractor event type due on 09/01/14.


10. Recalculate the estimate discrepancies.

11. How many discrepancies are now on estimate 0002? __

12. Navigate to the Line Item Adjustment window for contract
    TRN370e estimate 0002.

13. How many adjustments have been applied to estimate 0002? __

14. Navigate to the Estimate Item Detail window.

15. View estimate item details for the following:
    Item Code 307-01.01, Line Item Number 0670,
    ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A.

16. What quantity was installed to date? ______________

17. Exit SiteManager.
Additional Reports

The following reports will be used at various times:

- **Contract Items to Material Codes**
- **Samples by Status**
- **Installed Work (Unpaid Installed Quantity Summary)**
- **Installed Work Items**

**Viewing the Contract Items to Material Codes Report**

BOE report, *Contract Items to Material Codes*, is used to find the new material code associated to a contract line item.

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

![BOE Report - Contract Items to Material Codes – Prompts](image)


<table>
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<th>Item Description</th>
<th>Material Code</th>
<th>Material Field Name</th>
<th>Acceptance Method</th>
<th>Sample Number</th>
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<td>1284</td>
</tr>
</tbody>
</table>

Figure 70. BOE Report - Contract Items to Material Codes
**Viewing the Samples by Status Report**

BOE report, *Samples by Status*, is used to find samples using the many prompts provided. Three prompts are required, but the rest are optional so you can enter the information that you know.

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

Prompt choices include: sample dates, sample status, sample type, contract, lab unit, producer/supplier, region/county name, material category, material, sampler/tester and authorized dates

![BOE Report - Samples by Status (RR001) - Prompts (part 1 of 4)](image)

Figure 71. BOE Report - Samples by Status (RR001) - Prompts (part 1 of 4)
Figure 72. BOE Report - Samples by Status (RR001) - Prompts (part 2 of 4)
Figure 73. BOE Report - Samples by Status (RR001) - Prompts (part 3 of 4)
Figure 74. BOE Report - Samples by Status (RR001) - Prompts (part 4 of 4)
Figure 75. BOE Report - Samples by Status (RR001) (initial page)

Figure 76. BOE Report - Samples by Status (RR001) (final page)
Viewing the Installed Work (Unpaid Installed Quantity Summary) Report

Standard system report, Installed Work, lists all installed quantities not yet tied to an estimate.

Navigation: Contractor Payments > Reports > Installed Work

![System Report - Installed Work (Unpaid Installed Quantity Summary)](image.png)

Figure 77. System Report - Installed Work (Unpaid Installed Quantity Summary)
Viewing the Installed Work Items Report

BOE report, *Installed Work Items*, lists all installed items for the selected contract. The final page of the report lists all items that have zero installed quantities.

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

Figure 78. BOE Report - Installed Work Items - Prompts
Figure 79. BOE Report - Installed Work Items (initial page)

Figure 80. BOE Report - Installed Work Items (subsequent page)
Creating Disputes/Claims (Contract Change Requests) and Correspondence Logs for Office Documentation

In this chapter, receive instruction about the following:

- Creating Disputes/Claims  
- Creating Correspondence Logs  
- Summary  
- Review Exercise

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<th>Topic</th>
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</table>
Documenting and Tracking Contract Change Requests

Use the Disputes/Claims window to create a record for each Contract Change Request occurrence. In conjunction with the Disputes/Claims window, use the Correspondence Log window to attach and track all correspondence in relation to the request.

Creating Disputes/Claims

Use the Disputes/Claims window to capture data when conditions arise on a project that may require a change to the contract. Upon written detailed notification from the contractor providing information required in Section 104.03 of the Standard Specifications, create a dispute/claim for each contract change request occurrence in SiteManager including the following:

- **Contractor Written Notification Date** - Date the written detailed notification is received providing the information required in Numbers 1, 2 and 3 of Section 104.03 A.

- **Change Type** - Select the appropriate type based on Section 104.02:
  - Differing Site Conditions
  - Suspension of Work by Engineer
  - Change in Character of Work
  - Extra Work
  - Eliminate Items

- **Status** - Select the appropriate status based on Section 104.03, 109.04 or 105.16 and as the change request progresses.

- **Status Date** - Update each time the Status changes.

- **Request Description** - Enter a brief description summarizing the requested change.
Figure 1. Disputes / Claims Window
Exercise 1

In this exercise, create a dispute/claim record.

User ID  jj00016        Password  pass
Connection  Training Server
Group Name  FIELD - Operations Office Staff [OSTAFF]

1. Start and log onto SiteManager as user jj00016 while connected in server mode.

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

3. Double-click the Contract Records icon. The system displays the Contract Records panel.

4. Double-click the Dispute/Claims icon. The system displays the Disputes / Claims window.

5. From the Services menu, select Choose Keys. The system displays the Select Contract window.

6. In the Contract ID column, double-click TRN349. The system displays the Disputes / Claims window.

7. In the Contractor Written Notification Date field, type 110214.

   ONCE THIS DATE IS ENTERED IT IS NEVER CHANGED.

8. In the Change Type dropdown list, select A. Differing Site Conditions.

9. In the Status dropdown list, select 01 Under Review.

10. In the Status Date field, type 110214.

11. In the Request Description field, type Dement requesting item 709-05.06 to be added by Change Order to contract. Material will be used on abutment slopes. No time extension requested.

12. Save.

13. Close. The system displays the Contract Records panel.

You’ve created a dispute / claim record.
Creating Correspondence Logs

Once a contract change request has been set up in the Disputes/Claims window, track all correspondence using the Correspondence Log window and linked back to the Disputes / Claims record.

![Figure 2. Correspondence Log Window](image)

Use the following fields to facilitate tracking of change requests documentation:

- **Correspondence Type** - Select based on Sections 104.03 and 105.16.
- **On** - Date the correspondence is sent or received.
- **From** - Either Contractor or TDOT.
- **To** - Either Contractor or TDOT.
- **Dispute** – Right-click and select the Search option to locate the appropriate dispute/claim record affiliated with this correspondence.

In addition, scan and attach copies of all supporting documents to this window.

| CORRESPONDENCE SHOULD CONTINUE TO BE LOGGED AND ATTACHED IN THE CORRESPONDENCE LOG UNTIL THE DISPUTE/CLAIM HAS BEEN RESOLVED. A CONTRACT CHANGE REQUEST WILL TYPICALLY HAVE ONE DISPUTE/CLAIM SET UP WITH MULTIPLE ENTRIES IN THE CORRESPONDENCE LOG LINKED TO IT. |

**AASHTOWare Project SiteManager™ Training Guide for TDOT**
Exercise 2

In this exercise, create a correspondence log record.

User ID       jj00016    Password    pass
Connection    Training Server
Group Name    FIELD - Operations Office Staff [OSTAFF]
Prior Keys    TRN349

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

Create the correspondence log record.

2. In the Correspondence Type dropdown list, select 01 Detailed Written Notification.

3. In the unlabeled dropdown list to the left of the On field, select Received.

4. In the On field, type 041415.

5. In the Sent From field, type Contractor.

6. In the Sent To field, type TDOT.

7. In the Major Topics field, type CO Request written notification from contractor attached.

8. Save.

Link the correspondence log record to the dispute/claim record.

9. In the Related Correspondence field, right-click and select Search. The system displays the Search window.

10. In the Corr Srl Nbr column, double-click 1.

11. In the Dispute ID field, type 1.

12. Save.
Attach a file.

14. On the toolbar, click the **Attachments** button. The system displays six more attachment-related buttons on the toolbar.

15. On the toolbar, click the **New OLE** button. The system displays the Insert Object window.

16. Click the **Create From File** tab. The system displays the Create From File panel.

Locate the file to attach.

17. Click the **Browse** button. The system displays the Browse window.

18. Select the file to be attached: 
   \texttt{C:\SMTRAINS\SMFILES\Contract Change Notification - R&D Excavation.pdf}

19. **Open**. The system displays the path to the selected file in the File Name field.

20. Click the **OK** button. The system displays the OLE Attachment window.

Describe the attachment.

21. In the **Name** field, type **CNQ165 SR58**.

22. In the **Description** field, type **Additional grading required**.

Provide access to the attachment.

23. In the **Attachment Security** area, click the **Add All** button. The system moves all the selected security groups from the left pane to the right pane.

24. Click the **Add** button. The system closes the OLE Attachment window.

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

26. **Save**.
View the attachment.

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

28. In the **Description** column, select **Additional grading required**.

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

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

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

32. **Save**.

33. **Close**.

*You’ve created a correspondence log, linked it to the dispute/claim record and attached a file.*
Summary

To create a dispute claim record:

1. Open the Disputes / Claims window.

2. From the Services menu, select Choose Keys. The system displays the Select Contract window.

3. In the Contract ID column, double-click the desired contract.

4. In the Contractor Written Notification Date field, type the desired date.

5. In the Change Type dropdown list, select the desired change type.

6. In the Status dropdown list, select the desired status.

7. In the Status Date field, type the desired date.

8. In the Request Description field, type the desired request description.

9. Save.

To create a correspondence log:

1. Open the Correspondence Log window.

2. In the **Correspondence Type** dropdown list, select the desired choice.

3. In the unlabeled dropdown list to the left of the On field, select the desired choice.

4. In the **On** field, type the desired date.

5. In the **Correspondence ID** field, type the desired ID.

6. In the **Sent From** field, type the desired sender.

7. In the **Sent To** field, type the desired recipient.

8. In the **Document Category** dropdown list, select the desired document category.

9. In the **Document Location** field, type the desired document location.

10. In the **Major Topics** field, type the desired text.

11. In the **Related Correspondence** field, search for and select the related correspondence.

12. In the **Required Response Text** field, type the desired text.

13. In the **Dispute ID** field, search for and select the related dispute.

14. **Save**.

To attach a file to a record:

1. Click the **Attachment** button.

2. Click the **New OLE** button.

3. Click the **Create from File** tab.

4. Click the **Browse** button.

5. Select the drive and file name for the file to be attached.

6. **Open**.

7. Click **OK**.
8. In the **Name** field, type the name for the document.

9. In the **Attachment Security** box, click the **Add All** button to add all groups to the **Access** box.

10. Click the **Add** button.

11. Click the **Attachment** button.

12. **Save.**
Review Exercise

In this exercise, create a dispute/claim record and a correspondence log.

User ID jj00016 Password pass
Connection Training Server
Group Name FIELD - Operations Office Staff [OSTAFF]
Prior Keys TRN349

1. Create a dispute record:
   - Contractor Written Notification Date: 08/15/14
   - Change Type: C. Change in Character of Work
   - Status: 01: Under Review
   - Status Date: 09/01/14
   - Request Description: Disagreement on asphalt item best to use.

2. Create a correspondence log record:
   - Correspondence Type: 01 Detailed Written Notification
   - Status (unlabeled dropdown list): Received
   - On: 09/01/14
   - Sent From: Bailey Morgan, Inspector
   - Sent To: Highways, Inc Foreman

3. Add an attachment to the correspondence log record.
   - File name and location: C:\SMTRAiNS\SMFILES\Contract Change Notification - R&D Excavation.pdf
   - Name: CNQ165 SR58
   - Description: Additional grading required

4. Exit SiteManager.
Understanding Change Orders for Office Documentation (Part 1)

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

- Understanding General Change Order Concepts  2
- Understanding Change Order Headers            8
- Modifying Existing Contract Items            9
- Adding New Items to a Contract               12
- Creating Change Order Time Adjustments       15
- Applying Explanations                        18
- Viewing the Custom Change Order              21
- Viewing the Change Order Report              24
- Summary                                      26
- Review Exercise                              30
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](image1)

Figure 1. SiteManager Panel Window - Change Order Maintenance Panel
Exercise 1

In this exercise, navigate to the Change Order Maintenance panel.

User ID: jj00016  
Password: pass  
Connection: Training Server  
Group Name: FIELD – Operations Office Staff [OSTAFF]

1. Start and log onto SiteManager as user jj00016 while connected in server mode.

2. On the Main Panel, double-click the Change Orders icon. The system displays the Change Orders panel.

3. On the Change Orders panel, double-click the Change Order Maintenance icon. The system displays the Change Order Maintenance panel.

You’ve accessed the Change Order Maintenance panel.
Change Order Life Cycle

SiteManager software’s change order functions reflect the life cycle of contract change orders.

Creating a New Change Order

Only users with specific authority may create new change orders. Each change order must be associated with an existing active contract. Record specific information using the following Change Order window’s panels:

- Header
- Items
- Time Adjustments
- Explanations

Calculating Change Orders

After the full change order creation or maintenance activities are complete, including entries or updates to the change order items, time adjustments and explanations as desired, users may calculate the view-only CO Amount field value on the Header panel.

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 Change Orders

After it is created, a draft change order can be forwarded via In-Box notification for parallel review. Parallel review is concurrent review by more than one reviewer at a time.

The writer of the change order can also place the change order into Pending status and submit it for a hierarchical approval, skipping the review process.

Users involved in reviewing a draft change order or approving a pending change order can record their decisions about proposed changes to the contract using the Review/Approve window. Reviewers/approvers receive an In-Box message from the author requesting an action, review or approval for the change order. The In-Box message specifies the contract and change order number.

When a change order that is in Pending status (in the approval process) is given the recommendation “Denied” in the Change Order Review/Approve window, it remains in Pending status. The change order creator may choose to change the status to Draft to make modifications, then change it back to Pending to resubmit it for approval. If the change order will never be approved, it may be changed to Denied status on the Header panel. Once a change order is in Denied status, it may not be modified or submitted for review/approval.

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

Tracking Change Orders

At any time, the change order author may view the status of a change order in the review or approval cycle by opening the Tracking window.

The Tracking window for a change order is view-only and displays the following:

- Date a request for recommendation was sent to a reviewer or approver
- Reviewer or approver’s name
- Action requested - review or approve
- Date the reviewer or approver makes a recommendation
- Recommendation - approved or denied
- Any remarks the reviewer or approver has made

Authorized users may also display details about current and historic contract items using the Item Summary window.
**Reporting**

Once approved, change order data may be analyzed to help manage the change order process. The Change Order Reports function allows users to produce reports that gather information about trends in contract changes.

A PAPER COPY OF THE CHANGE ORDER IS STILL REQUIRED FOR PHYSICAL SIGNATURES. SITEMANAGER REFLECTS THE ELECTRONIC VERSION.

WHEN AN APPROVER PHYSICALLY SIGNS THE CHANGE ORDER, THAT APPROVER SHOULD ALSO INDICATE THEIR APPROVAL OF THE CHANGE ORDER IN SITEMANAGER.

**Understanding Change Order Status**

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

- **Draft**: A change order is Draft status while it is being created, edited, or forwarded for review.

- **Pending**: A change order is changed to Pending status when it needs to be submitted for the approval process. While in Pending status, the change order cannot be modified except for its status.

- **Pending (with a Recommendation of Denied)**: A change order in Pending status (under review) that received a recommendation of ‘Denied’ may have its status changed back to Draft. With a Draft status, the change order may be edited (revised), have its status changed to Pending, and be resent through the approval process.

- **Approved**: A change order is automatically placed in Approved status when the last approver completes the approval process – it is not a manual selection. When a final approval level approves a change order, it cannot be altered. Adjustments can only be made by creating a new change order.

- **Denied**: Changing the status to Denied causes it to become inquiry-only for the life of the contract. The Denied status is not available until the Change Order has been placed in Pending status.

WHEN THE CHANGE ORDER IS APPROVED, IT BECOMES READ-ONLY AND THE ITEMS BECOME AVAILABLE ON DWRS.
All change orders must be in either Approved or Denied status for the contract completion process.

| IF AN APPROVER SELECTS ‘DENY’ IN THE REVIEW/APPROVE WINDOW, THE CREATOR SHOULD CHANGE THE STATUS BACK TO DRAFT, MAKE CORRECTIONS, AND CHANGE IT TO PENDING IN THE HEADER WINDOW TO SUBMIT IT AGAIN. |
| IF AN APPROVER SELECTS ‘DENIED’ IN THE REVIEW/APPROVE WINDOW AND PROVIDES A REMARK INDICATING THAT THE CHANGE ORDER WILL NEVER BE APPROVED AND PROVIDES A REASON, THE CREATOR SHOULD CHANGE THE STATUS OF THE CHANGE ORDER TO DENIED IN HEADER WINDOW. |
| BEWARE: A CHANGE ORDER IN DENIED STATUS MAY NOT BE CHANGED TO DRAFT. |

**Understanding Change Order Functions**

The six types of change order functions include the following:

- **Overruns or Underruns** - Used when the existing contract items are either exceeded or not needed to complete the contract or work item.

- **Extra Work** - Used when additional work items are required to complete the contract.

- **Time Adjustments** - Used when the time frames need to be adjusted to reflect the completion period for a milestone or contract.

- **Zero Dollar** - Used only for contract adjustments that will not affect the dollar amount of the contract (for example, adding permits or special provision to the contract).

- **Force Account** - TDOT will not use this function. Force Account change orders will require the “Extra Work” function to be selected.

- **Final Quantity** - TDOT will not use this function.

Users define the purpose of the change order by selecting among the different functions. Except for Zero Dollar, users can specify more than one function to make up a change order.
**Understanding Change Order Headers**

Use the Change Order window’s Header panel to do the following:

- Create a new change order by entering new descriptive information.
- Maintain the current descriptive information about an existing change order as the status of the change order progresses from Draft through Pending to Approved or Denied.

![Change Order Window - Header Panel](image)

Figure 2. Change Order Window - Header Panel

**DESCRIPTION OF SEVERAL OF THE FIELDS FOLLOW:**

**STATUS** - The status of a change order is automatically set to Draft when created and must be changed to Pending to begin the approval process.

**DESCRIPTION** - User must enter a general description relating to the type of work.

**REASON CODE** - User selects the code that best describes the reason for the change order.

**CO TYPE** - User selects the appropriate category based on the change order policy 355-01. This also allows the change order form to be produced with the proper signatures lines.

Use "Time Adjustments Due to Quantity Increase" only during contract finalization when adding time due to quantity overruns. When this CO type is selected the change order should remain in draft status and the finance office notified when it is ready for processing. They will override approval rules, change the status to pending, and approve. This type of change order does not require signatures.

**FUNCTIONS** - User must select function associated with this change order. (See "Change Order Function" section for more details.)

**DISPUTE** - User should right-click and search to attach the related dispute.

All related supporting documentation should be attached to the header window.
Modifying Existing Contract Items

Use the Change Order window’s Items panel to do the following:

- Select an existing item on the contract.
- Add a new item to the contract.
- Delete an item from a project.

Whenever the change order function is an overrun/underrun and/or extra work, the Items panel must be used to make the corresponding entries and/or modifications to the change order items. Extra work requires adding completely NEW contract item(s). Overrun/underrun requires modifying existing contract pay items.

When modifying an existing contract item, click the Select Item button on the toolbar to bring up a list of existing contract items from which to select. Use the Quantity field to modify the item quantity.

Figure 3. Change Order Window – Items Panel
In this exercise, create a new change order to modify the quantity of an existing contract item.

**User ID** | **jj00016**  
**Password** | **pass**  
**Connection** | **Training Server**  
**Group Name** | **FIELD – Operations Office Staff [OSTAFF]**

1. On the Change Order Maintenance panel, double-click the Change Orders icon. The system displays the Change Order window’s Header panel.

2. From the Services menu, click Choose Keys. The system displays the Select Contract and Change Order window.

3. In the Contract ID area, scroll to and double-click contract TRN353. The system displays the Header panel with the selected contract and next sequential change order number.

4. In the Description field, type **Additional Traffic Control**.

5. In the Reason Code dropdown list, select Constructability: Traffic Control.

6. In the CO Type dropdown list, select Category 3.

7. Select the Overrun/Underrun check box.

8. Save.
Add an existing contract item to this change order.

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

10. On the toolbar, click the **Select Item** button. The system displays the Select Contract Items window.

11. In the **Contract Items** area, scroll to and double-click the following:

   - Project Nbr: **67004-3213-14**
   - Item Nbr: **0960**
   - Item Code: **607-37.09**
   - Description: **60" CORRUGATED METAL PIPE CULVERT**

12. In the **Quantity** column in the **This Change Order** field, type **170**.

13. **Save**.

14. Click the **Header** tab.

Calculate the change order.

15. From the **Services** menu, click **Calculate Change Order**.

16. **Save**.

17. What is the **CO Amount** for this change order? **_________**.

*You’ve created a new change order to modify an existing contract item.*
Adding New Items to a Contract

Except for TDOT Add-on items, new items may only be added to an active contract through the change order process. When a new item is added to a contract, the user must choose a project number, a category, a line item number, item code, unit price, proposal line number, a supplemental description of the item (if required), and a quantity on the new item.

Tip! The contract item list is updated immediately with the new contract item, but the new contract item has a Pending status type. Upon approval of the change order, the new contract item has an Approved status type and is available to be included on Daily Work Reports.
THE CREATOR OF THE CHANGE ORDER WILL USE A STARTING NUMBER OF 9500 FOR THE LINE ITEM NUMBER OF THE FIRST NEW CONTRACT ITEM. EACH NEW CONTRACT ITEM SUBSEQUENTLY ADDED TO THE CONTRACT IS INCREMENTED BY 1 FROM THAT STARTING POINT BY THE CHANGE ORDER CREATOR. THIS CREATOR SHOULD ENTER THE SAME NUMBER IN THE PROPOSAL LINE NBR FIELD AS THEY ENTERED IN THE LINE ITEM NBR FIELD.

TO DETERMINE THE NEXT AVAILABLE LINE ITEM NUMBER, LOOK AT THE LAST LINE ITEM NUMBER USED ON THE LAST CHANGE ORDER (CHANGE ORDER > CHANGE ORDER ITEMS).

BY DEFAULT, THE MAJOR ITEM BOX IS CHECKED FOR ALL ITEMS BEING ADDED. THE CREATOR SHOULD ALWAYS UNCHECK THIS BOX BECAUSE THE CONTRACT’S MAJOR ITEMS ARE DETERMINED DURING CONTRACT ACTIVATION.

IT IS IMPORTANT TO SELECT THE APPROPRIATE CATEGORY WHEN ADDING ITEMS WITH A CHANGE ORDER. THE TABLE BELOW DEFINES THE VARIOUS CATEGORIES USED BY TDOT. PARTICIPATING CATEGORIES ARE THOSE PAID BY THE NORMAL FUNDING SOURCE FOR THE PROJECT. NON-PARTICIPATING CATEGORIES ARE THOSE PAID BY OTHER FUNDING SOURCES THAN THE NORMAL FUNDING SOURCE FOR THE PROJECT. DESCRIPTIONS OF THE FUNDING SOURCES CAN BE FOUND IN THE CONTRACT FUNDING WINDOW LOCATED AT MAIN PANEL > CONTRACT ADMINISTRATION > CONTRACT RECORDS > CONTRACT FUNDING. CATEGORIES 1100 AND GREATER (ALTERNATE BID ITEMS) SHOULD NOT BE USED TO ADD ITEMS TO A CONTRACT FOR ANY REASON, FOR THESE ARE ONLY USED IN THE BID LETTING. IF THERE ARE ANY QUESTIONS CONCERNING FUNDING OR IF A CATEGORY NEEDS TO BE ADDED, PLEASE CONTACT THE FINANCE OFFICE.

<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 &amp; Other Items</td>
<td>0700</td>
<td>0710 - 0790</td>
</tr>
<tr>
<td>Utility Items</td>
<td>0900</td>
<td>0900 - 0990</td>
</tr>
<tr>
<td>Alternate Bid Items</td>
<td></td>
<td>&gt;1100</td>
</tr>
</tbody>
</table>
Exercise 3

In this exercise, create a change order to add a new item to a contract.

User ID: jj00016  
Password: pass  
Connection: Training Server  
Group Name: FIELD – Operations Office Staff [OSTAFF]  
Prior Keys: TRN353, 001 (change order)

1. On the toolbar, click the New button. The system creates a blank record for a new change order on the contract.

2. In the Description field, type Additional Sign Needed.


4. In the CO Type dropdown list, select Category 3.

5. Select the Extra Work check box.

6. Save.

Associate the items to the change order.

7. Click the Items tab.

8. On the toolbar, click the New button.

9. In the Project Nbr dropdown list, select 67004-3213-14.

10. In the Category Nbr dropdown list, select 0100.

11. In the Line Item Nbr field, type 9500.


13. In the Item Code column, scroll to and click the following:
   
   Item Code: 713-16.07  
   Short Description: END OF ROADWAY SIGN AND SUPPORT.

14. Click OK.

15. Clear the Major Item check box.

16. In the Unit Price field, type 360.00.

17. In the Proposal Line Nbr field, type 9500.
18. In the **Quantity** column in the **This Change Order** field, type **70**.

19. **Save**.

20. Click the **Header** tab.

Associate this change order to a dispute.

21. In the **Reference to** area, in the **Dispute** field, right-click and select **Search**. The system displays the Search Window window.

22. In the **Dispute ID** column, double-click **1**. The system closes the Search Window window and displays the selected dispute number in the field.

23. **Save**.

Calculate the change order.

24. From the **Services** menu, click **Calculate Change Order**.

25. **Save**.

26. What is the CO Amount for this change order? _________.

*You’ve added a new item to an existing change order.*

### Creating Change Order Time Adjustments

Use the Change Order window’s Time Adjustments panel to enter one or more time adjustments for a change order.

![](image)

Figure 6. Change Order Window - Time Adjustments Panel
Record at least one adjustment if the Time Adjustment function is selected on the Header panel.

Time adjustments may be related to the following:

- Contract completion date
- Milestone(s) on the contract
- Both the contract completion date and milestone(s) associated with the contract

The charge type for the contract or milestone determines which timing components of the contract and its associated milestones may be entered and modified.

The three types of charge types are as follows:

- **Completion Date** - Has a specific fixed end date for the contract or for milestones within the contract. Only the completion date field may be entered. The system computes the number of days adjusted.

- **Available Days** - Only the number of days adjusted may be entered on the Time Adjustments panel.

- **Calendar Days** - Computes the end date for the contract and for milestones based on the number of calendar days allocated for the work. The number of days adjusted may be entered. The system then computes the completion date.

TDOT WILL PRIMARILY USE COMPLETION DATE CONTRACTS.

The Time Adjustments panel has the following limits:

- Only one adjustment to the contract completion date may be entered per change order.

- Only one adjustment to each milestone completion date or number of days may be entered per change order. (Time Adjustment Change Orders for milestones are only needed to accommodate changes to mowing and litter cycles, because they are contractual milestones.)

- Text explaining reasons for the time adjustment must be entered.

- The status of the associated change order determines whether the fields on this window are display only or may be modified by the user. Time adjustments may only be entered while a change order is in Draft status. Changes orders in a Pending, Approved, or Denied status do not allow updates to these fields.

THE EXPLANATION IN THE CHANGE ORDER TIME ADJUSTMENTS WINDOW SHOULD ALWAYS BE “SEE CHANGE ORDER EXPLANATIONS WINDOW.”
Exercise 4

In this exercise, create a change order to adjust time on a contract.

User ID: jj00016  
Password: pass  
Connection: Training Server  
Group Name: FIELD – Operations Office Staff [OSTAFF]  
Prior Keys: TRN353, 002 (change order)

1. On the toolbar, click the New button. The system creates a blank record for a new change order on the contract.

2. In the Description field, type Water Utility Pipe Relocation.


4. In the CO Type dropdown list, select Category 3.

5. Select the Time Adjustment check box.

6. Save.

Record the time adjustment information.

7. Click the Time Adjustments tab. The system displays the Time Adjustments panel.

8. In the Adjustment Completion Date field, type 051516.

9. In the Explanation field, type See Change Order Explanations panel.

10. Save.

11. Click the Header tab.

Calculate the change order.

12. From the Services menu, click Calculate Change Order.

13. Save.

14. What is the CO Amount for this change order? _________.

You’ve created a time adjustment.
Applying Explanations

Use the Change Order Explanation window to document the reasons for contract changes. In this window, the author of the change order records the reason for changes in the contract included in the change order. Reviewers and approvers use this window to view change order reasons.

**USE THE EXPLANATION TYPE “GENERAL CHANGE ORDER EXPLANATIONS” FOR ALL THE EXPLANATIONS FOR A CHANGE ORDER.**

When the change order is in Draft status and the window is in New mode, the user may use the lower data window to do the following:

- Display and search the list of standard explanations for this contract type.
- Type a non-standard explanation description in the multi-line text field.

![Change Order Window - Explanations Panel](image)

Figure 7. Change Order Window - Explanations Panel
STANDARD AND NON-STANDARD EXPLANATIONS ARE USED TOGETHER TO FORM THE BODY OF THE PRINTED CHANGE ORDER REPORT. BEFORE TYPING A NON-STANDARD EXPLANATION, THE USERS SHOULD CHECK TO SEE IF STANDARD EXPLANATIONS EXIST FOR THE CHANGE ORDER.

THE STANDARD EXPLANATION IDS HAVE BEEN NAMED TO HELP DETERMINE WHEN AND WHERE TO USE THEM.

IF THE ID ENDS WITH 1, USE BEFORE NON-STANDARD EXPLANATIONS.
IF THE ID ENDS WITH 2, USE AFTER NON-STANDARD EXPLANATIONS.

THE SEQUENCING OF THE EXPLANATIONS IS VERY IMPORTANT BECAUSE THIS DETERMINES THE ORDER IN WHICH THEY ARE PRINTED ON THE CHANGE ORDER REPORT.

USE THE STANDARD EXPLANATIONS AS FOLLOWS:

ITEM1 AND ITEM2 — AT THE BEGINNING AND END OF AN EXPLANATION FOR A CHANGE ORDER ADDING OR MODIFYING CONTRACT ITEMS. INSERT THE REQUIRED NON-STANDARD EXPLANATIONS BETWEEN THEM.

NOTIME — WHEN THERE IS NO TIME EXTENSION ON THE CHANGE ORDER THE ORDER SHOULD BE "ITEM1, NON-STANDARD EXPLANATION, NOTIME, ITEM2.

TIME1 AND TIME2 — USED AT THE BEGINNING AND END OF AN EXPLANATION FOR A CHANGE ORDER MODIFYING CONTRACT TIME. NON-STANDARD EXPLANATIONS ARE REQUIRED BETWEEN THEM.

ITEMTIME1 AND ITEMTIME2 — USED AT THE BEGINNING AND END OF AN EXPLANATION FOR A CHANGE ORDER ADDING OR MODIFYING CONTRACT ITEMS AND TIME. NON-STANDARD EXPLANATIONS ARE REQUIRED BETWEEN THEM.
Exercise 5

In this exercise, add standard explanations and a non-standard explanation to a change order.

User ID: jj00016  
Password: pass  
Connection: Training Server  
Group Name: FIELD – Operations Office Staff [OSTAFF]  
Prior Keys: TRN353, 003 (change order)

1. Click the Explanations tab. The system displays the Explanations panel.

Add a standard explanation.

2. Verify that the default General Change Order Explanations is selected in the dropdown list.

3. On the toolbar, click New.

4. On the Pick Std Exp ID field, right-click and select Search.

5. In the Explanation list box, scroll to and click TIME1.

6. Click OK.

7. Save.

Add a non-standard explanation.

8. On the toolbar, click New.

9. In the lower text field, type Due to an erosion issue at station 100+00 the contractor had to install additional corrugated metal pipe. This required additional traffic control.

10. Save.

Add another standard explanation.


12. On the Pick Std Exp ID field, right-click and select Search.

13. In the Explanation list box, scroll to and click TIME2.

14. Click OK.

15. Save.

16. Close. The system displays the Change Order Maintenance panel.

You’ve added standard explanations and a non-standard explanation.
Viewing the Custom Change Order

The BOE report, *Supplemental Agreement and/or Request for Construction Change*, is a custom TDOT document to gather physical signatures from department officials. It’s important that the report is reviewed for accuracy.

![Figure 9. Change Order – Parameters](image)

Figure 9. Change Order – Parameters
Figure 10. Supplemental Agreement and/or Request for Construction Change Report (initial page)
Supplemental Agreement and/or Request for Construction Change
Change Order No. 981

STATE OF TENNESSEE
Department of Transportation
Bureau of Operations
Nashville, TN 37243-0328

Contract No.: CNP140
Project No.: 6031-3206-44, 6031-3206-44, 6031-3206-44, 6031-3206-44,
6031-3206-44, 6031-3206-44, 6031-3206-44, 6031-3206-44,
6031-3206-44, 6031-3206-44, 6031-3206-44, 6031-3206-44,
Reference No.: HSB-66(10), N/A, NSB-234(10), N/A, HSB-66(10), N/A
County(s): JACKSON, PUTNAM

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<th>ITEM</th>
<th>DESCRIPTION</th>
<th>UNIT</th>
<th>QUANTITY</th>
<th>RATE</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>710-02-03</td>
<td>RADIUS RAIL, Radius Rail</td>
<td>Linear Foot</td>
<td>0.000</td>
<td>12.500</td>
<td>15.625</td>
</tr>
<tr>
<td>712-01-01</td>
<td>ADDITIONAL TRAFFIC CONTROL, Additional Traffic Control</td>
<td></td>
<td>0.000</td>
<td>1.000</td>
<td>7,000.00</td>
</tr>
<tr>
<td>713-02-14</td>
<td>FLEXIBLE DELINEATOR (WHITE)</td>
<td></td>
<td>0.000</td>
<td>300.000</td>
<td>90.000</td>
</tr>
</tbody>
</table>

Bill Contract Amount: $1,050,778.01
Current Change Order: $61,976.95
Pending Change Orders: $10,000
Total Change Orders to Date: $61,976.95

NOW, THEREFORE, the ROGERS GROUP, INC., CONTRACTOR, and TRAVELERS CASUALTY & SURETY COMPANY OF AMERICA, SURETY, hereby agree to the Supplemental Agreement, containing the above mentioned items and prices, and agree that this Supplemental Agreement is hereby made a part of the original contract and will be performed by the Contractor in accordance with specifications thereof, and that the original contract remain in full force and effect, except as specifically modified by the Supplemental Agreement.

RECOMMENDED FOR APPROVAL:

<table>
<thead>
<tr>
<th>DISTRICT SUPERVISOR</th>
<th>DATE</th>
<th>PWY/CERTIFICATION ACCEPTANCE</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>CONTRACTOR</td>
<td></td>
</tr>
</tbody>
</table>

By ___________________________

APPROVED BY:

<table>
<thead>
<tr>
<th>DISTRICT OPERATIONS ENGINEER</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

By ___________________________

Figure 11. Supplemental Agreement and/or Request for Construction Change Report (final page)
Viewing the Change Order Report

The reviewer and/or approver of a change order uses the Change Order Report window as a source of information. This report window displays all the data included on a change order. A second page displays only if there are Time Extensions associated with the change order selected for this report.

Figure 12. Change Order Report
Exercise 6

In this exercise, access and view the Change Order Report.

User ID jj00016 Password pass
Connection Training Server
Group Name FIELD – Operations Office Staff [OSTAFF]
Prior Keys TRN353; 003 (change order)

1. On the SiteManager Panel window, click the Change Orders tab. The system displays the Change Orders panel.

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

3. Double-click the Change Order Report icon. The system displays the Report Criteria window with the Contract and Change Order fields auto-populated with the current keys.

4. To generate the report, click OK.

5. What is the description for this change order? ___________________________

6. What is the Total Value of this change order? __________

7. To close the Change Order Report window, click Close. The system displays the SiteManager Panel window.

Prepare for the next exercise.

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

You’ve viewed the Change Order Report.
Summary

Contract change orders may include:

- Quantity adjustments for existing items
- Adding new items of work to the contract
- Extra work
- Time extension on milestones or revisions to a contract completion date

To access the Change Order window:

1. On the **Main Panel** panel, double-click the **Change Orders** icon.
2. Double-click the **Change Order Maintenance** icon.
3. Double-click the **Change Orders** icon.

To access the Header panel:

1. Open the Change Order window.
2. Click the **Header** tab.

To access the Items panel:

1. Open the Change Order window.
2. Click the **Items** tab.

To access the Time Adjustments panel:

1. Open the Change Order window.
2. Click the **Time Adjustments** tab.

To access the Explanations panel:

1. Open the Change Order window.
2. Click the **Explanations** tab.
To choose keys for a new change order:

1. Open the Change Order window.
2. From the Services menu, select Choose Keys.
3. In the Contract ID area, select the desired contract.
4. Click OK.

To open an existing change order:

1. Access the Header panel.
2. On the toolbar, click Open.
3. In the Contract ID area, scroll to and double-click the desired contract.
4. In the Change Order area, scroll to and select the desired change order.
5. Click OK.

To modify an existing time adjustment to a contract or milestone:

1. Access the Time Adjustments panel for the desired change order.
2. In the top pane, select the desired contract or milestone adjustment choice.
3. If enabled, in the Time Adjustment Days field, type the modified number of days the contract or a milestone is adjusted.
4. If enabled, in the Adjusted Completion Date field, type the modified completion date of the contract or a milestone.
5. Select the for Milestone or the or Contract Completion radio button (ON) to indicate whether this is a modification of a previous milestone or a contract adjustment.
6. Provide an explanation for the new time adjustment, if desired.
7. Save.
To modify an existing contract item:

1. Access the Items panel for the desired change order (with Overrun/Underrun function selected).
2. On the toolbar, click the Select Item button.
3. In the Contract Items area, scroll to and select the desired contract item.
4. Click OK.
5. In the CO Item Description field, type the description for the item change.
6. In the Quantity column, in the This Change Order field, type change order quantity.
7. Save.

To add a new line item from the Item Master List to the contract:

1. Access the Items panel for the desired change order (with Extra Work function selected).
2. Click the Items tab.
3. On the toolbar, click New.
4. In the Project Nbr dropdown, select the desired project.
5. In the Category Nbr dropdown, select the desired category.
6. In the Line Item Nbr field, type the desired number.
7. In the Item Code field, right-click and select Search.
8. In the Item Code column, scroll to and select the desired item code.
9. In the Unit Price field, type the unit price.
10. In Proposal Line Nbr field, type the desired number.
11. In the Quantity column in the This Change Order field, type the desired quantity.
12. Save.
To apply a standard explanation to a change order:

1. Access the **Explanations** panel for the desired change order.
2. On the toolbar, click the **New** button.
3. In the **Pick Std Exp ID** field, right-click and select **Search**.
4. Scroll to and select the desired explanation.
5. Click **OK**.
6. **Save**.

To add a non-standard explanation:

1. Access the **Explanations** panel for the desired change order.
2. On the toolbar, click the **New** button.
3. In the **Enter Text Below** text box, type the desired explanation.
4. **Save**.

To calculate a change order:

1. Open the Change Order Header window for the desired contract and change order.
2. From the **Services** menu, select **Calculate Change Order**.
3. **Save**.
Review Exercise

In this exercise, create a new change order.

User ID: jj00016  Password: pass
Connection: Training Server
Group Name: FIELD – Operations Office Staff [OSTAFF]
Prior Keys: TRN353, 001 (change order)

1. Navigate to the Change Order window.

2. Create a new time adjustment change order for contract TRN350.
   - Description: Extended time due to relocation of water utility.
   - Reason Code: Change Field Conditions: Utilities
   - CO Type: Category 3
   - Function: Time Adjustment
   - Indicate that the new contract completion date is 05/16/17.

3. Create a new change order on contract TRN350.
   - Description: Increased mix and added pavement marking.
   - Reason Code: Scope Change: Design
   - CO Type: Category 3

4. Navigate to the Items panel and change an existing item on the contract.
   - Project Nbr: 67004-3213-14
   - Line Item Nbr: 0800
   - Quantity for this change order: 500
5. Add a new item to the contract.
   - Project Nbr: 67004-3213-14
   - Category Nbr: 0100
   - Line Item Nbr: 9501
   - Item Code: 716-11.01
   - Unit Price: $5600.00
   - Proposal Line Nbr: 9501
   - Quantity for this change order: 3

6. **Calculate** the change order on the **Header** panel.
   - What is the CO Amount? ________

7. Apply standard explanation **ITEM1**, then a non-standard explanation of your choice (type it in), then the standard explanation **ITEM2**.

8. **Exit SiteManager**.
Understanding Change Orders for Office Documentation (Part 2)

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

- Forwarding a Change Order for Review
- Sending a Change Order for Approval
- Replacing Approvers
- Reviewing and Approving Change Orders
- Tracking Change Orders
- Summary
- Review Exercise
Forwarding a Change Order for Review

Prior to beginning the approval process, the change order author may forward the change order for review while it is still in Draft status.

- Using the Services menu’s Forward To choice, select the designated reviewers. The draft Change Order may be accessed and reviewed by multiple users concurrently. (This review may be eliminated and the Status changed to Pending at any time to begin the approval process.)

- Reviewers record their comments using the Change Order Review/Approve window.

- At any time during the process, reviews may be viewed on-line using the Change Order Tracking window.

![Change Order #< > Review Window](image)

Figure 1. Change Order #< > Review Window
Exercise 1

In this exercise, forward a change order for review.

User ID jj00016 Password pass
Connection Training Server
Group Name FIELD – Operations Office Staff [OSTAFF]

1. Start and log onto SiteManager as user jj00016 while connected in server mode.

2. On the Main Panel, double-click the Change Orders icon. The system displays the Change Orders panel.

3. Double-click the Change Order Maintenance icon. The system displays the Change Order Maintenance panel.

4. Double-click the Change Orders icon.

Select the desired change order to review.

5. On the toolbar, click the Open button. The system displays the Select Contract and Change Order window.

6. In the Contract ID area, in the Contract ID column, scroll and double-click TRN355.

7. In the Change Order area, in the CO Nbr column, scroll to and click 001.

8. Click the OK button. The system displays the Header panel.

Forward the selected change order for review.

9. On the Services menu, select the Forward To choice. The system displays the Change Order #< > Review window.

Select the group and reviewer.

10. In the Groups for Review pane, select Departmental.

11. In the lower left pane, select jj00014 Simmons, Paul.

12. Click the Add button.

13. Click the OK button. The system closes the window and displays the Header panel.

14. Save. The system displays a message to inform you that mail has been sent.
15. In the message, click **OK**.

*Now that you’ve forwarded the change order for review, reviewers may use either the custom BOE or the SiteManager system Change Order report.*

**Sending a Change Order for Approval**

For the change order to be approved, it must be placed in Pending status on the Change Order window’s Header panel and sent for approval.

![Change Order Window - Header Panel](image)

The following facilitates the approval process:

1. When the change order is changed to Pending status and saved, the user is prompted to submit the Change Order for approval using the Change Order Approval window.

2. Approvers record their decisions using the Change Order Review / Approval window.

3. At any time during the review and approval process, reviews and approvals may be viewed on-line using the Change Order Tracking window.

4. If an approver selects “denied” in the review/approve window, they must document the reason for denial in the Remarks field including whether corrections are needed or if this CO is permanently denied. If corrections are needed, the creator should change the status back to draft, make corrections, and change it to pending to submit it for approval again.

5. If an approver selects “denied” in the review/approve window and provides a remark explaining why the Change Order will never be approved, the creator should change the status of the Change Order to Denied in the Header window. **BEWARE:** A Change Order in Denied Status may not be changed to Draft or Pending.
To provide full tracking, change order approval levels are set up in SiteManager based on the department’s latest change order policy.

<table>
<thead>
<tr>
<th>Category</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
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</tr>
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<tbody>
<tr>
<td>Contractor</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
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<td>✓</td>
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</tr>
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<td>✓</td>
<td>✓</td>
<td>Regional Designated Representative</td>
</tr>
<tr>
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<td>✓</td>
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<td>✓</td>
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</tr>
<tr>
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<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Director of Construction / Asst. Director of Construction</td>
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<td></td>
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<td>HQ Construction Representative</td>
</tr>
<tr>
<td>Commissioner</td>
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<td>HQ Construction Representative</td>
</tr>
<tr>
<td>HQ FHWA CO Rep, as applicable</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>HQ Finance Representative</td>
</tr>
</tbody>
</table>

✓ Approval level required in SiteManager
✓ Approval level required in SiteManager and signature required on printed form
Note: The Finance Office will be added automatically once the Pending change order is saved.
CIRCUMSTANCES WHERE THE CHANGE ORDER IS TO BE LEFT IN DRAFT STATUS (NEVER SET TO PENDING) ON THE CHANGE ORDER HEADER WINDOW INCLUDE THE FOLLOWING:

**CO TYPE** - “TIME ADJUSTMENT DUE TO QUANTITY INCREASE” WHICH IS USED IN THE FINAL ESTIMATE PROCESS. THIS TYPE OF CHANGE ORDER DOES NOT REQUIRE A SIGNED CHANGE ORDER.

**CO FUNCTIONS** - “ZERO DOLLAR” WHICH ARE USED FOR THINGS LIKE ADDING SPECIAL PROVISIONS. THIS CHANGE ORDER FUNCTION WILL REQUIRE A SIGNED CHANGE ORDER.

THESE SHOULD BE LEFT IN DRAFT STATUS BY THE OFFICE STAFF AND THEY SHOULD NOTIFY THE FINANCE OFFICE WHEN THE CHANGE ORDERS ARE COMPLETE. THE FINANCE OFFICE WILL OVERRIDE THE APPROVAL RULES, CHANGE THE STATUS TO PENDING, AND APPROVE THE CHANGE ORDER.

---

**Exercise 2**

In this exercise, send a change order for approval.

User ID         jj00016   Password    pass
Connection      Training Server
Group Name      FIELD – Operations Office Staff [OSTAFF]
Prior Keys      TRN355

1. On the toolbar, click **Open**. The system displays the Select Contract and Change Order window.
2. In the **CO Nbr** column, double-click **002**.
3. In the **Status** dropdown list, select **Pending**.
4. **Save**. The system displays a message confirming the status change to Pending.
5. In the message, click **Yes**. The system displays the Change Order #< > Approval window.

Add a group for approval.

6. In the **Groups for Approval** area, select **Contractor**.
7. In the lower left pane, select **jj00024 Burton, Mike**.
8. Click **Add**.

---

THIS IS THE REGIONAL DESIGNATED REPRESENTATIVE.
Add a second group for approval.

9. In the **Groups for Approval** area,
   select **FIELD – District Operations Specialist**.

10. In the lower left pane, select **jj00021 Post, Craig**.

11. Click **Add**.

Add a third group for approval.

12. In the **Groups for Approval** area,
    select **FIELD – District Operations Supervisor**.

13. In the lower left pane, select **jj00019 Hill, Tracy**.

14. Click **Add**.

Add a fourth group for approval.

15. In the **Groups for Approval** area,
    select **FIELD – District Operations Engineer**.

16. In the lower left pane, select **jj00023 Callaway, Sherri**.

17. Click **Add**.

Send the notification.

18. Click **OK**. The system displays a message to inform you that mail has been sent.

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

20. **Save**.

21. **Exit SiteManager**.

*Now that you have forwarded the change order for review, the reviewers may use the internal SiteManager Change Order report or the custom BOE Change Order report.*
Replacing Approvers

Exercise 3

In this exercise, replace an approver after a change order has been sent for approval.

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

1. Start and log onto SiteManager as user jj00019 while connected in server mode.
2. On the Main Panel, double-click the Change Orders icon. The system displays the Change Orders panel.
3. Double-click the Change Order Maintenance icon. The system displays the Change Order Maintenance panel.
4. Double-click the Change Orders icon.

Select the desired change order.

5. On the toolbar, click the Open button. The system displays the Select Contract and Change Order window.
6. In the Contract ID area, in the Contract ID column, scroll and double-click TRN355.
7. In the Change Order area, in the CO Nbr column, scroll to and click 002.
8. Click the OK button. The system displays the Header panel.

Open the window where the approver can be changed.

9. From the Services menu, select the Forward To choice. SiteManager displays the Change Order #002 Approval window.
10. In the Groups for Approval pane, select the District Operations Specialist group.

CAUTION!

UPON CHANGING THE FIRST-LEVEL APPROVER, THE SYSTEM DOES NOT SEND AN IN-BOX NOTIFICATION TO THE NEW FIRST-LEVEL APPROVER.
Remove the incorrect approver.

11. In the right pane, notice the incorrect approver’s name.
12. Click **Remove**.

Add the correct approver.

13. In the left pane, select **jj00022 Holden, Berry**.
14. Click **Add**.
15. Click **OK**.
16. **Save**.
17. **Exit SiteManager**.

*You’ve replaced an incorrect change order approver.*
Reviewing and Approving Change Orders

The Change Order Review/Approve icon allows the user who receives an In-Box message to review a draft change order or to approve a pending change order.

The Review/Approve window allows the user to:

- Access the change order information
- View the contract and change order information on-line
- Document their recommendation to approve or deny the Draft or Pending Change Order
- Record Remarks related to their recommendation. Remarks are optional.

Figure 4. In-Box Window

Figure 5. Read / Forward / Compose Mail Window (First-Level Approver)

Figure 6. Read / Forward / Compose Mail Window (Subsequent-Level Approver)
Exercise 4

In this exercise, approve a change order.

User ID: jj00024  Password: pass
Connection: Training Server
Group Name: REG - Contractor/Surety/Local Rep [CONT]

1. Start and log onto SiteManager as user \textit{jj00024} while connected in server mode.

   Open the Inbox and see if you’ve received a Pending Change Order to approve.

2. On the \textbf{Main Panel}, double-click the \textbf{Accessories} icon. The system displays the Accessories panel.

3. Double-click the \textbf{In-Box} icon. The system displays the In-Box window.

4. Double-click the message titled \textbf{Forward Change Order}.

5. Is there a request to approve change order \textit{002} on contract \textit{TRN355}? __________

6. To close the Read / Forward / Compose Mail window, click \textbf{Close}. The system displays the In-Box window.

7. To close the In-Box window, click \textbf{Close}. The system displays the SiteManager Panel window.

8. Click the \textbf{Main Panel} tab. The system displays the Main Panel panel.
Open the Change Order Approval window.

9. Double-click the Change Orders icon. The system displays the Change orders panel.

10. Double-click the Change Order Maintenance icon. The system displays the Change Order Maintenance panel.

11. Double-click the Change Order Review / Approve icon. The system displays the Change Order Review / Approval window.

12. In the Contract ID area, double-click TRN355.

13. In the Change Orders area, double-click 002. The system displays the Change Order Approval window.

Review the details of the change order.

14. From the Services menu, select the Change Order option. The system displays the Change Order window.

15. Review the change order details.

16. Click the Items tab. The system displays the Items panel.

17. Review the item details.

18. To close the Change Order window, click Close. The system displays the Change Order Approval window.

Approve the change order for the first approval group.

19. In the Recommendation area, click the Approved button.

20. Save. The system displays a message that requests you to confirm the recommendation.

21. In the message, click Yes. The system displays a message to inform you that the mail has been sent.

22. In the message, click OK.

23. To close the Change Order Approval window, click the Close button. The system displays the Change Order Maintenance panel.

You’ve reviewed the change order and approved it for the first approval group.
Tracking Change Orders

The status of a Change Order in the review or approval cycle can be monitored by opening the Tracking window at any time. The Tracking window for a Change Order is a view-only window and displays the following information:

- Date a request for recommendation was sent to a reviewer or approver
- Reviewer or approver’s name
- Action requested - review or approve
- Date the reviewer or approver made a recommendation
- Recommendation - Approved or Denied
- Any Remarks the reviewer or approver has made

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

![Figure 8. Change Order Tracking Window](image)
Exercise 5

In this exercise, view the tracking window.

User ID jj00024 Password pass
Connection Training Server
Group Name REG - Contractor/Surety/Local Rep [CONT]
Prior Keys TRN355

1. On the Change Order Maintenance panel, double-click the Tracking icon. The system displays the Tracking window.

2. On the Tracking window, click the CO Tracking List tab.

3. Who is the next person to approve the change order? __________

4. To close the Tracking window, click Close.

5. Exit SiteManager.

You’ve viewed the Tracking window.
Summary

To access the Change Order Maintenance panel:

1. On the Main Panel, double-click the Change Orders icon.
2. On the Change Orders panel, double-click the Change Order Maintenance icon. The system displays the Change Order Maintenance panel.

To forward a Draft change order for review:

1. On the Change Order Maintenance panel, double-click the Change Orders icon.
2. From the Services menu, select Open.
3. Select a Draft change order.
4. From the Services menu, click the Forward To choice. The system displays the Change Order Review window.
5. In the Groups for Review area, click a desired choice.
6. In the left pane, scroll to and select the desired user name and user ID.
7. Click Add.
8. Repeat for all desired groups.
9. Click OK.

To change a Draft change order to Pending and send for approval:

1. On a Draft change order, in the Status dropdown list, select Pending.
2. Save. The system displays a message prompting you to confirm.
3. Click Yes. The system displays the Change Order #< > Approval window.
4. In the Groups for Approval area, click the desired choice.
5. In the left pane, scroll to and select the desired user name and user ID.
6. Click Add.
7. Repeat for all desired groups.
8. Click OK.
To replace an approver after a change order has been sent for approval:

1. From the Services menu, select the Forward To choice. SiteManager displays the Change Order < > Approval window.
2. In the Groups for Approval pane, select the group to be changed.
3. Click Remove.
4. In the left pane, select the desired approver.
5. Click Add.
6. Repeat steps 3-6 as necessary.
7. Click OK.

To review or approve a change order:

1. On the Change Order Maintenance panel, double-click the Change Order Review/Approve icon.
2. Open a Draft change order that has been forwarded for review or a Pending change order that has been sent for approval.
3. Click the Approved or Denied button.
4. Save.

To track the status of a change order:

1. On the Change Order Maintenance panel, double-click the Tracking icon.
   - or -
   From the Services menu, select Change Order Tracking.
2. Open a desired change order.
Review Exercise

In this exercise, send a change order for approval and grant first-level approval.

User ID: jj00016  Password: pass
Connection: Training Server
Group Name: FIELD – Operations Office Staff [OSTAFF]

1. Start and log onto SiteManager as user jj00016 while connected in server mode.

2. Navigate to the Change Orders window.

3. Open change order 004 for contract TRN355.

4. Change its status to Pending.

5. Send the change order for approval to the following personnel:
   - Contractor: jj00024 Burton, Mike
   - Field – District Operations Specialist: jj00022 Holden, Berry
   - Field – District Operations Supervisor: jj00019 Hill, Tracy
   - Field – District Operations Engineer: jj00023 Callaway, Sherri

6. Navigate to Tracking window.

7. Who is the first person responsible for approving change order 004 on contract TRN355? ____________

8. Exit SiteManager.

9. Start and log onto SiteManager as user jj00024 while connected in server mode.

10. Navigate to the Change Order Review/Approval window.

11. Recommend that change order 004 on contract TRN355 be approved.

12. Exit SiteManager.

You’ve sent a change order for approval and granted first-level approval.
Finalizing Contracts for Office Documentation

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

- Overview of the Contract Finalization Process 2
- Updating Key Dates 4
- Creating a Document Submission of the Final Estimate 7
- Reviewing and Resolving Estimate Discrepancies 12
- Viewing the Change Order 14
- Generating the Final Estimate 16
- Approving a Final Estimate 18
- Summary 22
- Review Exercise 25
Overview of the Contract Finalization Process

Once a project is complete, the final inspection has been held and any punch-list items are finished, the responsible Operations Staff will complete a full review of all project documentation to ensure accuracy and completeness.

Final Estimate Requirements

Final estimates differ from other estimates in that:

- There may only be one final estimate per contract.
- Final estimate discrepancies cannot be overridden—they must be resolved before the final estimate may be approved.

Final estimate discrepancies may include the following:

- Checklist Events incomplete
- Item overruns
- Contract Completion date missed
- Milestone Completion date missed

For final estimates, SiteManager performs the same edits, validations, and calculations as for progress estimates.

TDOT Final Estimate Workflow

A. Pre-Final Estimate Process –

A temporary PROGRESS (Pre-Final) estimate will be generated to review work item quantities and to determine discrepancies to be resolved. Once all discrepancies have been resolved, the temporary PROGRESS (Pre-Final) estimate will be deleted and regenerated as a FINAL estimate.

1. Review project records. As needed, correct quantities using the Quantity Correction plug-in, address any applicable change orders that need to be placed in “Denied” status and make sure that all stockpiled items have been depleted.

2. Generate a PROGRESS (Pre-Final) estimate.

3. Resolve all estimate discrepancies. (Note: Only time and item overrun discrepancies can be left unresolved in this step. These will be addressed in Sections B and C.)

4. Run the Price Adjustment plug-in to add line item adjustments to the estimate. Confirm that all applicable Adjustment Calculation Messages have been resolved.

5. Enter any applicable Key Dates.
6. Send the “Final Estimate Review” Document Submission to Final Records and Materials and Test for their approval.

7. Make any necessary modifications based on the review by Final Records and Materials & Tests.

8. Repeat steps 1-7 as needed until everyone approves the final quantities.

9. View Estimate Discrepancies for the pending estimate. (See previous page for list.)

10. If there are no discrepancies for the pending estimate, skip Sections B and C and go to Section D. If there is a Time Discrepancy, proceed to Section B. If there is an Item Overrun discrepancy, proceed to Section C.

**B. Resolving Time Overrun Discrepancy –**

This section only applies if the discrepancies for the pending estimate include “Exceeded Adj Compl Date” and “No Physical Work Complete Date.” Headquarters Finance Office will remove the time overrun discrepancy at the end of this process. If this section does not apply, go to Section C.

1. Run the SiteManager Item Work Report to determine the Inspector Name & DWR Date of the DWRs that contain the calculations for assessment of LD.

2. If the contractor is due extra days due to overrun of quantities, create a Time Adjustment Change Order (CO type “Time Adjustment Due to Quantity Increase”) to extend the time as calculated by the Liquidated Damage Template. List the Inspector Name and DWR Date of the Liquidated Damages DWR as the Change Order Explanation. Leave the Change Order in “DRAFT” status and notify the Finance Office of the Change Order. Finance Office will override approval and approve the Change Order.

   OR

If the contractor is not due extra days due to overrun of quantities email Finance Office the Contract ID, Inspector Name, and DWR Date of the Liquidated Damages DWR.

3. Headquarters Finance Office will notify Office Staff that the discrepancy has been removed.
C. Resolving Item Overrun Discrepancy –

If there is an Item Overrun Discrepancy, contract your Regional Support person.

D. Final Estimate Generation Process –

There can only be one final estimate per contract. All discrepancies will be resolved by the time the FINAL estimate is generated. Final estimate discrepancies cannot be overridden.

1. Generate the Final Estimate.

2. Run Price Adjustment plug-in to add line item adjustments.

3. District Supervisor approve Final Estimate.

4. Notify Final Records via Document Submission that the Final Estimate is ready for Regional approval.

Updating Key Dates

The user creates the Key Date schedule and the user records the actual occurrence of Key Dates associated with Contract Finalization.

Figure 1. Key Dates Window
<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 designee</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>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>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>
</tbody>
</table>

Table 1. TDOT Default Key Dates Associated to Contract Finalization
Exercise 1

In this exercise, log in and enter key dates for a contract.

User ID                jj00032    Password    pass
Connection            Training Server
Group Name           FIELD – Office Staff [OSTAFF]

1. Start and log onto SiteManager as user jj00032 while connected in server mode.

Open the Key Dates window.

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

3. Double-click the Contract Records icon. The system displays the Contract Records panel.

4. Double-click the Key Dates icon. The system displays the Select Contract window.

5. In the Contract ID column, scroll to and double-click TRN370e. The system displays the Key Dates window.

Record an actual date for a key date on a contract.

6. In the Key Date Type column, scroll to and select CC-3.

7. In the Actual Date field, type 030216.

8. Save.

9. Close. The system displays the Contract Records panel.

You’ve opened the Key Dates window and recorded an actual date.
Creating a Document Submission of the Final Estimate

The Document Submission panel lets the user track documents that have been submitted for approval or resolution. The user can enter or view the document type, the document category, the submission date, the submitter’s name, and a document description. The user can modify or delete a record only if there are no reviewers assigned to the document.

To begin the document review process, the user selects one or more reviewers. The reviewer receives an In-Box notification that the document is ready for review. After reviewing the document, the reviewer records his recommendation on the Review Submitted Document panel. A recommendation cannot be modified after it is saved, but a reviewer can add another recommendation. A new tracking record is created for every new recommendation. The user can track the document reviews in the bottom pane of the Document Submission panel.

Figure 2. Document Submission Window (Before Review)

THE DOCUMENT SUBMISSION WINDOW IS USED TO NOTIFY FINAL RECORDS AND MATERIALS & TESTS TO BEGIN THEIR REVIEW OF THE FINAL SUMMARY TO CONTRACTOR REPORT. IF CHANGES ARE NEEDED, FINAL RECORDS AND/OR M&T WILL DENY THE DOCUMENT SUBMISSION AND REQUEST CHANGES BE MADE BY OFFICE STAFF.
Exercise 2

In this exercise, add a document submission record and forward it for review.

User ID jj00032 Password pass
Connection Training Server
Group Name FIELD – Office Staff [OSTAFF]
Prior Keys TRN370e

1. On the SiteManager Panel window, click the **Contract Administration** tab. The system displays the Contract Administration panel.

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

Create a Document Submission record.

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

4. In the **Submitted By** field, type **Sandy Star**.

5. In the **On** field, type **030216**.

6. In the **Document Type** dropdown list, select **14. N/A**.

7. In the **Document Category** dropdown list, select **1. Final Estimate Review**.

8. In the **Description** field, type **Review the Estimate Summary to Contractor report**.

9. Save.
Forward for review.

10. From the Services menu, select Forward To. The system displays the Forward to Selected Users window.

11. In the User Name column, scroll to and select Sands, Jane (jj00033).

12. Click OK.

13. Save. The system displays a message to inform you that the mail has been sent.

14. In the message, click OK. In the lower pane, the system displays each reviewer with a ‘Pending’ recommendation.

Prepare for the next exercise.

15. Exit SiteManager.

You’ve opened the Document Submission window, created a record and forwarded it for review.
Adding Document Reviews

The Document Submission Review panel lets the user enter recommendations for a submitted document. To access this panel, the user must be one of the reviewers assigned to review the document.

The top pane displays the document type, document category, submission date, name of the submitter, and document description. The reviewer adds a recommendation in the bottom pane. The three valid choices are Approved, Approved as Noted, and Denied. The reviewer can add comments in the Remarks field. A recommendation cannot be changed or deleted after it is saved, but the reviewer can add another recommendation. A new record is created for each new recommendation.

Figure 3. Document Submission Review Window

Figure 4. Document Submission Window (After Review)
Exercise 3

In this exercise, add a review record for a submitted document for a contract.

User ID jj00033 Password pass
Connection Training Server
Group Name REG - M&T Final Records [MTFINREC]

1. Start and log onto SiteManager as user jj00033 while connected in server mode.

View the documents submitted for review for a contract.

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

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


5. In the Contract ID area, scroll to and double-click TRN370e.

Add a review record.

6. In the Documents Submitted area, scroll to and double-click the document submitted by Sandy Star on 20160302. The system displays the Document Submission Review window.

7. In the Recommendation area, click the Approved button.

8. In the Remarks field, type Complete.

9. Save. The system makes the record inquiry-only.


View the tracking of the record.


12. Note the tracking of the reviewer, review date, recommendation and remarks.
Prepare for the next exercise.

13. Exit SiteManager.

You’ve reviewed a document submission record.

Reviewing and Resolving Estimate Discrepancies

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

When the Recalculate Discrepancies function is selected from the Services menu, or if the Estimate is regenerated, the discrepancies are re-determined.

**Figure 5. Estimate Discrepancies Window**

**Figure 6. Navigate Button**

<table>
<thead>
<tr>
<th>Description</th>
<th>Status</th>
<th>By</th>
<th>Resolve Date</th>
<th>Resolve Time</th>
</tr>
</thead>
</table>

**ALL DISCREPANCIES MUST BE RESOLVED PRIOR TO GENERATING THE FINAL ESTIMATE. DISCREPANCIES ON THE FINAL ESTIMATE MAY NOT BE OVERRIDDEN. HEADQUARTER FINANCE OFFICE WILL REMOVE THE TIME OVERRUN DISCREPANCY UPON REVIEW OF THE LIQUIDATED DAMAGES DWR TEMPLATE.**
Exercise 4

In this exercise, review an estimate discrepancy on an estimate for a contract.

User ID jj00032 Password pass
Connection Training Server
Group Name FIELD – Office Staff [OSTAFF]

1. Start and log onto SiteManager as user jj00032 while connected in server mode.

Open the Estimate Discrepancies window.

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

3. Double-click the Estimates icon. The system displays the Estimate panel.

4. Double-click the Estimate Discrepancy icon. The system displays the Select Contract and Estimate window.

5. In the Contract area, in the Contract ID column, scroll to and double-click TRN370e.

6. In the Estimate area, in the Estimate Number column, double-click 0002. The system displays the Estimate Discrepancies window.

7. Are there any discrepancies on this estimate? ____________

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

Prepare for the next exercise.

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

You’ve opened the Estimate Discrepancies window.
Viewing the Change Order

The Change Order window allows an authorized user to do the following:

- Create a new change order by entering new descriptive information for a change order, or
- Maintain the current descriptive information about an existing change order as the status of the change order progresses from Draft through Pending to Approved or Denied.

Figure 7. Change Order Window

IF TIME NEEDS TO BE ADDED DUE TO QUANTITY OVERRUNS, OFFICE STAFF WILL CREATE A TIME ADJUSTMENT CHANGE ORDER OF TYPE "TIME ADJUSTMENT DUE TO QUANTITY INCREASE."

CHANGE ORDER OF TYPE "TIME ADJUSTMENT DUE TO QUANTITY INCREASE" IS USED IN THE FINAL ESTIMATE PROCESS AND IS LEFT IN DRAFT STATUS BY THE OFFICE STAFF.

THE OFFICE STAFF SHOULD NOTIFY THE FINANCE OFFICE WHEN THIS TYPE OF DRAFT CHANGE ORDER IS COMPLETE. THE FINANCE OFFICE WILL OVERRIDE THE APPROVAL RULES, CHANGE THE STATUS TO PENDING, AND APPROVE THE CHANGE ORDER. THIS TYPE OF CHANGE ORDER DOES NOT REQUIRE A SIGNED CHANGE ORDER.
Exercise 5

In this exercise, view a Final Estimate change order.

User ID jj00032
Password pass
Connection Training Server
Group Name FIELD – Office Staff [OSTAFF]
Prior Keys TRN370e

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

2. Double-click the Change Order Maintenance icon. The system displays the Change Order Maintenance panel.

3. Double-click the Change Orders icon. The system displays the Change Order window for the current contract.

4. On the toolbar, click the Open button. The system displays a message prompting you to save changes.

5. Since there is no need for a new change order, click the No button. The system displays the Select Contract and Change Order window.

6. In the Change Order area, double-click change order 001.

7. What type of change order is this? ________________________

8. View the Header and Time Adjustments panels.

Prepare for the next exercise.

9. Close. The system closes the Change Order window and displays the Change Order Maintenance panel.

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

You’ve viewed a Final Estimate change order.
Generating the Final Estimate

To generate a final estimate, the user selects the Final type on the Generate Estimate panel. The estimate period start date defaults to the day after the end date of the previous progress estimate, and the estimate period end date defaults to the current date. The estimate can be reviewed on the Estimate Summary panel.

THE END DATE FOR THE FINAL ESTIMATE PERIOD SHOULD BE THE DEFAULTED CURRENT DATE FOR THE FINAL ESTIMATE TO INCLUDE ALL AUTHORIZED DWRS. THE END DATE FOR THE FINAL ESTIMATE CAN BE THE SAME AS THE BEGIN DATE.
Exercise 6

In this exercise, generate a final estimate.

User ID jj00032 Password pass
Connection Training Server
Group Name FIELD – Office Staff [OSTAFF]
Prior Keys TRN370e

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

2. Double-click the Estimate icon. The system displays the Estimate panel.

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

4. In the Contract area, in the Contract ID column, scroll to and double-click TRN370e.

Generate the final estimate.

5. In the Type area, click the Final button.

6. On the toolbar, click the Generate Estimate button. The system displays a message to confirm deletion of the existing estimate.

7. In the message, click Yes. The system displays a message to inform you that the process has been submitted.

8. In the message, click OK.

9. Close. The system closed the Generate Estimate window and displayed the Estimate panel.

Typically, you would now follow TDOT workflow to ensure the estimate quantities are correct. Run the Price Adjustments Program. These skills are included in the Estimates chapter of this training guide.

IF YOU GET AN ERROR MESSAGE, DO NOT RECONNECT TO THE SERVER. CLICK NO THEN CLICK OK.
Approving a Final Estimate

The system allows the user to approve final estimates if all discrepancies have been resolved.

Figure 9. Estimate Approval Window

THE ADJUSTMENTS PLUG-IN WILL APPLY THE ESTIMATE APPROVAL FOR THE OFFICE STAFF LEVEL ON THE ESTIMATE. THE PLUG-IN WILL ALSO BE USED TO RETURN THE ESTIMATE TO PENDING STATUS IF THE ESTIMATE NEEDS TO BE MODIFIED OR DELETED.

ONCE A FINAL ESTIMATE IS PAID, THE USER MAY NO LONGER RECORD WORK AGAINST THE CONTRACT DAILY WORK REPORT (DWR).
Exercise 7

In this exercise, give approval for the first-level reviewer for the final estimate for a contract.

Note: This is only necessary in training. The Price Adjustment plug-in has not been set up to work in training.

User ID       jj00032       Password  pass
Connection    Training Server
Group Name    FIELD – Office Staff [OSTAFF]
Prior Keys    TRN370e

1. Double-click the Estimate Approval icon. The system displays the Select Contract/Estimate window.

2. In the Contract area, In the Contract ID column, scroll to and double-click TRN370e. The system displays the Estimate Approve window.

Give the first-level approval.

3. For the Office Staff level, select the Approved check box.

4. Save.

Prepare for the next exercise.

5. Close. The system displays a message to inform that notification was sent to the District Supervisor.

6. In the message, click OK. The system closes the Estimate Approve window and displays the Estimate panel.

7. Exit SiteManager.

You’ve given first-level approval.
Exercise 8

In this exercise, log on as the highest-level reviewer and approve the final estimate (skipping the second reviewer).

User ID jj00034 Password pass
Connection Training Server
Group Name HQ - Director of Construction [DIRCON]

1. Start and log onto SiteManager as user jj00034 while connected in server mode.

Open the Estimate Approve window.

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

3. Double-click the Estimate icon. The system displays the Estimate panel.

4. Double-click the Estimate Approval icon. The system displays the Select Contract/Estimate window.

5. In the Contract area, in the Contract ID column, scroll to and double-click TRN370e.
Give the second-level approval.

6. For the **District Supervisor**, select the **Approved** checkbox.

Give the third-level approval.

7. For the **Regional Director Rep.**, select the **Approved** checkbox.

Give the fourth-level approval.

8. For the **Finance Staff**, select the **Approved** checkbox.

Give the fifth- and final-level approval.

9. For the **Director of Construction**, select the **Approved** checkbox.

10. **Save.** The system displays a message to inform that the process has been submitted.

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

Prepare for the next exercise.

12. **Exit SiteManager.**

   *You’ve given final approval for the final estimate.*
Summary

To update key dates:

1. On the **Contract Records** panel, double-click the **Key Dates** icon.
2. In the **Actual Date** field, type the date the key date event was completed.
3. **Save**.

To add a document submission record:

1. On the **Contractor Management** panel, double-click the **Document Submission** icon.
2. From the **Services** menu, select **Choose Keys**.
3. In the **Contract ID** column, scroll to and double-click the desired contract.
4. In the **Submitted By** field, type the name of the person submitting the document.
5. In the **On** field, type the date on which the document was submitted.
6. In the **Document Type** dropdown list, select the desired document type.
7. In the **Document Category** dropdown list, select the desired document category.
8. In the **Description** field, type a description of the document.
9. **Save**.

To assign a document reviewer:

1. On the **Contractor Management** panel, double-click the **Document Submission** icon.
2. Click the **Open** button. The system displays the Document Submitted Select window.
3. In the **Select Contract** area, in the **Contract ID** column, scroll to and double-click the desired contract ID.
4. In the **Documents Submitted** area, scroll to and click the document.

5. Click **OK**.

6. From the **Services** menu, select **Forward To**.

7. In the **Forward to Selected Users** area, scroll to and click the reviewer.

8. Click **OK**. The system displays a message to inform that mail has been sent.

9. Click **OK**.

10. To select another reviewer, repeat Steps 6 through 9.

11. **Save**. The system displays each reviewer in the bottom pane with a ‘Pending’ recommendation.

To review a submitted document:

1. Receive notification by In-Box message that the document is ready for review.

2. Review the document, which could be either hard copy or soft copy.

3. On the **Contractor Management** panel, double-click the **Document Submission Review** icon. The system displays the Documents Submitted Select window.

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

5. In the **Submitted Document** area, scroll to and click the document.

6. Click **OK**. The system displays information about the submitted document in the Document Submission Review panel.

7. In the **Recommendation** area, click the **Approved, Approved As Noted**, or **Denied** button.

8. In the **Remarks** field, type comments to add to the review.

9. **Save**.

10. To add another review, click the **New** button and repeat Steps 7 through 9.
To generate a final estimate:

1. On the **Estimate** panel, double-click the **Generate Estimate** icon.
2. Scroll to and click the desired contract.
3. Click **OK**.
4. Click the **Final** button.
5. On the calendar, click the end date if desired.
6. Click the **Generate Estimate** button.
7. Click **OK**.

To view the estimate discrepancies:

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon.
2. On the **Select Contract and Estimate** window, scroll to and double-click the desired contract and the desired estimate.
3. Click **OK**. The system displays the Estimate Discrepancies window.

To approve an estimate:

1. On the **Estimate** panel, double-click the **Estimate Approval** icon.
2. Scroll to and double-click the desired contract and the desired estimate.
3. Select the **Approved** check box for your level.
4. Click **OK**.
5. **Save**.
Review Exercise

In this exercise, review the steps in the Contract Finalization process.

User ID jj00032 Password pass
Connection Training Server
Group Name FIELD – Office Staff [OSTAFF]

1. Start and log onto SiteManager as user jj00032 while connected in server mode.

2. Navigate to the Key Dates window for contract TRN370f.

3. What is the actual date of the Final Inspection?


5. Create a Document Submission record for contract TRN370f. Be creative in completing the fields.

6. Navigate to the window used to generate a final estimate for TRN370f.

7. What is the name of this window?

8. In what ways do Final estimates differ from regular Progress estimates?


10. What is the status of the Final estimate for contract TRN370e?

11. Exit SiteManager.
Preparing for and Generating Supplemental Estimates for Office Documentation

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

- TDOT Supplemental Estimate Workflow 2
- Creating a Document Submission of the Supplemental Estimate 3
- Adding Document Reviews 6
- Viewing Document Submission Recommendations 9
- Generate a Supplemental Estimate 11
- Summary 13
- Review Exercise 16
TDOT Supplemental Estimate Workflow


4. Generate a Supplemental Estimate for the necessary lump sum payment amount. Supplemental Estimates can only be done AFTER a Final Estimate has been paid.

AFTER THE FINAL ESTIMATE HAS BEEN PAID, SUPPLEMENTAL ESTIMATES MAY BE GENERATED TO MAKE LUMP SUM PAYMENTS FOR A SPECIFIC AMOUNT. THERE IS NO LIMIT TO THE NUMBER OF SUPPLEMENTAL ESTIMATES THAT MAY BE GENERATED IN SITEMANAGER.

OFFICE STAFF MUST DOCUMENT THE REASON FOR THE SUPPLEMENTAL ESTIMATE IN THE DESCRIPTION FIELD OF THE DOCUMENT SUBMISSION WINDOW, INCLUDING HOW THE AMOUNT WAS CALCULATED (INCLUDING ITEM, PROJECT AND CATEGORY) AND WHAT THE SUPPLEMENTAL PAYMENT AMOUNT IS. THE COUNTY SHOULD ALSO BE INDICATED IN THE DESCRIPTION FIELD. USE THE “SUPPLEMENTAL ESTIMATE REVIEW” AS DOCUMENT CATEGORY.

THE DOCUMENT SUBMISSION FEATURE IS USED TO NOTIFY FINAL RECORDS AND MATERIALS AND TESTS OF THE SUPPLEMENTAL ESTIMATE AND TO GET THEIR APPROVAL FOR PAYMENT. UPON NOTIFICATION TO REVIEW THE ESTIMATE, FINAL RECORDS AND M & T WILL VIEW THE DESCRIPTION IN THE DOCUMENT SUBMISSION REVIEW AND COMPARE TO THE FINAL ESTIMATE (CHECK CALCULATIONS AND, IF APPLICABLE, NEW QUANTITIES FOR TEST REPORTS).

AFTER ENSURING M&T’S APPROVAL IN DOCUMENT SUBMISSION WINDOW, FINAL RECORDS WILL GIVE THEIR APPROVAL, ENTER THE SUPPLEMENTAL PAYMENT AMOUNT AND THE FINAL TOTAL CONTRACT PAYMENT AMOUNT INTO THE REMARKS FIELD OF THE DOCUMENT SUBMISSION REVIEW WINDOW AND APPROVE THE DOCUMENT SUBMISSION.

THE DOCUMENT SUBMISSION IS THEN FORWARDED TO THE DESIGNATED OPERATIONS REPRESENTATIVE FOR APPROVAL PRIOR TO PAYMENT.

AFTER THE DOCUMENT SUBMISSION HAS THE APPROVAL OF FINAL RECORDS, MATERIALS AND TESTS, AND THE DESIGNATED OPERATIONS REPRESENTATIVE, FINAL RECORDS WILL NOTIFY THE FIELD OFFICE THAT THE SUPPLEMENTAL ESTIMATE MAY BE APPROVED BY THE OFFICE STAFF AND CONTINUE THROUGH THE ESTIMATE APPROVAL PROCESS.
Creating a Document Submission of the Supplemental Estimate

To begin the document submission review process, the user selects one or more reviewers. The reviewer receives an In-Box notification that the document is ready for review. After reviewing the document, the reviewer records his recommendation on the Review Submitted Document panel. A recommendation cannot be modified after it is saved, but a reviewer can add another recommendation. A new tracking record is created for every new recommendation. The user can track the document reviews in the lower pane the Document Submission panel.

![Figure 1. Document Submission Window](image)

The Document Submission panel is used to submit supplemental estimates for review by final records, material & tests, and the regional construction supervisor prior to starting the estimate approval process.

A document submission with the category of supplemental estimate review should be created before the supplemental estimate is generated. This document submission should be forwarded to final records and materials & tests.

Final records will forward to the operations engineer and after approval to the office staff.

When the office staff receives this document submission notifying them of final records approval, they will generate and approve the supplemental estimate at the first level.
Exercise 1

In this exercise, add a document submission record and forward it for review.

**User ID** jj00032  **Password** pass

**Connection** Training Server

**Group Name** FIELD – Office Staff [OSTAFF]

1. Start and log onto SiteManager as user jj00032 while connected in server mode.

Open the Document Submission window.

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

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

4. Double-click the **Document Submission** icon. The system displays the Document Submission window.

Choose the contract.

5. From the **Services** menu, select **Choose Keys**. The system displays the Document Submitted Select window.

6. In the **Contract ID** area, in the **Contract ID** column, scroll to and double-click TRN356g. The system displays the Document Submission window.

Create a record.

7. In the **Submitted By** field, type Sandy Star.

8. In the **On** field, type < today’s date >.

9. In the **Document Type** dropdown list, select 14. N/A.

10. In the **Document Category** dropdown list, select 2. Supplemental Estimate Review.

11. In the **Description** field, type Project Number 67004-3213-14 McNairy County, Item Code 203-01, Category 0100, 1000 CY x $1.87 = $1870.00.

12. Save.
Forward it to a Materials and Tests reviewer.

13. From the Services menu, select Forward To. The system displays the Forward to Selected Users window.

14. In the User Name column, scroll to and select Pillars, Janice.

15. Click OK. The system closes the Forward to Selected Users window and displays the Document Submission window.

16. Save. The system displays a message to inform you that the mail has been sent.

17. In the message, click OK. The system displays each reviewer in the lower pane with a ‘Pending’ recommendation.

Forward it to a Final Records reviewer.

18. From the Services menu, select Forward To. The system displays the Forward to Selected Users window.

19. In the User Name column, scroll to and select Jones, Brad.

20. Click OK. The system closes the Forward to Selected Users window and displays the Document Submission window.

21. Save. The system displays a message to inform you that the mail has been sent.

22. In the message, click OK. The system displays each reviewer in the lower pane with a ‘Pending’ recommendation.

23. Exit SiteManager.

You’ve created a document submission record and forwarded it to a Materials and Tests person and a Final Records person for review.
Adding Document Reviews

The Document Submission Review window lets the user enter recommendations for a submitted document. To access this panel, the user must be one of the reviewers assigned to review the document. When a submitted document is forwarded for review, the system notifies all reviewers by In-Box message that the document is ready for review.

The top pane displays the document type, document category, submission date, name of the submitter, and document description. The reviewer adds a recommendation in the lower pane. The three valid choices are Approved, Approved as Noted, and Denied. The reviewer can add comments in the Remarks field. A recommendation cannot be changed or deleted after it is saved, but the reviewer can add another recommendation. A new record is created for each new recommendation.

Figure 2. Document Submission Review Window

YOU CAN ONLY ACCESS THIS WINDOW IF A REVIEW IS DUE FROM YOU.

THE DOCUMENT TO REVIEW CAN BE EITHER HARD COPY OR SOFT COPY. THE DOCUMENT ITSELF IS NOT DISPLAYED ON THIS PANEL.
Exercise 2

In this exercise, review a submitted document for Materials and Tests.

User ID jj00036 Password pass
Connection Training Server
Group Name REG – M&T Supervisor [MTSUP]

1. Start and log onto SiteManager as user jj00036 while connected in server mode. The system displays the Available Groups for < > window.

2. In the Group Name column, double-click REG – M&T Supervisor. The system displays the SiteManager Panel window.

View the documents submitted for review.

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

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


4. In the Contract ID column, scroll to and double-click TRN356g.

5. In the Documents Submitted area, in the Document S. No (Document Serial Number) column, scroll to and double-click 1.

Add a review record.

6. In the Recommendation area, click the Approved button.

7. In the Remarks field, type OK.

8. Save.

9. Exit SiteManager.

You’ve added a review record for Materials and Tests.
Exercise 3

In this exercise, review a submitted document for Final Records.

User ID  jj00037  Password  pass
Connection  Training Server  Group Name  REG – Construction Final Records [FRECSTF]

1. Start and log onto SiteManager as user jj00037 while connected in server mode.

Open the Document Submission Review window.

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

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


5. In the Contract ID area, in the Contract ID column, scroll to and double-click TRN356g.

6. In the Documents Submitted area, in the Document S. No (Document Serial Number) column, scroll to and double-click 1.
Add a review record.

7. In the **Recommendation** area, click the **Approved** button.

8. In the **Remarks** field, type **Supplemental Payment Amount $1870, New Final Contract Price $752,585.75**.

9. **Save**.

10. **Exit SiteManager**.

_You’ve added a review record for Final Records._

### Viewing Document Submission Recommendations

Use the Document Submission window to view and track document reviews.

![Document Submission Window](image)

Figure 4. Document Submission Window
Exercise 4

In this exercise, view the review records for a submitted document.

User ID          jj00032       Password       pass
Connection       Training Server
Group Name       FIELD – Operations Office Staff [OSTAFF]

1. Start and log onto SiteManager as user jj00032 while connected in server mode.

Open the Document Submission window.

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

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


5. On the toolbar, click the Open button. The system displays the Document Submitted Select window.

6. In the Contract ID area, in the Contract ID column, scroll to and double-click TRN356g.

View the list of reviewers.

7. In the Documents Submitted area, in the Document S. No (Document Serial Number) column, scroll to and double-click 1.

8. Have both Materials & Tests and Final Records approved the document submission?


Prepare for the next exercise.

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

You’ve acquired approval from Final Records and Materials & Tests. You may now generate and approve the supplemental estimate.
Generating a Supplemental Estimate

After the final estimate, it may be necessary to pay an additional amount to the contractor. To track this payment in SiteManager, it is necessary to generate a supplemental estimate. You can continue to generate an unlimited number of supplemental estimates if the contract status remains active.

![Figure 5. Generate Estimate Window]

**Exercise 5**

In this exercise, generate a supplemental estimate.

User ID  jj00032  Password  pass  
Connection  Training Server  
Group Name  FIELD – Operations Office Staff [OSTAFF]

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

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

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

4. In the **Contract** area, in the **Contract ID** column, scroll to and double-click **TRN356g**.
Generate the supplemental estimate.

5. In the Type area, note that the Supplemental button has been selected.

6. In the Date area, in the End field, type 050116 (the same date as begin date)

7. In the Supplemental Amount field, type 1870.00.

8. On the toolbar, click the Generate Estimate button. The system displays messages to inform that the process has been submitted.

9. In the message about the process submission, click OK.

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

Prepare for the next exercise.

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

*All estimate approvals are entered in the Estimate Approval window as described in the ‘Estimates Basics and Progress Estimates for Office Documentation’ and ‘Contract Finalization for Office Documentation’ sections of this training manual.*
Summary

To add a document submission record:

1. On the Contractor Management panel, double-click the Document Submission icon.
2. From the Services menu, select Choose Keys.
3. In the Contract ID area, scroll to and double-click the desired choice.
4. In the Submitted By field, type the name of the person submitting the document.
5. In the On field, type the date on which the document was submitted.
6. In the Document Type dropdown list, select the desired document type.
7. In the Document Category dropdown list, select the desired document category.
8. In the Description field, type a description of the document.
9. Save.

To assign a document reviewer:

1. On the Contractor Management panel, double-click the Document Submission icon.
2. Click the Open button.
3. In the Select Contract area, scroll to and double-click the Contract ID.
4. In the Documents Submitted area, scroll to and click the document.
5. Click OK. The system displays the Document Submission panel with information about the submitted document.
6. From the Services menu, select Forward To.
7. In the Forward to Selected Users area, scroll to and click the reviewer.
8. Click OK. A message says ‘Mail sent.’
9. Click **OK**.

10. To select another reviewer, repeat Steps 6 through 9.

11. **Save**. The system displays each reviewer in the lower pane with a ‘Pending’ recommendation.

To review a submitted document:

1. Receive notification by In-Box message that the document is ready for review.

2. Review the document, which could be either hard copy or soft copy.

3. On the **Contractor Management** panel, double-click the **Document Submission Review** icon. The system displays the Documents Submitted Select window.

4. In the **Select Contract** list box, scroll to and double-click the Contract ID.

5. In the **Submitted Document** list box, scroll to and click the document.

6. Click **OK**. The system displays the Document Submission Review panel with information about the submitted document.

7. In the **Recommendation** area, click the **Approved** or **Approved As Noted** or **Denied** button.

8. In the **Remarks** field, type comments to add to the review.

9. **Save**.

10. To add another review, click the **New** button and repeat Steps 7 through 9.
To generate a supplemental estimate:

1. On the Estimate panel, double-click the Generate Estimate icon.
2. Scroll to and click the desired contract.
3. Click OK.
4. Click the Supplemental button.
5. In the Supplemental Amount field, type the desired supplemental amount.
6. On the calendar, click the end date if desired.
7. Click the Generate Estimate button.
8. Click OK.

To approve a supplemental estimate:

1. On the Estimate panel, double-click the Estimate Approval icon.
2. In the list box, scroll to and click the desired record.
3. Click the Approved check box for your level.
4. Click OK.
5. Save.
6. When complete, click the Close button.
Review Exercise

In this exercise, review the supplemental estimate process.

User ID       jj00032  Password  pass
Connection    Training Server
Group Name    FIELD – Operations Office Staff [OSTAFF]
Prior Keys    TRN356g

1. What is the first step in the Supplemental Estimate process and what window in SiteManager is used for this step? __________

2. Create a new Document Submission record for a supplemental estimate.

3. Forward the Document Submission record to Kim Brady and Casey Miller.

4. Exit SiteManager.

5. Log in as jj00038.


7. Exit SiteManager.

8. Log in as jj00040


10. Exit SiteManager.
Answers

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Getting Started

Not applicable.

Common Functionality

Exercise 1

5. Update  
6. None  
12. Open

Exercise 2

2. Taylor Smith  
3. 00/00/00  
4. TRN349  
5. New

Exercise 3

5. New, then Choose Keys
Activating Contracts for Office Documentation

**Exercise 2**
2. Region 2, Unit 723
3. Completion Date
4. $14,657,837.81

**Exercise 3**
2. Overton

**Exercise 5**
3. 05/17/14
4. 04/30/17

**Exercise 6**
2. Jamie Nopps

**Exercise 7**
2. Highways, Inc.
3. Johnson & Company
4. Hudson Insurance Co

**Exercise 8**
2. 2.94%

**Exercise 9**
5. SR-84; EXIST. SR-85, FROM NEAR WINDLE RD. TO SR-84
6. State Route 84
**Exercise 10**

5. $50.00000

6. 11,179.000

10. (SEE PLANS DESCRIPTION)

**Exercise 11**

4. 1.00000

5. $0.000

**Exercise 13**

4. Four

5. Two

7. 07/10/14

8. No, because the Parent Subcont Nbr field is blank.

**Exercise 14**

2. Four

3. Quantity: 5,000.000, Amount: $202,000.00

**Review Exercise**

3. Region 2, Unit 723

4. 05/16/14

5. Hudson Insurance Co.

8. No. It has a bid quantity. An add-on item will never have a bid quantity.

11. Tennessee Texture, LLC

12. Yes

13. Yes, the Approval Date field has been populated.
Initializing Contracts for Office Documentation

Exercise 1

20. So that a notice will go to the District Supervisor if the Actual Date is not entered on or before 04/03/16.

Maintaining Contracts for Office Documentation

Exercise 2

14. $12,788.07248

Exercise 5

5. The sample ID should be unique for each student.

Test Templates to Material Categories

Not applicable.

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

Exercise 8

4. DWR template required
8. DWR template
15. 40.00
Exercise 10

10. Yes – Highways, Inc.
12. Three types, three pieces
14. One

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

Exercise 5

27. 29.0
30. 29.0

Review Exercise

10. 40.0

Creating and Viewing Diaries
for Field and Office Documentation

Exercise 6

3. 57 degrees and partially cloudy

Exercise 7

3. 13.0

Exercise 8

3. Concrete Grinder (1), Pickup Truck (2), Crane (1)
5. Class “A” Operators, Foreman, Unskilled Laborer, Truck Driver (2 axles)
Understanding Estimates Basics and Progress Estimates for Office Documentation

Exercise 1
1. 126.000
2. 125.000
3. 1200.00
4. MARION CO. ST RT 27, WBL 19.5
5. 11/16/2015

Exercise 3
5. $1,412,011.08
6. Yes

Exercise 4
2. 5

Exercise 6
5. 4

Exercise 8
1. -0.040
2. 0.960
3. -0.260
4. T310

Exercise 12
9. Mix design asphalt percentage
**Exercise 13**

11. Yes

12. 307-01.08

**Exercise 14**

2. Yes

5. Yes

**Exercise 15**

2. There are fuel adjustments on 303-01, 307-01.01, 307-01.08 and 411-01.07; three items are fully paid; however, 307-01.01 is partially paid due to material shortage.

**Exercise 16**

2. No. All three bituminous items are below 5% (1.62%) so no payment adjustments were made.

**Exercise 17**

2. Partial payment due to material shortage is on 307-01.01 for 307a/c; however 307-01.08 is fully paid on 307 a/c.

**Exercise 18**

2. Yes. All the tons were adjusted because there were no material deductions.

**Exercise 19**

2. No. No payments for anti-strip items on this estimate.

**Exercise 20**

7. -20,000.00

9. -467.71
Exercise 21
6. 70.100  
7. 70.100  
9. 5,500.000  
10. 5,500.000  
12. 929.000  
13. 929.000  

Exercise 22
4. No  
7. Yes, for -20,000.00  

Exercise 23
1. $1,433,841.78  
2. Yes  
3. $-25,218.44  
4. No  
5. 1400  
6. -400  
7. -20,000.00  

Exercise 24
7. $1,412,011.08  

Exercise 25
2. 02/19/16  
3. jj00029
Exercise 26
6. PEND - Pending
7. $1,412,011.08

Exercise 27
16. PEND - Pending

Exercise 29
2. CNJ363 and CNJ287
3. Yes

Exercise 31
10. -.600

Review Exercise
1. Yes
3. $1,437,229.52
4. Yes
6. Overrun, Checklist Event and Deficient Tested Material
11. 4
13. 3
16. 1,400.00

Creating Disputes/Claims (Contract Change Requests) and Correspondence Logs for Office Documentation

Not applicable.
Understanding Change Orders for Office Documentation (Part 1)

Exercise 2
17. $25,500.00

Exercise 3
26. $25,200.00

Exercise 4
14. $0.00

Exercise 6
5. Additional Traffic Control
6. $25,500.00

Review Exercise
6. $51,800.00

Understanding Change Orders for Office Documentation (Part 2)

Exercise 4
5. Yes

Exercise 5
3. Holden, Berry
Finalizing Contracts for Office Documentation

Exercise 4

7. No

Exercise 5

7. Time Adjustment due to Quantity Increase

Review Exercise

3. 04/17/16

7. Generate Estimate

8. Only one, no discrepancies, no more DWRs

10. APRV (Approved) or INAP (In Approval) if last exercise not completed

Preparing for and Generating Supplemental Estimates for Office Documentation

Exercise 4

8. Yes

Review Exercise

1. Document the need for additional payment; Document Submission window.