SiteManager for Field Documentation

Instructor Edition

Release 3.6a

February 2011

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Objectives

In this course, you will learn the following:

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

- View Contract Funding
- View Stockpile Material Details
- View Subcontracts
- Download Data from the Server
- Understand the Pipeline Process in SiteManager
- Understand the Basic Concepts of Daily Work Reports
- Enter Basic Daily Work Report Information
- Enter Contractor Activity
- Enter Contractor Equipment Activity
- Enter Daily Staff Activity
- Select and Record Work Items
- Record Work on a DWR Template
- Copy a Daily Work Report
- Modify a Daily Work Report
- Upload Data to the Server
- View Pipeline Information
- Create a new Diary
- Preview a Daily Work Report
- Authorize a Daily Work Report
- Create a Charge Day

- View the Unauthorized DWR Report
- View the Installed Work Report
- Unauthorize and Correct a DWR Work Item Entry
- View the History of Daily Work Reports
- View the Installed Work Items Report
- View the Item Quantity Report
- View the Estimate Summary
- View Estimate Discrepancies
- View the Estimate Item Detail
- View the Estimate Item Paybook
- Generate the Summary To Contractor Report
- Record the Actual Date of a Checklist Event
- View a Key Date
- Correct Quantities for Approved Progress Estimates
- View QTY ADJ DWRs
- Understand the rules and life cycle of Change Orders
- View the Item Summary Window
- Track Change Orders
- View the Change Order Report

Table of Contents

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Section 1 Getting Started
for Field and Office Documentation

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

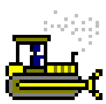
- Start and Exit SiteManager
- Navigate in SiteManager
- Open and control the display of multiple SiteManager components
- Close SiteManager components
- Change your password
- Identify update and inquiry display
- Use Open, New, and ‘Choose Keys’
- Use, Sort, Find, and Filter
- View System Attachments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

Using the Student Guide

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

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

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



Exercise 5-2

Instructor-led Exercises are identified by the Bulldozer graphic.

Figure 1-1

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

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

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

This is a very important concept. Stress it throughout the class.

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

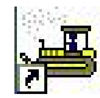
The procedures in this manual describe how to access components of SiteManager as if you just entered the application.

In TDOT, there are three Student Guides:

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

Starting AASHTO SiteManager

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

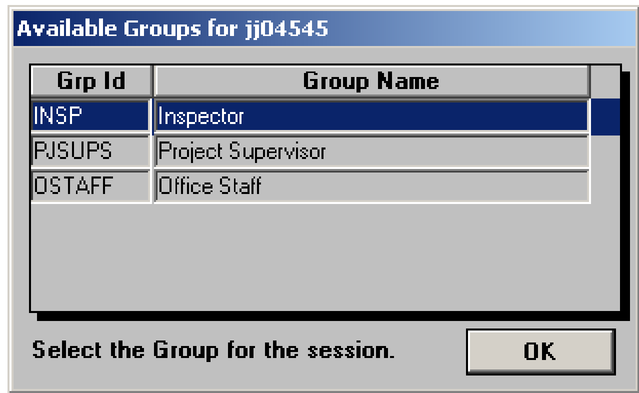


SiteManager Desktop Icon

Figure 1-2

The SiteManager Logon Dialog Box

Figure 1-3



The Group Dialog Box

Figure 1-4

This box only appears for Users in more than one group.

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

Exercise 1-1

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

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

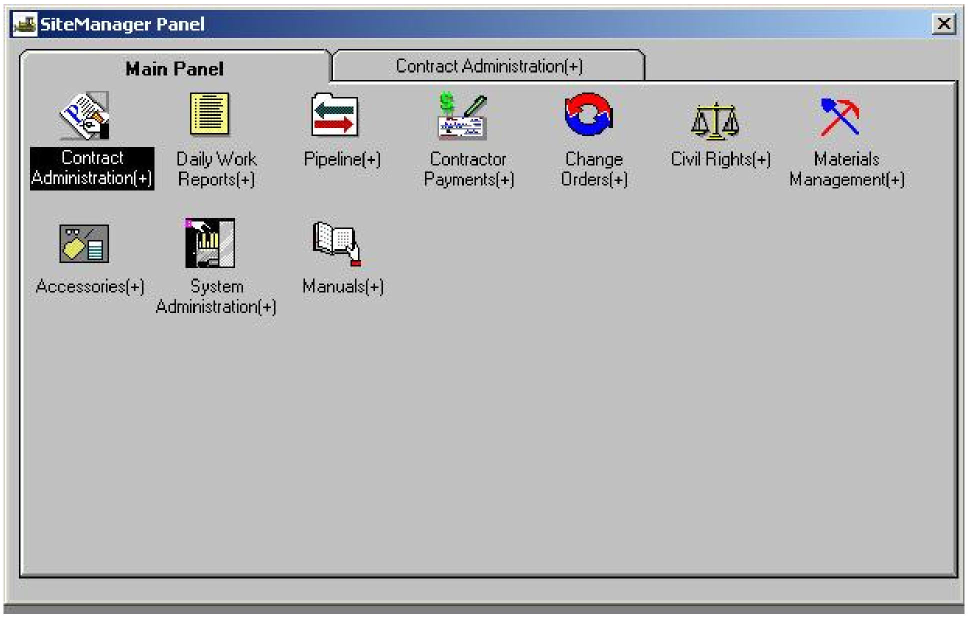
1. Click the **Start** button.
2. Click the **All Programs** choice.

Shift-tab if user ID not highlighted.

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

Main Panel Folder Tab of SiteManager Panel

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



Available icons are specific to your security group.

SiteManager Panel Window's Main Panel Tab

Figure 1-5

The SiteManager Status Bar

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

Everything is tracked by ID and Password. DON'T SHARE!

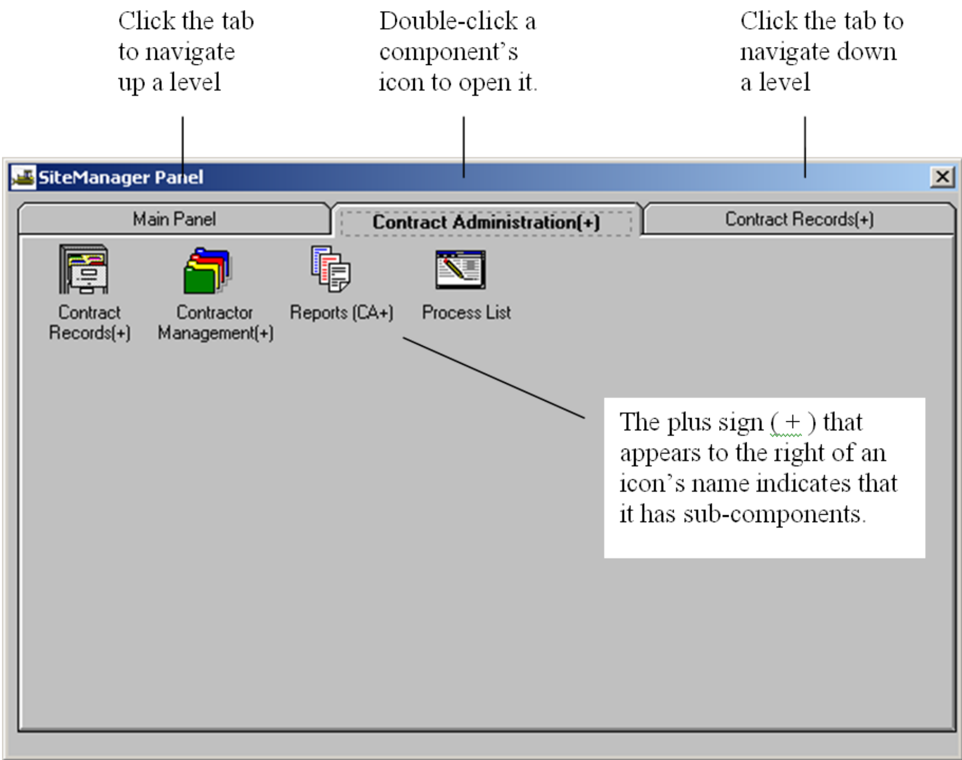
Status Bar

Figure 1-6

Discuss training program.

Navigating in SiteManager Using the Main Panel

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



Navigating in SiteManager

Figure 1-7

Exercise 1-2

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

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

1. View the icons on the Main Panel.
2. On the **Main Panel**, double-click the **Contract Administration** icon.
3. On the **Contract Administration** panel, double-click the **Contract Records** panel. SiteManager displays the Contract Records panel.

Note some of the icons contained on each panel.

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

Now, let’s browse another panel.

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

Now, let’s browse another panel.

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

Now, let’s browse another panel.

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

Now, let’s browse another panel.

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

Now, let’s browse another panel.

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

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

Now, let's browse another panel.

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

Now, let's browse another panel.

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

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

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

<u>TDOT Contract number naming convention:</u>

CN - required for finance system

B - letting year

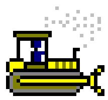
2003=B

2006=E

2007=F

Example: CNE037=Contract 37 from 2006 letting.

A, B, C on end is merely for training to create "snapshots" of contract in various stages of lifecycle.



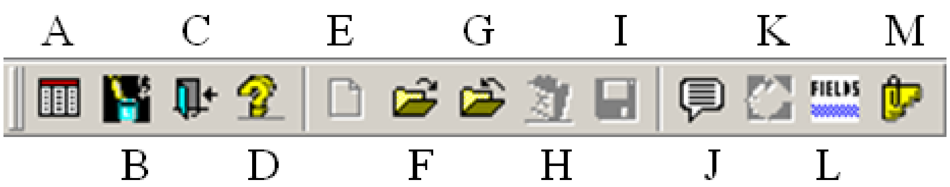
Exercise 1-3

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

Icons are grey when they are not available to select.

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

Some buttons are available from all windows; others are window-specific.



The SiteManager Toolbar

Figure 1-8

A	**SiteManager Panel**	H	**Delete**
B	**Toolbar**	I	**Save**
C	**Exit SiteManager**	J	**Remarks**
D	**Help Contents**	K	**Address**
E	**New**	L	**Generic Fields**
F	**Open**	M	**Attachments**
G	**Close**		

Remarks are unlimited. Use a word processor for spelling.

If the Remarks icon has lines across it (shown), that means there are remarks.

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

Controlling the Display of Multiple SiteManager Components

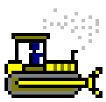
The File Menu

Figure 1-9

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

Opening Multiple SiteManager Components

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



Exercise 1-4

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

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

Now, let’s open another SiteManager component.

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

Discuss Hot Navigation.

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

The Window Menu

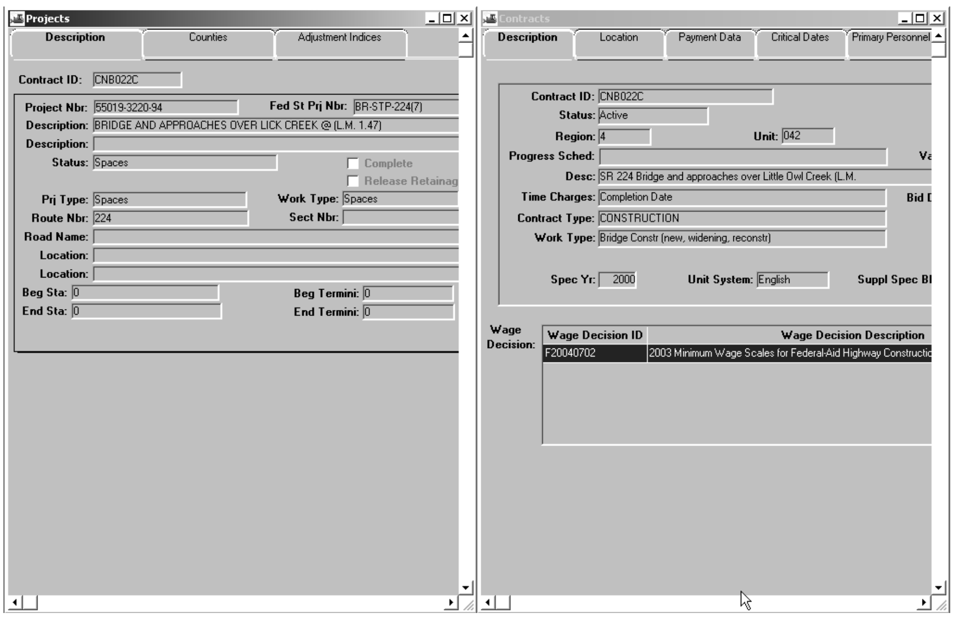
Figure 1-10

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

Controlling the Window Display Using Tile

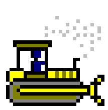
Tiling divides the screen into the number of SiteManager components that you have active. Typically, tiling is used to display two SiteManager components side by side horizontally to compare the entries in each or to return a single component to full screen once you have closed the other component. With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

Stress to only have two components open when tiling.



Two SiteManager Components Tiled

Figure 1-11



Exercise 1-5

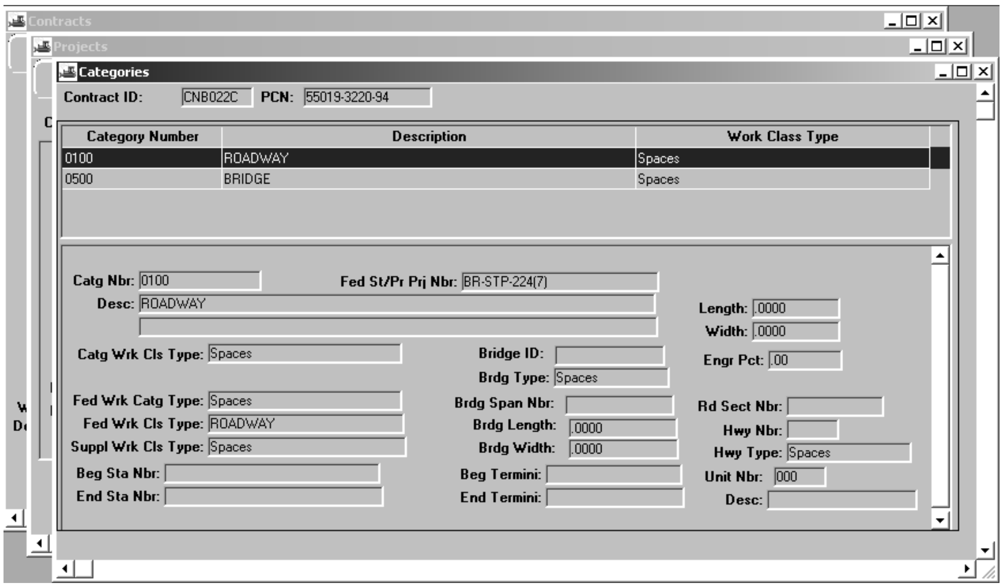
In the following exercise, you will tile the two current components of SiteManager.

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

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

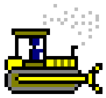
CONTROLLING WINDOW DISPLAY USING CASCADE

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



Three SiteManager Components Cascaded

Figure 1-12



Exercise 1-6

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

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

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

Now, let’s cascade the windows.

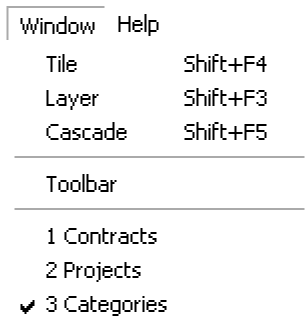
4. Click the **Window** menu.
5. Click the **Cascade** choice. SiteManager cascades the windows.

Now, let’s navigate between the cascaded windows.

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

CONTROLLING WINDOW DISPLAY USING LAYER

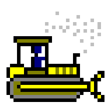
Layering displays the SiteManager component that you have active in the most efficient *full screen* display. Typically, layering is used to give each active component a full window for display or to return a single active component to full display after you have closed the other components that were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



Notice shows active windows allow to move back and forth between windows.

The Window Menu with Three SiteManager Components Active

Figure 1-13



Exercise 1-7

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

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

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

Now, let's navigate to another window.

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

Now, let's navigate to another window.

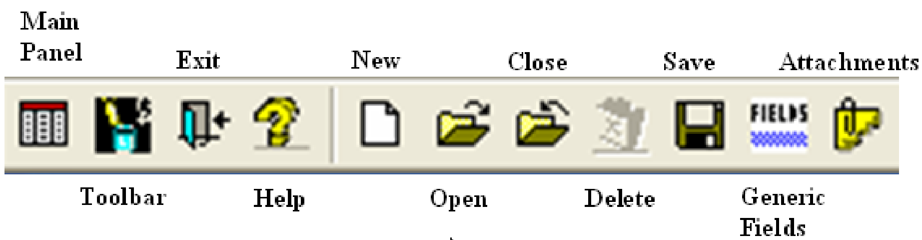
5. Click the **Window** menu.
6. Click the **Projects** choice. SiteManager displays the Project window.

Closing Versus Exiting in SiteManager

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

The File Menu

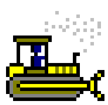
Figure 1-14



The SiteManager Toolbar

Figure 1-15

2+ ways to close/exit contrast to MS Word.



Exercise 1-8

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

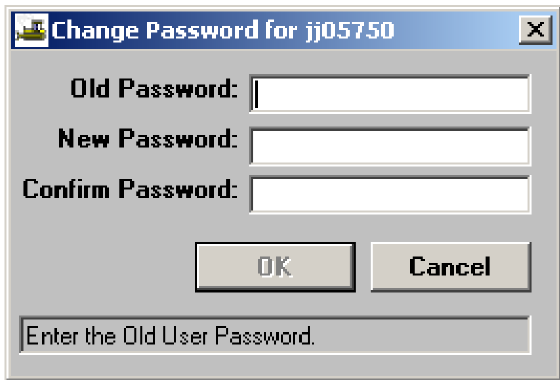
Demonstrate closing and opening Main Panel.

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

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

Changing Your SiteManager Password

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



The Change Password Dialog Box

Figure 1-16

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:

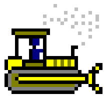
1. **In TDOT, when a User ID is first assigned to a User, the default password is PASSWORD (all caps). The User must change the password before logging on to SiteManager.**
2. **SiteManager User IDs for TDOT Criteria:**
   - **Seven characters in length.**
   - **The first two characters will be jj (in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

IMPORTANT TIPS REGARDING YOUR SITEMANAGER PASSWORD AND LOGON ATTEMPTS:

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

Mention the importance of establishing an unbroken chain of custody when in a court of law.

Everything is tracked by ID!



Exercise 1-9

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

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

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

Now, let's change the password.

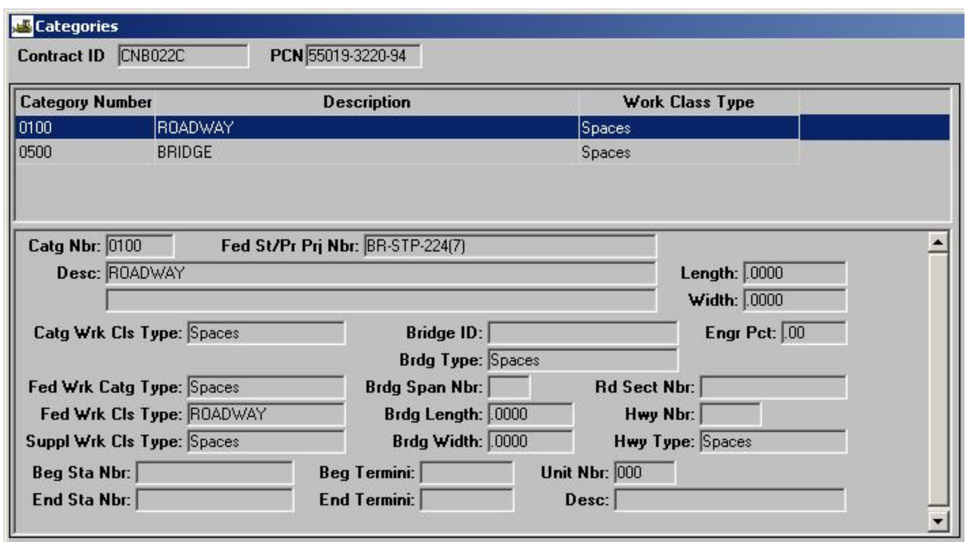
7. In the **Old Password** field, type **PASSWORD**.
8. Press the **Tab** key.
9. In the **New Password** field, type **pass**.
10. Press the **Tab** key.
11. In the **Confirm Password** field, type **pass**.
12. Click **OK**.

Security Overview

Depending on your SiteManager security privileges, you may have:

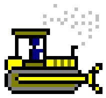
- Update rights to all SiteManager windows and data,
- Inquiry rights only and be able to access data and print reports, but not update information,
- Update rights on some SiteManager windows, inquiry only on other windows, and/or no access to other windows,
- Update rights on some SiteManager data,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

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



A SiteManager Window in Inquiry Only Mode

Figure 1-17



Exercise 1-10

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

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

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

Have the class note the look of inquiry mode.

Mention that this is one of several ways to Exit SiteManager.

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

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

Connect to: Training Standalone.

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

Tip: Select mode in Connect to field before entering password to avoid logging on to incorrect mode accidentally.

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

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

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

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

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

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

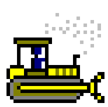
We are teaching instincts about using SiteManager.

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

Opening an Existing Record

Discuss hot navigation.

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



Exercise 1-11

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

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

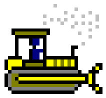
1. On the **Main Panel** tab, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** tab, double-click the **Daily Work Reports** icon.
3. What security mode are we in (inquiry or update)? **Update**
4. What Contract ID is displayed? **None**
5. On the toolbar, click the **Open** button.
6. In the **Contract** list box, scroll to and double-click contract ID **CNB022H**.
7. In the **Inspector** list box, scroll to and double-click user ID **jj05751**.
8. In the **Date** list box, scroll to and double-click DWR date **04/20/05**.
9. When informed that the DWR will be opened in read-only format, click the **OK** button.
10. When you want to open an existing record, do you use Open, New, or Choose Keys? **Open**

Note Authorized and Locked

DWRs are read only when you are not the creator and or Authorized or Locked.

Creating a New Record

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



Exercise 1-12

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

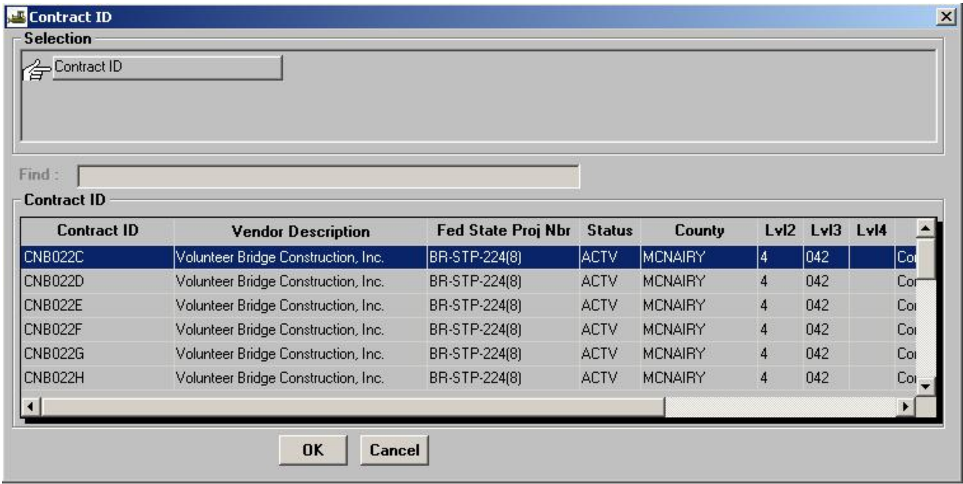
User ID: **jj05754** Group: **OSTAFF** Contract: **CNB022H**

1. On the toolbar, click the **New** button.
2. Note that you are ready to create a record for Contract CNB022H.
3. What is the Inspector’s Name? **Smith, Pat**
4. What is the DWR date? **00/00/00**
5. What is the Contract? **CNB022H, same as the one you opened.**
6. When you want to create a new record, do you use Open, New, or Choose Keys? **New**

Choosing Keys

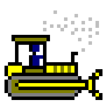
The Choose Keys choice displays a list of key field(s) to be selected. In many instances in SiteManager, the Choose Keys choice must be selected before a new record can be created.

Key =Contract ID



Choosing Keys

Figure 1-18



Exercise 1-13

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

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

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

Having chosen the correct key, only now are you ready to create a new DWR for a contract.

Using the Object Menu for Data Manipulation and Retrieval

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

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

The Object Menu

Figure 1-19

Criteria Window Buttons:

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

Add: Inserts a blank row after the last row.

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

Stress important distinction between Remove and Clear.

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

Load: Opens saved filter list. Saved filter allows for loading and deleting of saved (and default) filters.

Save: Opens filter name window to allow filter to be saved. The Default check box allows a filter to be automatically applied every time the window is accessed.

Criteria Window Conditions:

Using the Equal (=) condition:

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

Using the Like condition:

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

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

INSTRUCTOR NOTE:

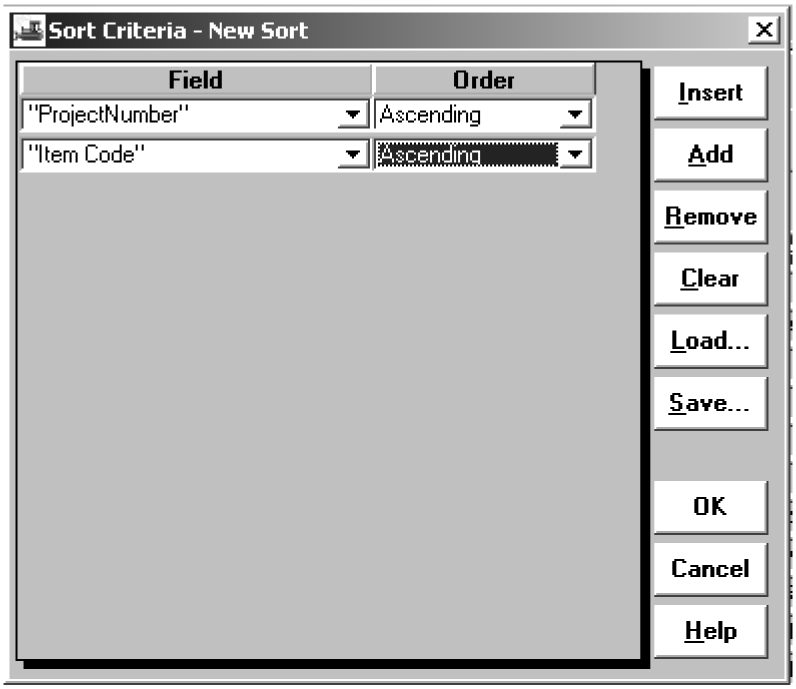
Filters that are not saved remain active until the user exits SiteManager.

Filters that are saved as Default filters remain for the user ID on the computer until they are removed. To remove a default filter:

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

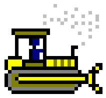
Sorting

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



The Sort Window

Figure 1-20



Exercise 1-14

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

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

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

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

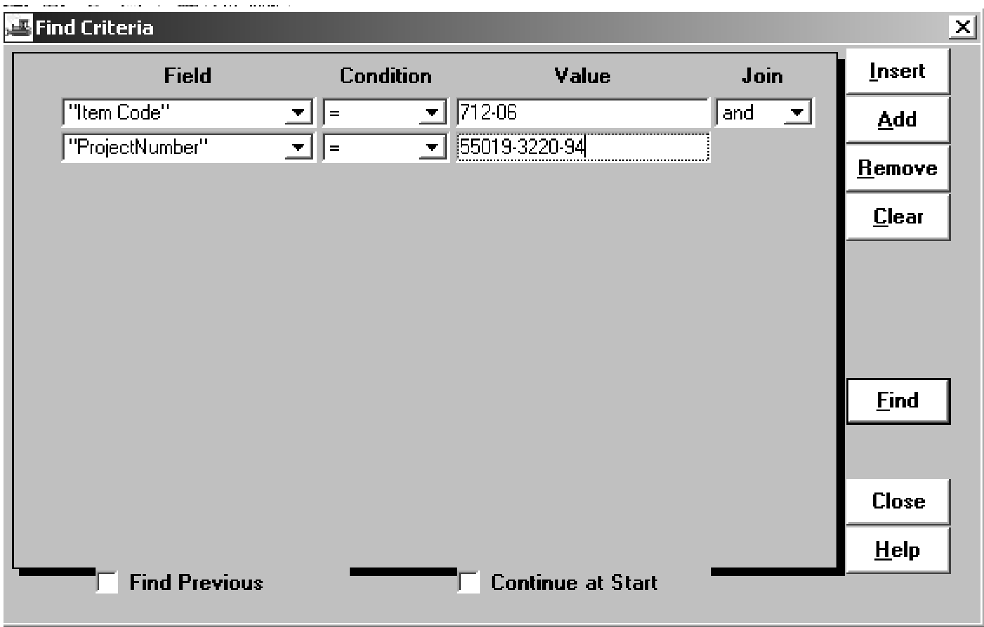
10. Click the **Description** column heading.
11. Click the **Item Code** column heading.
12. Click the **Instld** column heading.
13. Scroll to the bottom of the list to see the items that were reported installed on this DWR.

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

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

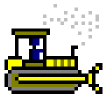
Finding

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



The Find Criteria Window

Figure 1-21



Exercise 1-15

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

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

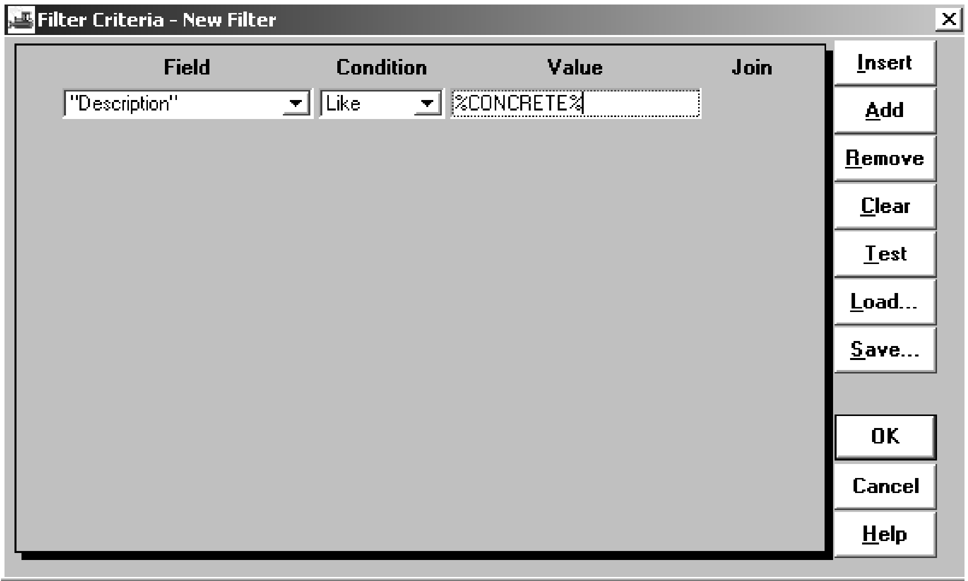
1. Position the selection pointer over the first record in the list at the top of the window.
2. Using the *right* mouse button, click the record.
3. From the object menu, click the **Find** choice. SiteManager displays the Find Criteria window.
4. On the **Find Criteria** window, click the **Add** button.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

AND for different fields,

OR for same field.

Filtering

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



The Filter Criteria Window

Figure 1-22

% = wild card only available with 'like.'

"Like" will find the word LIME as a part of any phrase.

Capitalization counts.

If you move the mouse while right clicking, you will default to the Find window.

Exercise 1-16

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

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

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

1. Position the selection pointer over a record in the list at the top of the window.
2. Using the *right* mouse button, click the record.
3. From the object menu, click the **Filter** choice. SiteManager displays the **Filter Criteria** window.
4. Click **No** to the Save Changes prompt.

   This step may not be necessary.

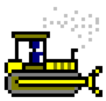
5. In the **Filter Criteria** window, click the **Add** button.
6. In the **Field** drop-down list, click **Description.**
7. In the **Condition** drop-down list, click **Like.**
8. In the **Value** field, type **%CONCRETE%.**

   % characters are variables.

9. Click the **OK** button.
10. When informed that the specified filter will return a number of rows, click the **Ok** button. The Work Items window displays the filtered results.

Clearing the Current Criteria

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



Exercise 1-17

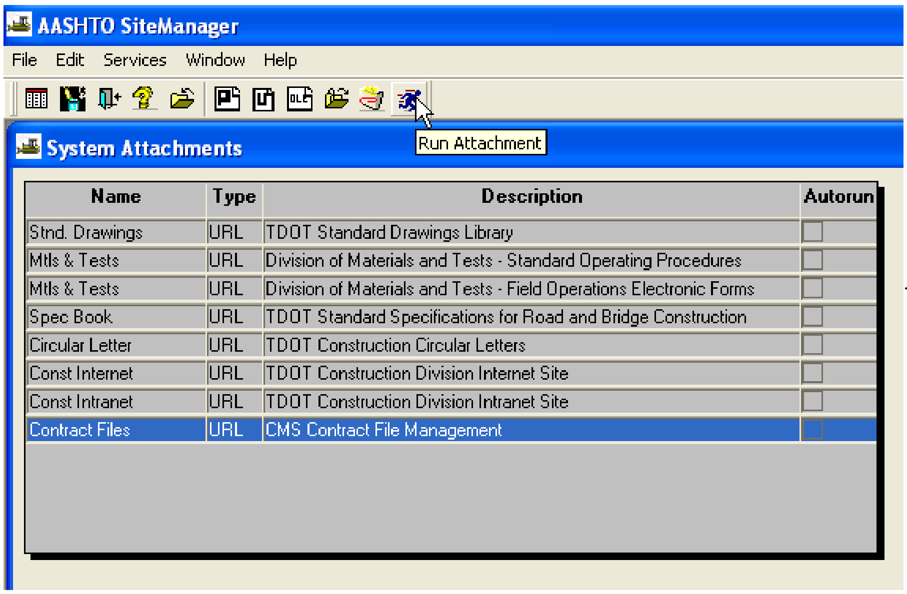
In the following exercise, you will clear the current filter.

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

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

System Attachments

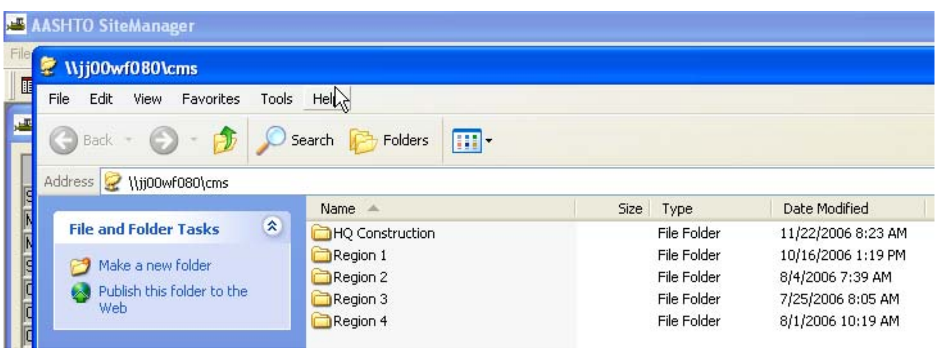
The System Attachments window allows URL links, Plug-In applications, and OLE attachments to be attached the SiteManager system without being attached to specific records. Plug in and OLE attachments are detailed in other sections of this training manual.



These are internet websites – you may need to connect to the internet to access them.

The System Attachments Window

Figure 1-23



The CMS File Management System Attachment

Figure 1-24

In TDOT, URL links are included as System Attachments.

The CMS Contract File Management attachment will open the File Management system. The URL this attachment opens is as follows.

\\jj00wf080\cms\

Exercise 1-18

In the following exercise, you will view System Attachments.

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

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

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

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

Support Resources

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

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

Printed Documentation and additional on-line training material can be obtained from SiteManager Support Personnel as needed.

<u>TDOT SiteManager Support Personnel</u>

Location	Name	Email	Phone
Region 1	Matt Douglas	G.Matthew.Douglas@tn.gov	(423) 907-7512
Region 2	Gail Hollis	Gail.Hollis@tn.gov	(423) 949-9202
Region 3	Gwen Ward	Gwen.Ward@tn.gov	(931) 684-0797
Region 4	Dan Robinson	Dan.Robinson@tn.gov	(731) 935-0220
HQ	Chris Hampton	Chris.Hampton@tn.gov	(615) 741-3542

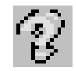
In TDOT, electronic documentation and on-line training material can be obtained from Support Personnel or downloaded from www.tdot.state.tn.us/construction/SiteManager.htm.

Using Help

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

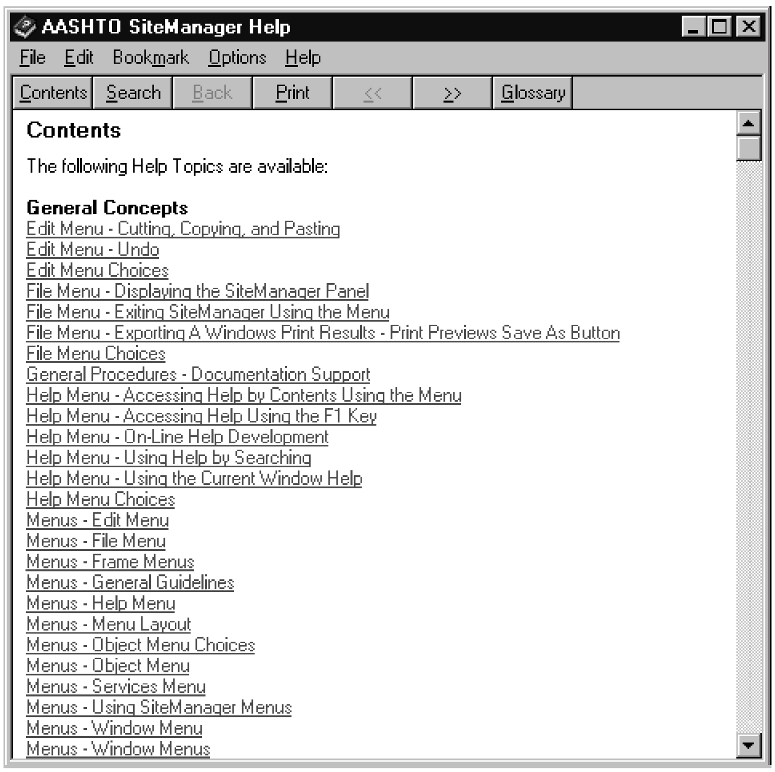
Using Help by Contents

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



Help Button

Figure 1-26



Help Contents

Figure 1-25

Exercise 1-19

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

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

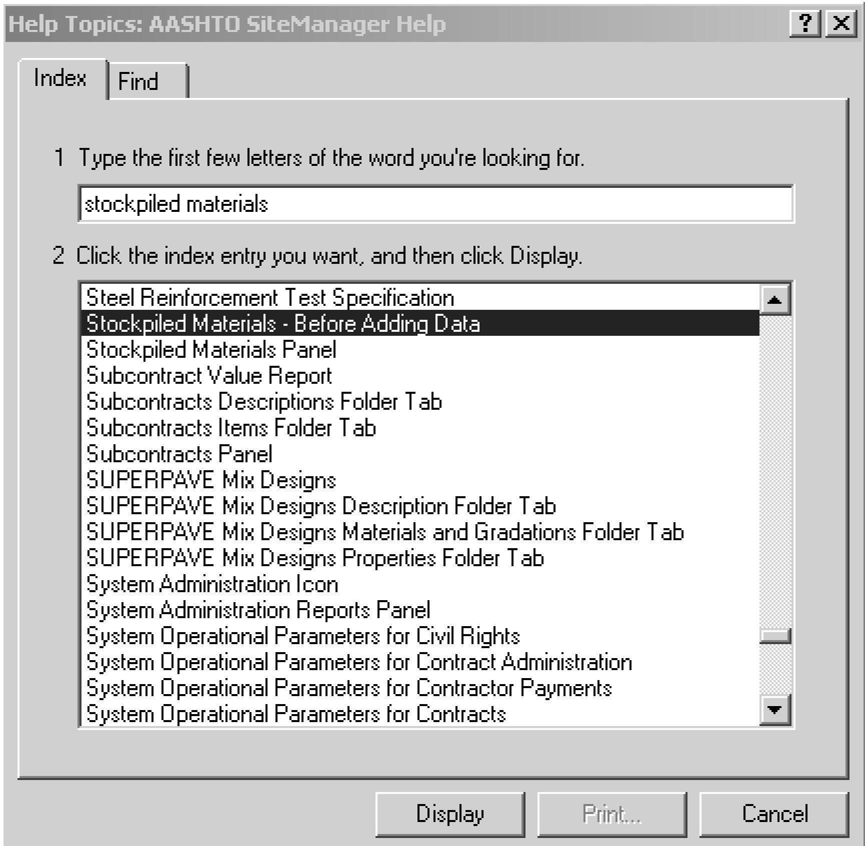
1. On the **Main Panel**, click the **Help** menu.
2. Click the **Contents** choice. SiteManager displays the AASHTO SiteManager Help window.
3. On the **Contents** page, scroll to the **Contracts Panel** section and click the **Contracts Description Folder Tab** topic.
4. Click the **Status-Contract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

Now, let's exit online Help.

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

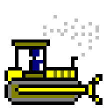
Using Help by Searching

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



The Help Search

Figure 1-27



Exercise 1-20

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

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

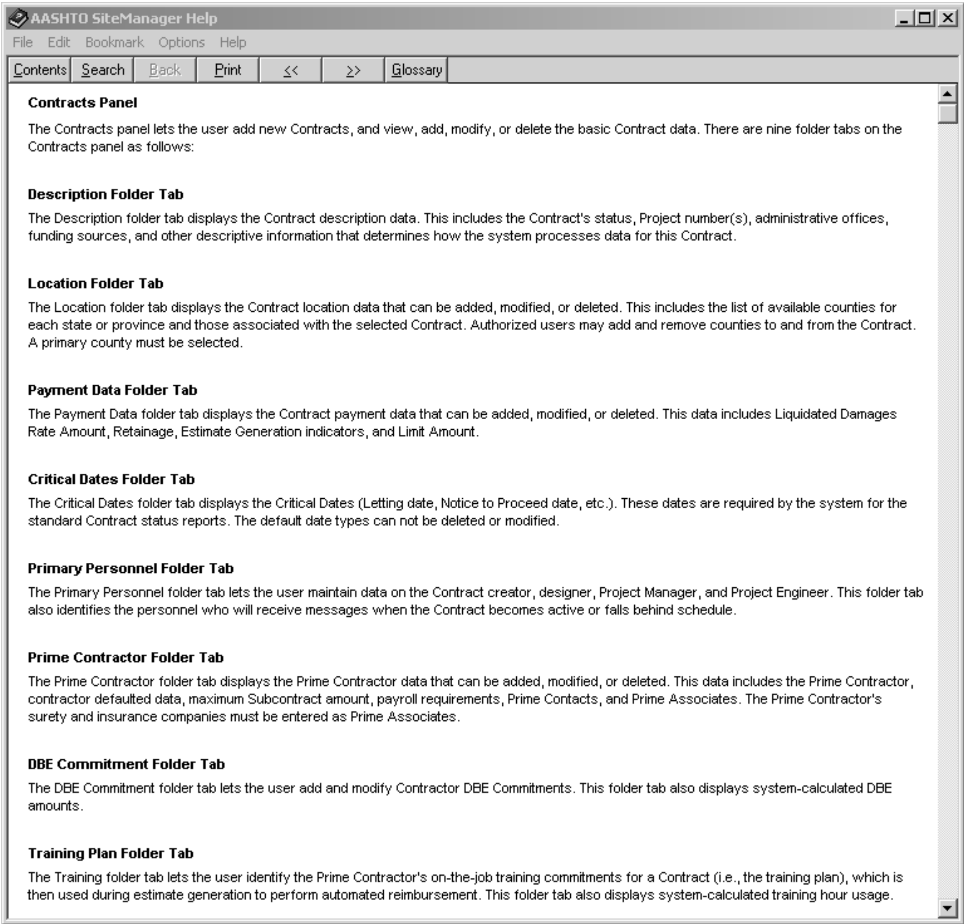
1. Click the **Help** menu and click the **Search for Help on** choice.

Search opens correctly in production.

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

Using the Current Window Help

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



Contracts Panel

The Contracts panel lets the user add new Contracts, and view, add, modify, or delete the basic Contract data. There are nine folder tabs on the Contracts panel as follows:

Description Folder Tab

The Description folder tab displays the Contract description data. This includes the Contract's status, Project number(s), administrative offices, funding sources, and other descriptive information that determines how the system processes data for this Contract.

Location Folder Tab

The Location folder tab displays the Contract location data that can be added, modified, or deleted. This includes the list of available counties for each state or province and those associated with the selected Contract. Authorized users may add and remove counties to and from the Contract. A primary county must be selected.

Payment Data Folder Tab

The Payment Data folder tab displays the Contract payment data that can be added, modified, or deleted. This data includes Liquidated Damages Rate Amount, Retainage, Estimate Generation indicators, and Limit Amount.

Critical Dates Folder Tab

The Critical Dates folder tab displays the Critical Dates (Letting date, Notice to Proceed date, etc.). These dates are required by the system for the standard Contract status reports. The default date types can not be deleted or modified.

Primary Personnel Folder Tab

The Primary Personnel folder tab lets the user maintain data on the Contract creator, designer, Project Manager, and Project Engineer. This folder tab also identifies the personnel who will receive messages when the Contract becomes active or falls behind schedule.

Prime Contractor Folder Tab

The Prime Contractor folder tab displays the Prime Contractor data that can be added, modified, or deleted. This data includes the Prime Contractor, contractor defaulted data, maximum Subcontract amount, payroll requirements, Prime Contacts, and Prime Associates. The Prime Contractor's surety and insurance companies must be entered as Prime Associates.

DBE Commitment Folder Tab

The DBE Commitment folder tab lets the user add and modify Contractor DBE Commitments. This folder tab also displays system-calculated DBE amounts.

Training Plan Folder Tab

The Training folder tab lets the user identify the Prime Contractor's on-the-job training commitments for a Contract (i.e., the training plan), which is then used during estimate generation to perform automated reimbursement. This folder tab also displays system-calculated training hour usage.

The Help on a SiteManager Window

Figure 1-28

Exercise 1-21

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

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

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

SM help is not TDOT specific.

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

Now, let’s open another contract.

4. Click the **Open** button.
5. In the **Contracts** list box, scroll to and double-click Contract **CNB022C**.

Ask – why did CNB022E open?

Hot navigation since open ‘E’ DWR.

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

Read it or print it out.

Now, let’s exit online Help.

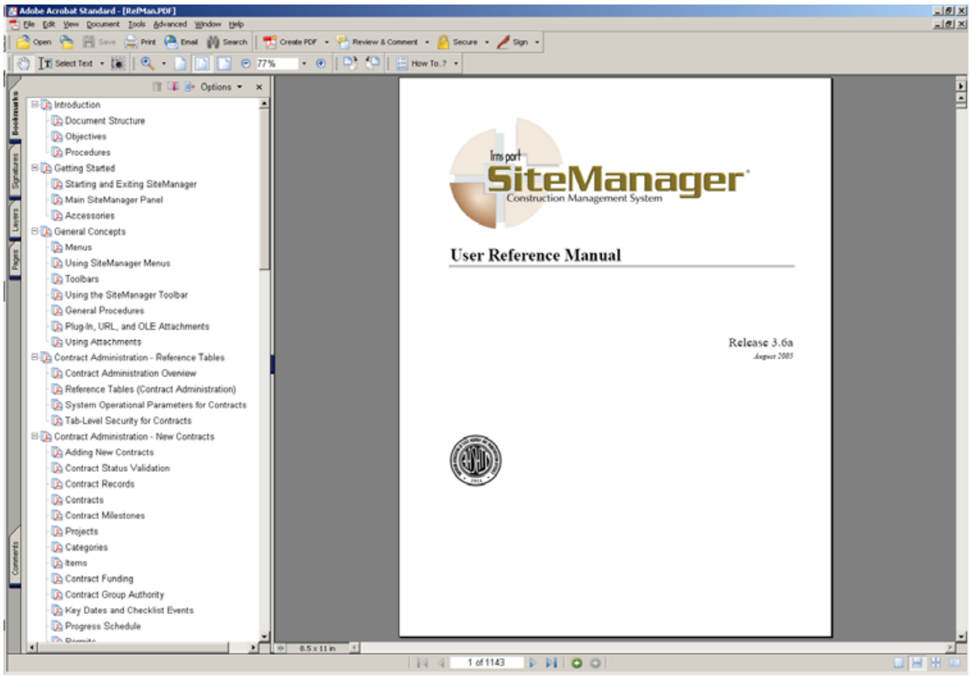
9. Click the **File** menu and click the **Exit** choice.

Now, let’s prepare for the next exercise.

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

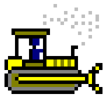
Viewing the User Manual

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



The User Reference Manual in PDF

Figure 1-29



Exercise 1-22

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

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

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

Now, let's search the reference manual.

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

First result links to page 386.

Now, let's exit the application.

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

Now, let's prepare for the next exercise.

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

Standard SiteManager Reports

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

<u>Contract Administration:</u>

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

<u>Contractor Payments:</u>

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

<u>Change Orders:</u>

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

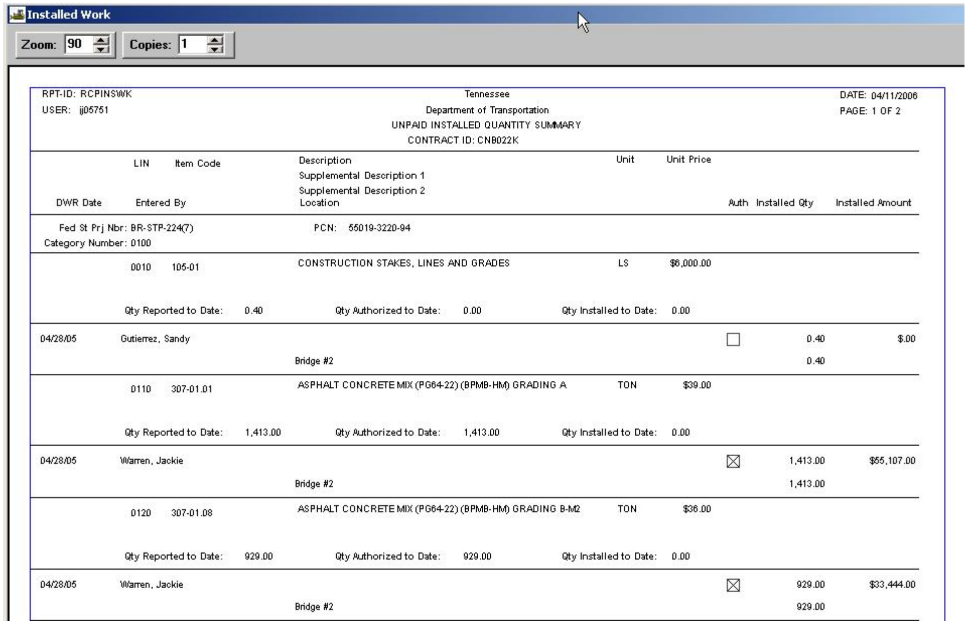
TDOT has created several custom reports in Crystal Reports. The custom reports are run from a separate application accessed through the intranet.

http://boe.tdot.state.tn.us/businessobjects/Enterprise115/InfoView/

✍ This is run from the Process List window.

General Reporting Concepts

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



RPT-ID: RCPINSWK
USER: jj05751

Tennessee
Department of Transportation
UNPAID INSTALLED QUANTITY SUMMARY
CONTRACT ID: CNB022K

DATE: 04/11/2006
PAGE: 1 OF 2

DWR Date	LIN / Entered By	Item Code	Description / Supplemental Description 1 / Supplemental Description 2 / Location	Unit	Unit Price	Auth	Installed Qty	Installed Amount
Fed St Prj Nbr: BR-STP-224(7)			PCN: 55019-3220-94					
Category Number: 0100								
	0010	105-01	CONSTRUCTION STAKES, LINES AND GRADES	LS	$8,000.00			
	Qty Reported to Date: 0.40		Qty Authorized to Date: 0.00	Qty Installed to Date: 0.00				
04/28/05	Gutierrez, Sandy					☐	0.40	$.00
			Bridge #2				0.40	
	0110	307-01.01	ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING A	TON	$39.00			
	Qty Reported to Date: 1,413.00		Qty Authorized to Date: 1,413.00	Qty Installed to Date: 0.00				
04/28/05	Warren, Jackie					☒	1,413.00	$55,107.00
			Bridge #2				1,413.00	
	0120	307-01.08	ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADING B-M2	TON	$36.00			
	Qty Reported to Date: 929.00		Qty Authorized to Date: 929.00	Qty Installed to Date: 0.00				
04/28/05	Warren, Jackie					☒	929.00	$33,444.00
			Bridge #2				929.00	

The Installed Work Report

Figure 1-30

To view and print a displayed report:

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

To Export a report:

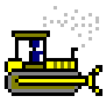
1. Run the report (saved reports may not be exported)
2. Click the **Services** menu **Export** choice.
3. In the **File Name** field, type the file name.
4. In the **Save as type** drop-down list, select the type of file: **Text**, **Exce**l, or **Lotus 1-2-3**.
5. Click the **Save** button.

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

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

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

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



Exercise 1-23

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

This example demonstrates how users could save a copy of a SM standard report that updates in real time. If addressing a question, saving the report will provide the User with a reference of the data.

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

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

Do not click the Generate Off-line file or Generate Off-line Print check boxes.

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

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

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

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

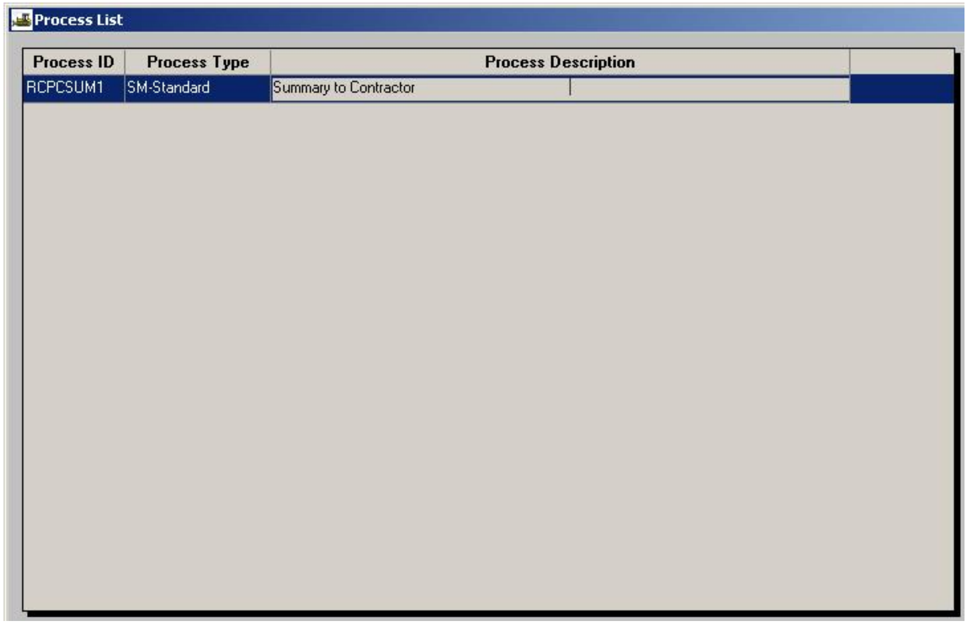
Now, let’s prepare for the next exercise.

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

Running a Process

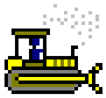
The Process List window in the Contractor Payments panel includes the Summary to Contractor Report. This is the only SiteManager Process that TDOT users will need to run.

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



The Contractor Payments Process List window

Figure 1-31



Exercise 1-24

In the following exercise, you will run a process.

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

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

This tells SM to run on this machine rather than the Server. When this option is selected, the data is up to date as of the last Basic Contract Data download.

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

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

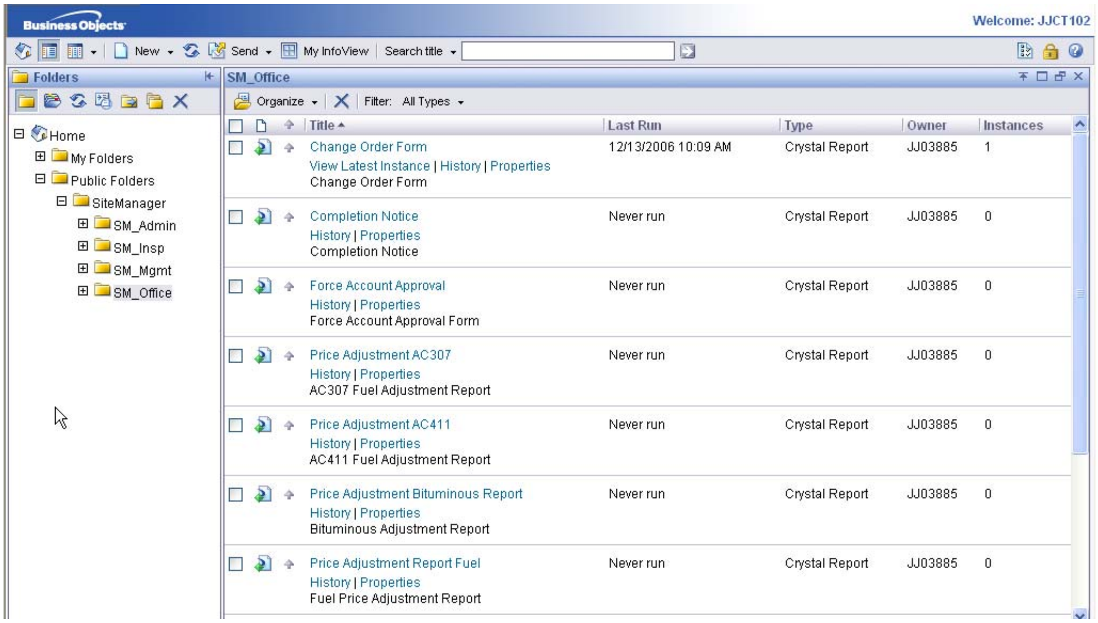
A copy of the report is saved at C:\SMTRAINS\SMFILES to view during training.

The steps to run a process in production are in the Review.

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

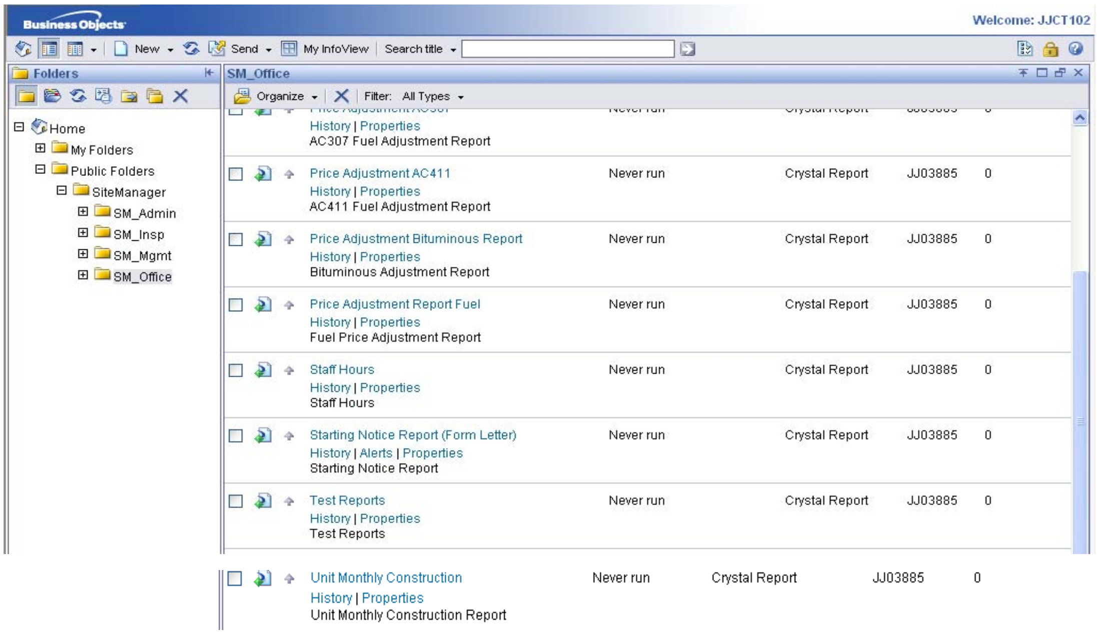
Accessing TDOT Custom Reports

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



TDOT Office Staff available reports window - page 1

Figure 1-32



TDOT Office Staff available reports window - page 2

Figure 1-33

TDOT Custom Reports are accessed through the following web address:

http://boe.tdot.state.tn.us/businessobjects/Enterprise115/InfoView/

Review for Section 1

To start SiteManager:

1. Double-click the SiteManager desktop icon.

Or

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

To select a main panel component of SiteManager:

1. Double-click the component's icon

To select up or down a level in SiteManager:

1. Click the level's folder tab.

To open more than one component of SiteManager:

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

To tile:

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

To cascade:

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

To layer:

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

To move between multiple layered SiteManager components:

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

To close a SiteManager component:

1. Click the **Close** button.

Or

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

To exit SiteManager:

1. Click the **Exit** button.

Or

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

To change your password:

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

To open an existing record:

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

To create a new record:

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

To choose keys after you enter a window:

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

To sort records:

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

Or

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

To find specific records:

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

To filter records:

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

To clear a filter:

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

To view System Attachments:

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

To access Help by Contents:

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

To access Help by searching:

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

To access Help on the current window:

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

To access Help on a field:

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

To access the User Manual documentation:

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

To generate any report:

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

To save a report:

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

To open a saved report:

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

To run a process:

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

To access TDOT custom reports:

1. Launch Internet Explorer.
2. Access web address **http://boe.tdot.state.tn.us/businessobjects/Enterprise115/InfoView/**
3. Click the **plus sign** next to **Public Folders**.
4. Click the **plus sign** next to **SiteManager**.
5. Click the desired group name.
6. Click the desired report name.
7. Enter the desired prompt values.
8. Click the **OK** button.
9. Print or Save the report as appropriate.

Summary Exercise for Section 1

Navigate means to close the window you are in and go to a different window

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

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

1. Log into SiteManager as **jj05754**.
2. Navigate to the **Items** window
   (Main Panel > Contract Administration > Contract Records > Items).
3. Select the first project for Contract **CNB022C**, and then any of the available items.
4. Are you in inquiry or update mode? **INQUIRY**
5. Click the **Close** button to close the **Items** window.
6. Navigate to the **Item Master** window
   (Main Panel > Contract Administration > Reference Tables > Item Master).
7. Use the **Find** feature to find the Item Code **204-06** for Spec Year **2000**.
8. What is the Item Description? **BEDDING MATERIAL (PIPE) CLASS A**
9. **Filter** for short description **%CLEARING%**.
10. What is the first item retrieved? **201-01 Clearing and Grubbing**
11. Clear the filter.
12. Click the **Close** button to close the **Item Master** window.
13. Navigate to the **Milestone**s window (Contract Administration > Contract Records > Milestones).
14. Access **Help** on the current window.
15. Click the **Close** button to close the **Milestones** window.
16. Navigate to the **User Manual** and find the **Estimate Generation** topic.
17. Click the **Close** button to close the **User Manual** window.
18. Navigate to the **Contractor Payment Report**s panel.
    (Main Panel > Contractor Payments > Reports)
19. In **Contractor Payment Reports**, run an **Installed Work Report** for contract **CNB022L**.
20. In Contractor Payments, navigate to the **Process List**.
21. Exit SiteManager.

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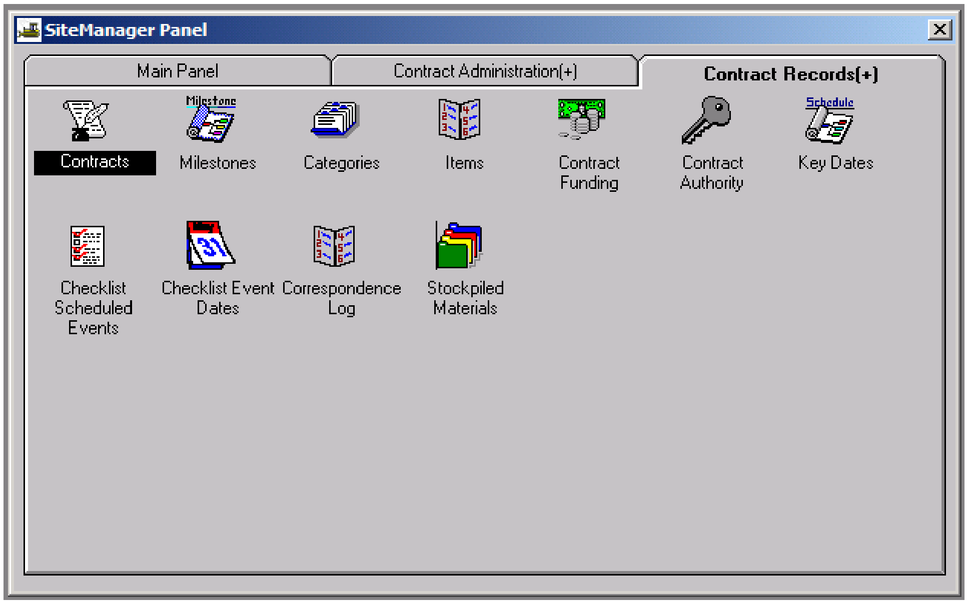
Section 2 Contract Administration
for Field Documentation

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

- View an Active Contract
- View Contract Milestones
- View Contract Projects
- View Contract Items
- View Contract Funding
- View Stockpile Material Details
- View Subcontracts

New Contracts

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



The Contract Records Panel

Figure 2-1

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

Exercise 2-1

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

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. Double-click the **SiteManager Training** program icon.
2. In the **User ID** field, type **jj05751**.

   Shift-tab if user ID not highlighted.
3. Press the **Tab** key.
4. In the **Password** field, type **pass**.
5. Press the **Enter** key.
6. Double-click the **Contract Administration** icon.
7. Double-click the **Contract Records** icon.
8. On the **Contract Records** panel, double-click the **Contracts** icon.
9. In the **Contract ID** list box, scroll to and double-click **CNB022E**.

Viewing a Contract

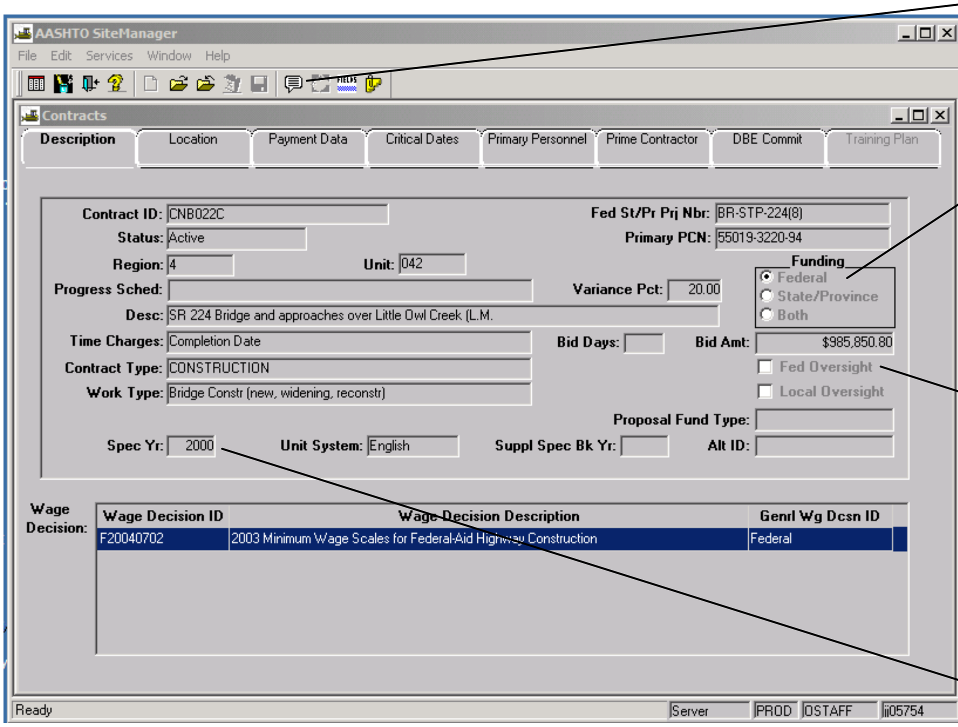
All Contracts will show as Federal. This is NOT a true representation of the funding. To view actual funding go to the Funding window.

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

Contract Time Charges

In SiteManager, the three types of Time Charges for Contracts are:

- **Completion Date -** Similar to TDOT "Calendar Days" contracts for non-resurfacing and non-mowing contracts. In SiteManager, TDOT Mowing, Litter Removal, and Sweeping & Drain cleaning contracts are Completion Date. Time cannot be suspended on Completion Date Contracts.
- **Calendar Day -** TDOT's Resurfacing Contracts (Completion Date contracts with a working window) are Calendar Day in SiteManager, with a set number of bid days. Time is started when the Notice to Proceed date is entered.
- **Working Days (Available Days) -** TDOT does not use at this time.



Click the Remarks button for additional contract description information.

In TDOT, all Contracts will show Federal in the Funding section.

HQ Finance will activate if Fed Oversight Contract. Local Oversight will not be used.

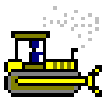
In TDOT, Spec Yr field does NOT reference a spec book. This shows the items are from the 2000 Item Master. (2001 Item Master is Metric).

The Description Folder Tab

Figure 2-2

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

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



Exercise 2-2

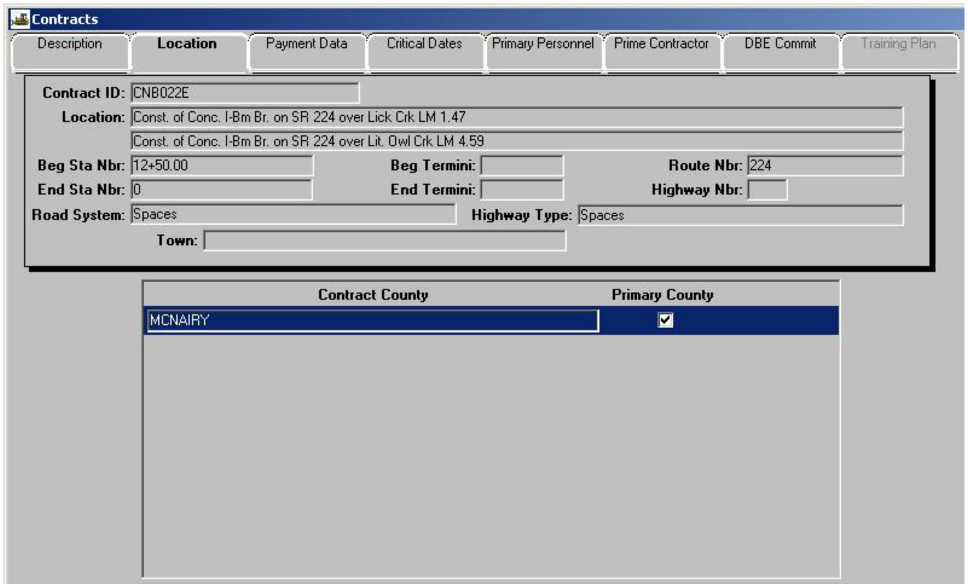
In the following exercise, you will review the description for a new active Contract CNB022E.

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. What region and unit is this contract assigned to? **Region 4, Unit 042**
2. How is time calculated on this contract? **Completion Date**
3. What is the dollar value of this contract? **$985,850.80**

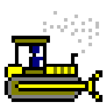
Viewing the Contract Location

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



The Location Folder Tab

Figure 2-3



Exercise 2-3

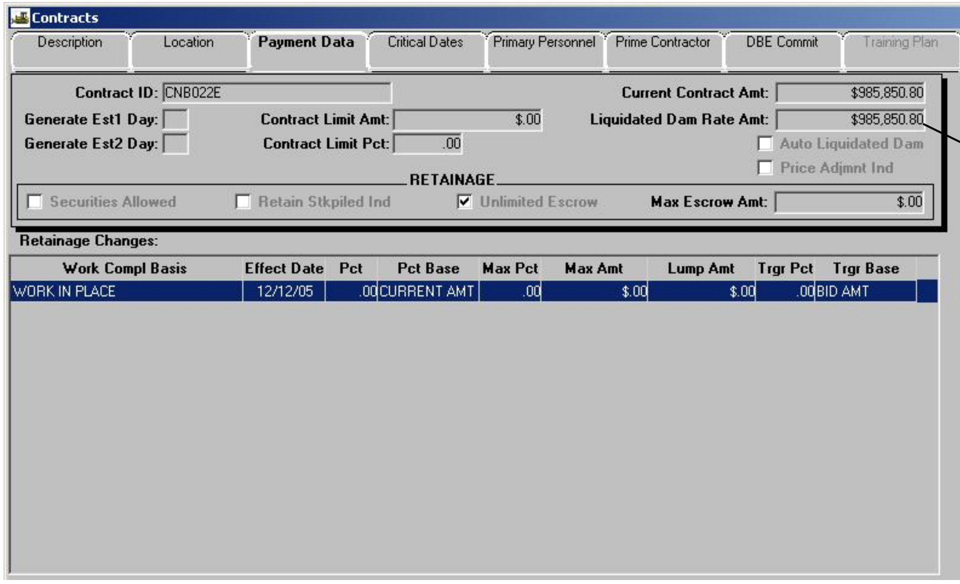
In the following exercise, you will view the location for Contract CNB022E.

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

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

Viewing Contract Payment Data

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

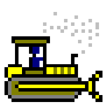


TDOT is not using Auto Liq. Dmg or any other function of this window.

The Payment Data Folder Tab

Figure 2-4

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



Exercise 2-4

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

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

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

Viewing Critical Dates

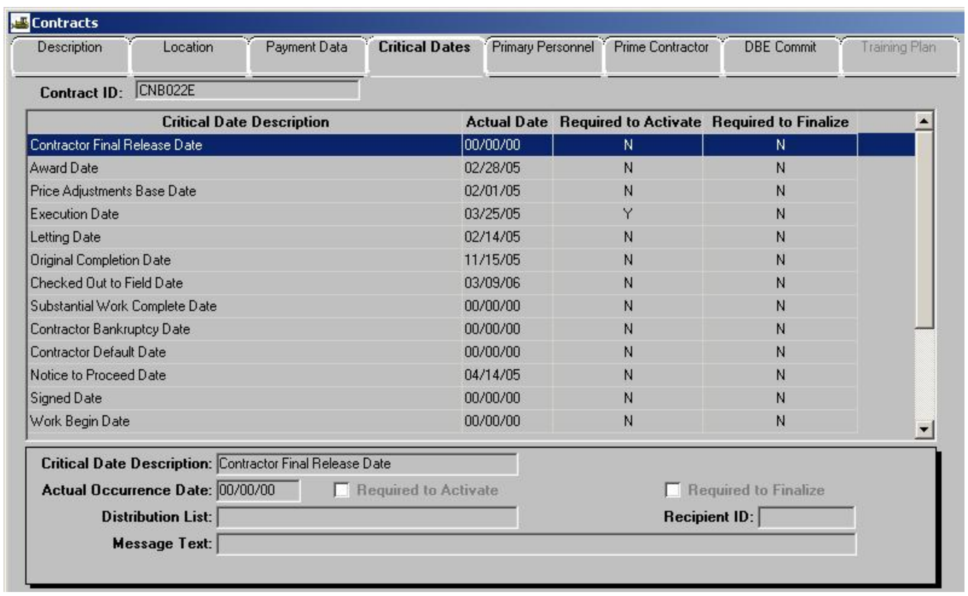
The Critical Dates folder tab displays Critical Dates in the life of the contract. The Critical Date types were defined during system development and cannot be added or deleted. These dates are considered critical because SiteManager includes them in the standard Contract reports. When a new Contract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

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

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

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

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.



The Critical Dates Folder Tab

Figure 2-5

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

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

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

Note Dates in bold text.

The TDOT Equivalents to Default Critical Dates

Table 2-1

Exercise 2-5

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

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

Can do DWRs and Diaries without a Notice to Proceed Date, but you can't generate an Estimate.

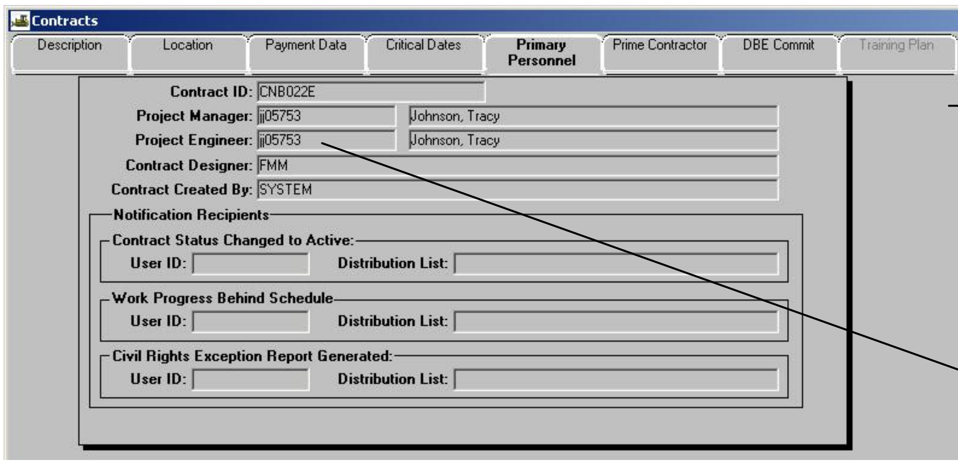
1. Click the **Critical Dates** folder tab.
2. In the **Critical Date Description** list box, scroll to and click **Notice to Proceed Date**. The data for the Notice to Proceed Date is displayed below the list.
3. What is the **Notice to Proceed Date**? **4/14/05**
4. What is the **Original Completion Date**? **09/15/05**

Viewing Contract Primary Personnel

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

When primary personnel are added or removed on this panel, the system adds or removes them on the Contract Authority panel automatically.

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



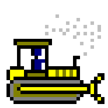
The User indicated here will receive system-generated messages about the Contract.

When a contract is Pending the Project Manager/Engineer field would be blank or contain an "N".

The Primary Personnel Folder Tab

Figure 2-6

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



Exercise 2-6

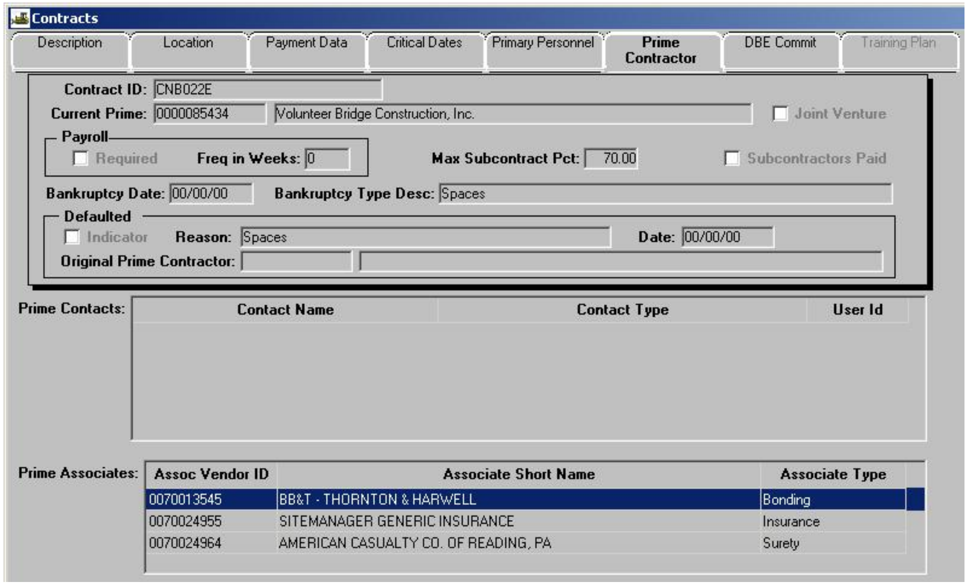
In the following exercise, you will view the Project Manager and Project Engineer assignments for contract CNB022E.

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

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

Viewing the Prime Contractor and Associates

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

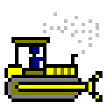


The Prime Contractor Folder Tab

Figure 2-7

Since TDOT does not record an insurance company for the prime contract the placeholder value, SiteManager Generic Insurance, is substituted for a real value. TDOT will record actual associates for:

- **Bonding**
- **Surety**



Exercise 2-7

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

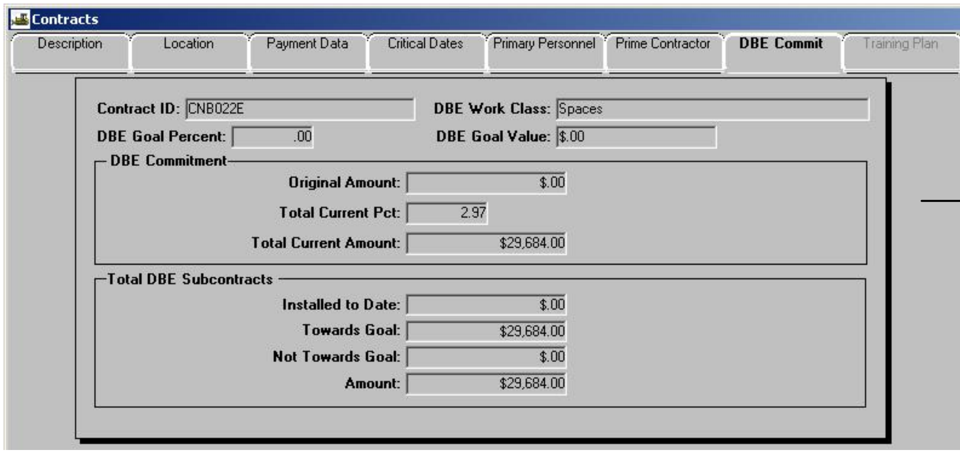
User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. Click the **Prime Contractor** folder tab.
2. Who is the Prime Contractor? **Volunteer Bridge Construction, Inc.**
3. Who is the Bonding Company? **BB&T – Thornton & Harwell**
4. Who is the Surety Company? **American Casualty Co. of Reading, PA**

Viewing the DBE Commitment Goal

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

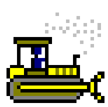
When you modify the DBE Goal Percent, the system recalculates the DBE Goal Value.



If the Contract has DBE commitments, this panel displays the Contract's actual DBE commitment amounts, which are based on work done by Subcontractors.

The DBE Commitment Folder Tab

Figure 2-8



Exercise 2-8

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

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. Click the **DBE Commit** folder tab.
2. What is the DBE Commitment Total Current Pct? **2.97%**
3. Click the **Close** button.

The Training Plan Folder Tab

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

Viewing Contract Milestones

TDOT calls these 'incentives,' 'goals,' or 'phased construction.'

The Milestones window lets the Office Staff modify and delete Contract Milestones. Office Staff also enters the dates the milestone work was started and completed.

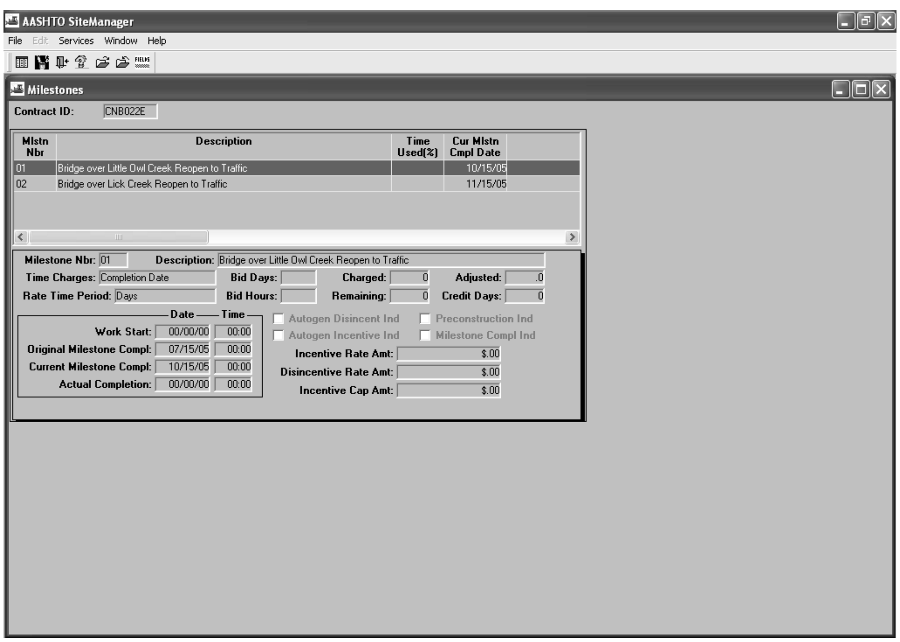
TDOT is using this window as a record keeping of days charged for milestones. Liquidated Damages are to be assessed under the appropriate pay item.

Milestone Time Charges

In SiteManager, the three types of Milestone Time Charges for Contracts are:

- Calendar Day and/or Completion Date Milestone: These types of Milestones require the "Work Start" date and "Actual Completion" date be entered. There will be <u>no</u> charge on the Diary Window Charge Tab for these types of Milestones.
- 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 Charge Tab for these types of Milestones.

  (Mowing Cycles will be the only Milestones using milestone "type" Working Days.)

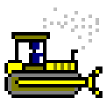


The Milestones Window

Figure 2-9

In TDOT, HQ Finance Office will create Milestones. Office Staff will start Milestones by entering the Milestone Work Start Date and Completion Date. Milestones are used for such things as phased construction, mowing and litter cycle.

TDOT will not auto generate disincentives or incentives. These are applied with pay items. The Milestone window is used as supporting documentation for these pay items.



Exercise 2-9

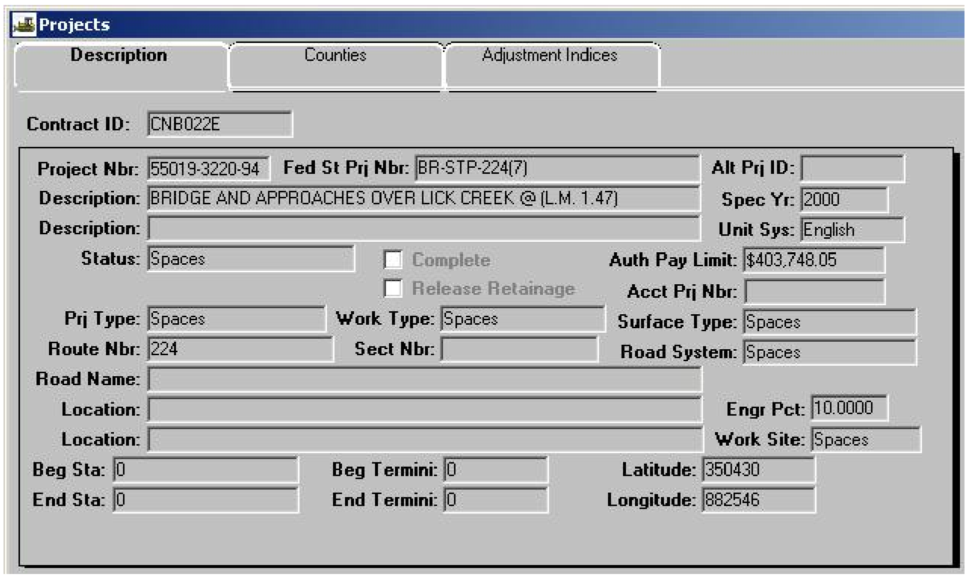
In the following exercise, you will view a Milestone for contract CNB022E.

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. On the **Contract Records** panel, double-click the **Milestones** icon.
2. How many milestones are currently listed for this contract? **2**
3. Click Milestone **01**.
4. What is the Original Milestone Compl. date? **7/15/05**
5. Click Milestone **02**.
6. What is the Original Milestone Compl. date? **8/15/05**
7. Click the **Close** button.

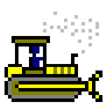
Viewing Contract Projects

The Project panel 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 Project Description folder tab. Items must be added through a Change Order.



The Project Description Folder Tab

Figure 2-10



Exercise 2-10

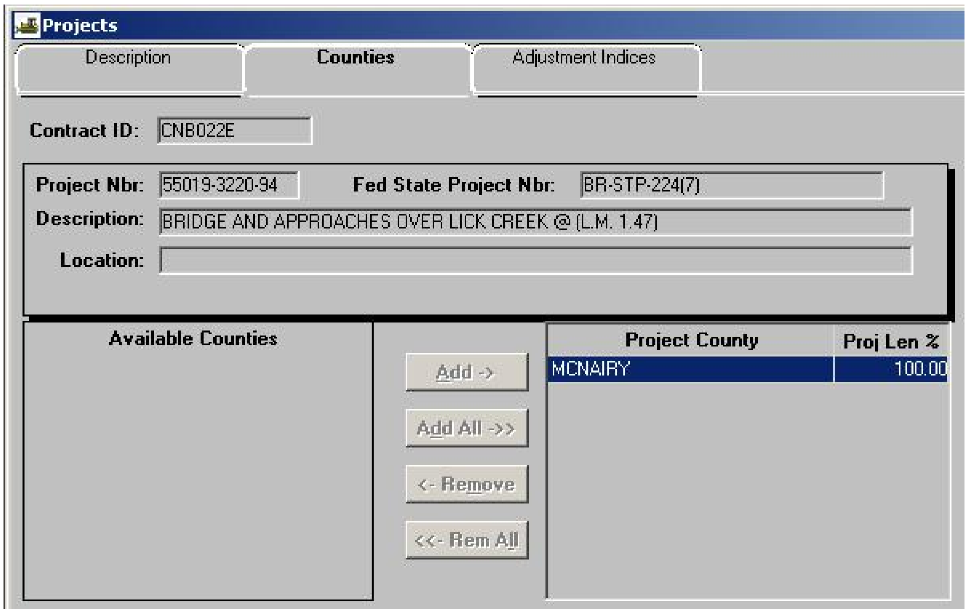
In the following exercise, you will review a Project Description for Contract CNB022E.

User ID: **jj05751**   Group: **INSP**   Contract: **CNB022E**

1. On the **Contract Records** panel, double-click the **Projects** icon.
2. How many Projects are on this Contract? **2**
3. In the **Project** list box, scroll to and double-click Project **55019-3220-94**.
4. What is the Project Description? **BRIDGE AND APPROACHES OVER LICK CREEK @ (L.M. 1.47)**
5. What is the Route Nbr? **224**

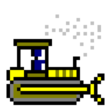
Viewing Project Counties

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



The Project Counties Folder Tab

Figure 2-11



Exercise 2-11

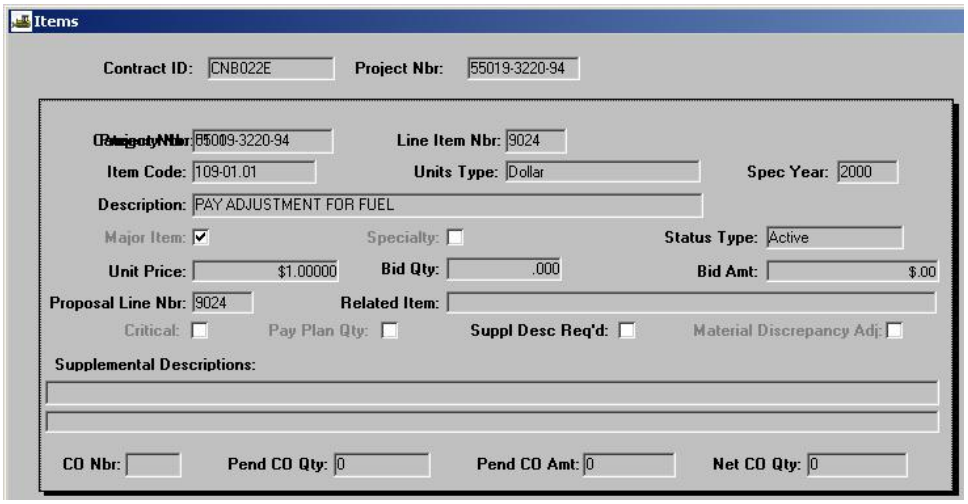
In the following exercise, you will review the Project Counties folder tab for Contract CNB022E. Participants should be logged on using the jj05751 ID in the INSP group.

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. Click the **Counties** folder tab.
2. What County is this project located in? **MCNAIRY**
3. Click the **Close** button on the toolbar.

Viewing Contract Items

The Items panel displays Items on the selected Contract and Project.



The Category field does not display properly in Inquiry mode. Since this is considered a minor bug, it will probably never be fixed.

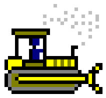
The Items Window

Figure 2-12

In TDOT, items known as “add-on” items are added to the contract before it is assigned to the Region. Add-On Items are denoted by Line Item Numbers, 9000 thru 9499. 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. Change Order Items are denoted by Line Item Numbers 9500 thru 9999.

Add-on Items will never have a Bid Quantity in the Contract Item window, because they are not bid on by the contractor.

The Major Item Indicator will be checked for those items determined to be major items during the contract activation process.



Exercise 2-12

In the following exercise, you will review an item for Contract CNB022E. Participants should be logged on using the jj05751 ID in the INSP group.

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

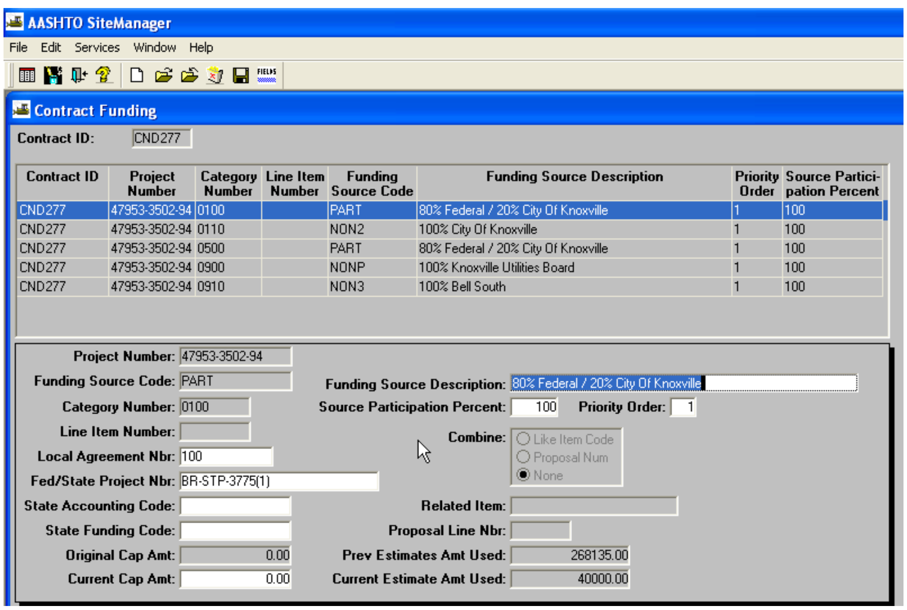
1. On the **Contract Records** panel, double-click the **Items** icon.
2. In the **Project** list box, scroll to and double-click Project **55019-3220-94**.
3. In the **Contract Item,** list box, scroll to and double-click Line Nbr **9024**, Category Nbr **0100.** Item Code **109-01.01,** Description **PAY ADJUSTMENT FOR FUEL**.

   This is an add-on item.
4. What is the Unit Price? **$1.00000**
5. What is the Bid Quantity? **.000**
6. Click the **Open** button.
7. In the **Contract Item,** list box, scroll to and double-click Line Nbr **0500**, Item Code **606-09.01,** Description **TEST PILES (PRECAST CONCRETE, SIZE 1)**.
8. What is the Unit Price? **$25.00000**
9. What is the Bid Quantity? **120.000**
10. Click the **Close** button.

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 datawindow. Data for the selected funding record is displayed in the bottom datawindow. If the User adds funding that does not match the funding selection on the Contract Description folder tab (i.e., Federal, State/Province, or Both), SiteManager automatically updates the Contract Description folder tab.

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.



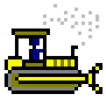
This screen shot shows a more complexly funded contract than the one we viewed in training. Direct students to look at this screen shot.

The Contract Funding Window

Figure 2-13

In TDOT, the Contract Funding window is loaded from PES and LAS.

The Category Number identifies the funding source and must be given attention when recording work in a DWR.



Exercise 2-13

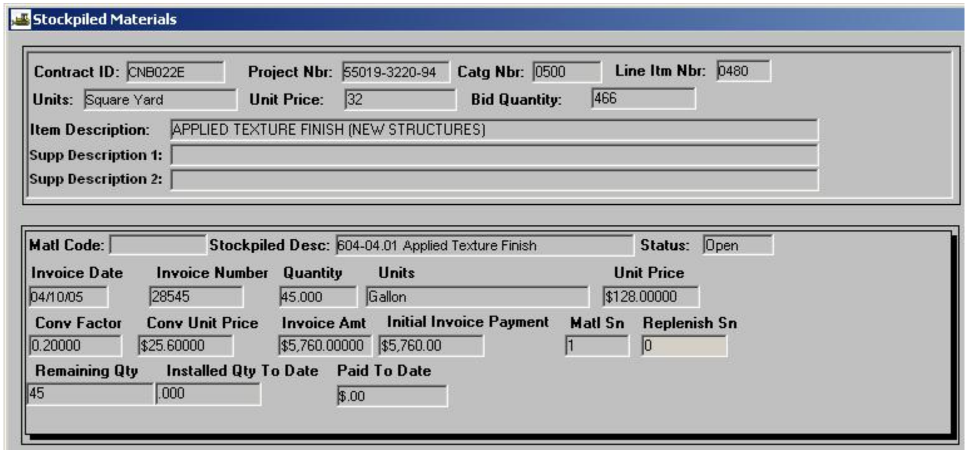
In the following exercise, you will view the Contract Funding window for Contract CNB022E.

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. On the **Contract Records** panel, double-click the **Contract Funding** icon.
2. Examine Figure 2-13 above.
3. Click the **Close** button.

Viewing Stockpiled Materials

The Stockpiled Materials panel lets the User select materials to be stockpiled for the Contract, and view invoice data for the materials. The panel displays Contract Line Item data in the top window and stockpiled material data in the bottom window. This data is used 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 panel. The estimate process also closes out the stockpiled material balance when the remaining quantity is zero, or an authorized User can close out the balance manually.



The Stockpiled Materials Window

Figure 2-14

In TDOT, the Project Supervisor and Office Staff will use the Stockpiled Materials window in SiteManager to track stockpiled materials.

Stockpiled material reductions or additions to the pay amount in the estimate are calculated and applied automatically through SiteManager. Details regarding stockpiled materials that have been applied to an estimate can be seen on the Line Item Adjustment window.

Exercise 2-14

In the following exercise, you will view a stockpiled material record for Contract CNB022E.

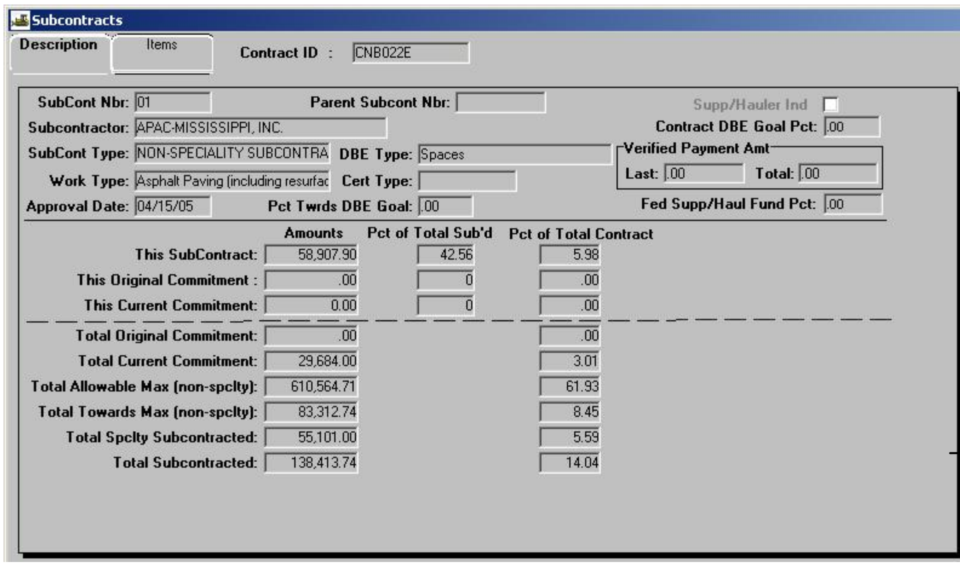
User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. On the **Contract Records** panel, double-click the **Stockpiled Materials** icon.
2. In the **Stockpiled Materials** pick list, double-click, Project Number **55019-3220-94,** Category Number **0500,** Line Item **0480**, Invoice Number **28545.**
3. What is the stockpile description? **604-04.01 Applied Texture Finish**
4. What is the Unit Price of the material? **$128.000**
5. What is the invoice amount? **$5,760.00**
6. What was the initial invoice payment? **$5,760.00**
7. What is the remaining quantity of the stockpile? **45.00**
8. Click the **Close** button.

Viewing a Subcontract

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

If a Subcontractor is not associated with contract items and *approved*, the Inspector will not be able to give the Subcontractor credit for installing work items on the Daily Work Report.



The Subcontracts Description Folder Tab

Figure 2-15

SiteManager defines "commitment" as DBE Commitment. Subcontracts that are not DBE are not included in the Commitment data.

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

Subcontract Descriptions

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

Nested subcontracts happen when a subcontractor subcontracts part of the work to another subcontractor. Nested subcontractors are referred to as 2nd, 3rd, etc. Tier Subcontracts at TDOT.

The percentage of the Subcontract that can be counted towards the Contract's DBE goal depends on the Subcontract's level, the Subcontractor's DBE status, and whether or not the Subcontract includes Items. A Parent Subcontract with a DBE Subcontractor and Items is always counted 100% towards the Contract's DBE goal. If the Subcontract has no Items (i.e., the Subcontractor is a supplier/hauler), the User enters the percentage counted towards the DBE goal. For nested Subcontracts, if a higher-level DBE Subcontract is counted 100% towards the DBE goal, the percentage of the nested Subcontract is always zero.

Exercise 2-15

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

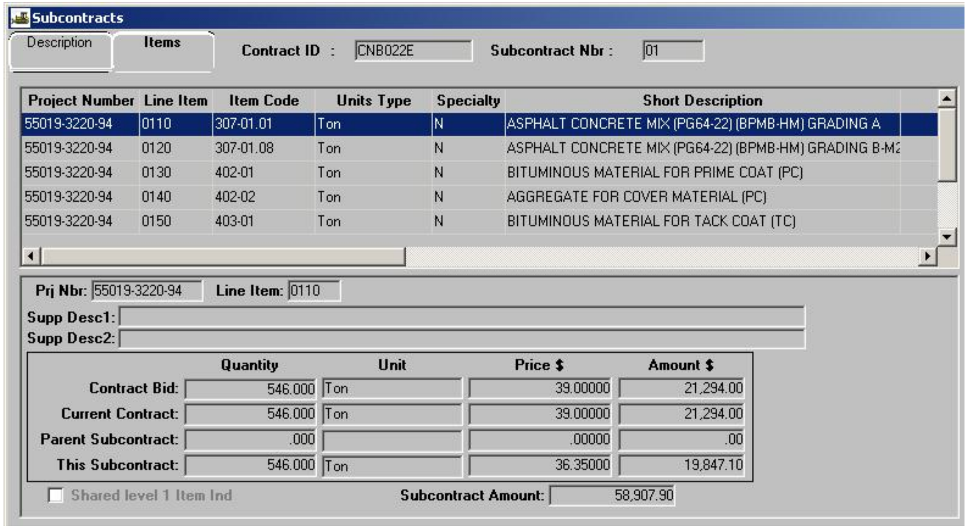
User ID: **jj05751**   Group: **INSP**   Contract: **CNB022E**

1. Click the **Contract Administration** folder tab.
2. On the **Contract Administration** panel, double-click the **Contractor Management** icon.
3. On the **Contractor Management** panel, double-click the **Subcontracts** icon.
4. How many subcontracts are there for this contract? **8**
5. How many subcontractors are DBE's for this contract? **2**
6. In the **Subcontract** list box, scroll to and double-click Subcontract Number **01 APAC-MISSISSIPPI, INC**.
7. What is the approval date for this subcontract? **04/15/05**
8. Is this a "nested" subcontract? **No, because the parent subcontract field is blank.**

Viewing Subcontract Items

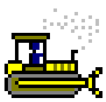
If a Subcontractor is associated with a contract but not qualified for the work item, the Inspector will not be able to give the Subcontractor credit for installing the work item on the Daily Work Report.

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



The Subcontracts Items Folder Tab

Figure 2-16



Exercise 2-16

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

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. Click the **Items** folder tab.
2. How many items are on this subcontract? **8**
3. What is the total quantity and dollar amount for Project Number **55019-3220-94**, Line Item **0110,** Item Code **307-01.01, ASPHALT CONCRETE MIX**?

   Quantity: 546.0 Amount: $19,847.10

4. Click the **Close** button.

Review for Section 2

To view a Contract's description:

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

To view a Contract location:

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

To view a Contract's payment data:

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

To view the Actual Date of a Contract Critical Date:

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

To view Primary Personnel for a Contract:

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

To view a Prime Contractor:

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

To view the DBE goal for a Contract:

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

To view a Milestone:

1. On the **Contract Records** panel, double-click the **Milestones** icon. The Milestone panel opens and a Contract select list is displayed.
2. In the **Contract ID** list box, scroll to and double-click the Contract. The Milestones for the selected Contract are displayed.

To view a Project on a Contract:

1. On the **Contract Records** panel, double-click the **Projects** icon. The Projects panel opens.
2. To select both a Contract and a Project, click the **Open** button. The Select Contract ID panel opens.
3. In the **Contract ID** list box, scroll to and double-click the Contract. The Projects for the selected Contract are listed.
4. In the **Project** list box, scroll to and click the Project.
5. Click **Ok**. The Projects panel opens with the Description folder tab displayed and data for the selected Project displayed in the fields.

To view a Project County:

1. On the **Contract Records** panel, double-click the **Projects** icon. The Projects panel opens.
2. To select both a Contract and a Project, click the **Open** button. The Select Contract ID panel opens.
3. In the **Contract ID** list box, scroll to and double-click the Contract. The Projects for the selected Contract are listed.
4. In the **Project** list box, scroll to and click the Project.
5. Click **Ok**. The Projects panel opens with the Description folder tab displayed and data for the selected Project displayed in the fields.
6. Click the **Project Counties** folder tab.

To view an Item on a Contract:

1. On the **Contract Records** panel, double-click the **Items** icon. The Items panel opens.
2. Click the **Open** button..
3. In the **Contract ID** list box, scroll to and double-click the Contract. The Projects for the selected Contract are listed.
4. In the **Project** list box, scroll to and click the Project.
5. In the **Item** list box, scroll to and click the Item.
6. Click **Ok**. The Items panel opens and displays 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 Stockpile Materials

1. On the **Contract Records** panel, double-click the **Stockpiled Materials** icon.
2. In the **Stockpile Material** pick list, double-click the stockpile materials.

To view a Subcontract:

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

To view an Item on a Subcontract:

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

Summary Exercise for Section 2

In the following exercise, you will review Contract CNB022F.

User ID: **jj05751** Group: **INSP** Contract: **CNB022F**

1. Navigate to the **Contracts** window.
2. Open Contract ID **CNB022F**.
3. What Region and Unit is this Contract assigned to? __**Region 4, Unit 042**__
4. What is the Work Type for this contract? __**Bridge Constr (new, widening, reconstr)**__
5. What is the Execution Date of the contract? __**3/25/05**__
6. What is the bonding company? __**BB&T – Thornton & Harwell**__
7. Navigate to the **Milestones** window.
8. What is the Original Milestone Completion date for Milestone **01** on **CNB022F**? __**7/15/05**__
9. Navigate to the **Projects** window.
10. How many projects are on this contract? __**Two**__
11. Navigate to the **Item**s window.
12. Open Contract **CNB022F,** Project **55019-3220-94,** Category **0500,** Line Item Number **0540,** Item Code **620-03.10 CONCRETE PARAPET**.
13. What is the Bid Quantity? __**254**__
14. Is it on a Change Order? __**No**__
15. Navigate to the **Contract Funding** window.
16. How many categories on project **55021-3214-94** are listed? __**Three**__
17. Navigate to the **Contractor Management** folder tab.
18. Open the **Subcontracts** window and open Subcontract **02** on **CNB022F**.
19. Who is the Subcontractor? __**International Traffic Systems, Inc.**__
20. Is this Subcontractor a DBE? __**No**__
21. Is this subcontractor approved to install Line Item **0610,** Item Code **730-50**? __**YES**__
22. Navigate to the **Main Panel**.

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Section 3 From Server to PM
for Field and Office Documentation

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

- Understand the Pipeline Process in SiteManager
- Download Data from the Server

Overview

Pipeline is the process that automates the transfer of data. SiteManager provides the Pipeline processes because Contract data must be downloaded and uploaded often during the life of a Contract. In general, the data downloaded from the Server is the Contract plan data, which is primarily the Contract specifications. The data uploaded to the Server is the Contract activity data, which is the work done on the Contract. Pipeline automates the data flow from the:

PM = Standalone

- Server to Standalone Mode (PM)
- Standalone Mode (PM) to Server

Pipeline The pipeline process transfers data files from one database to another. In SiteManager, the User uses the pipeline process to download data directly from the server's database to the standalone workstation's database, and to upload data directly from the standalone workstation's database to the server's database.

The following table shows how the Pipeline panels are used to transfer data.

Step	Activity	Process	Pipeline Panel
1	Download Basic Contract Data from the Server	The User selects and downloads basic contract data from the server's database to the standalone workstation's database using the Server to PM Pipeline panel. The Pipeline process loads the data directly into the User's standalone database. Before DWRs can be generated in Standalone mode, the User must download Basic Contract Data from the Server.	Server to PM Pipeline panel
2	Create Daily Work Reports	The User creates and modifies DWRs on the contract to report the usage of Labor, Equipment, and Items on the Contract.	As DWRs are created, they are listed on the DWR Select folder tab in the PM to Server window.
3	Upload Daily Work Reports to the Server	The User selects and uploads DWRs from the standalone workstation to the Server.	PM to Server Pipeline panel
4	View Pipeline History	The User can view a history of Pipeline activity.	Pipeline Information panel
5	Download Basic Contract Data and Daily Work Reports, as needed.	New data is added to the Contract on the Server only. The User downloads new Contract data as it becomes available. The new data updates the standalone database. The User can also download Daily Work Reports.	Download Basic Contract Data and Daily Work Reports as needed. NOTE: Basic Contract Data includes all Change Order information.
6	Release the Contract	When the Contract work is done, the User uses Pipeline to release the Contract back to the Server. On the Pipeline Summary panel, select the Basic Contract Data check box.	PM to Server Pipeline panel

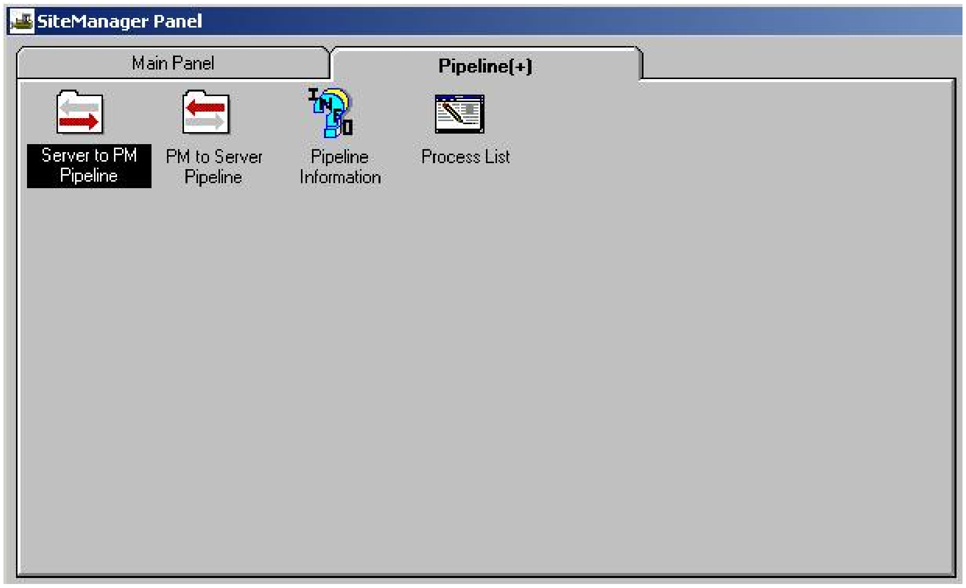
The Pipeline Process Table

Table 3-1

In TDOT, the Inspector must always check out Basic Contract Data when pipelining a contract to Standalone mode on his/her computer for the first time. It is required that the Basic Contract Data be pipelined to Standalone mode a minimum of twice a week to ensure that the Standalone database has the most current contract information.

The Pipeline Panel

When logging on to SiteManager, the User connects to either the standalone database or the server database, depending on which Pipeline function will be used.



The Pipeline Panel

Figure 3-1

Check Out — Downloading Data from the Server — PM

The Server to PM Pipeline panel lets the User download (check out) data from the server's database to the standalone workstation's database. To download Contract data from the Server, the User must first select a Contract.

To download Basic Contract Data, the User must check the Basic Contract Data box on the Server to PM Pipeline panel. Basic Contract Data includes all Change Order information. After the User has selected the data to download, the pipeline process is triggered by selecting the Pipeline Data menu option on the Services menu. For the data to download, the Contract must be in active status.

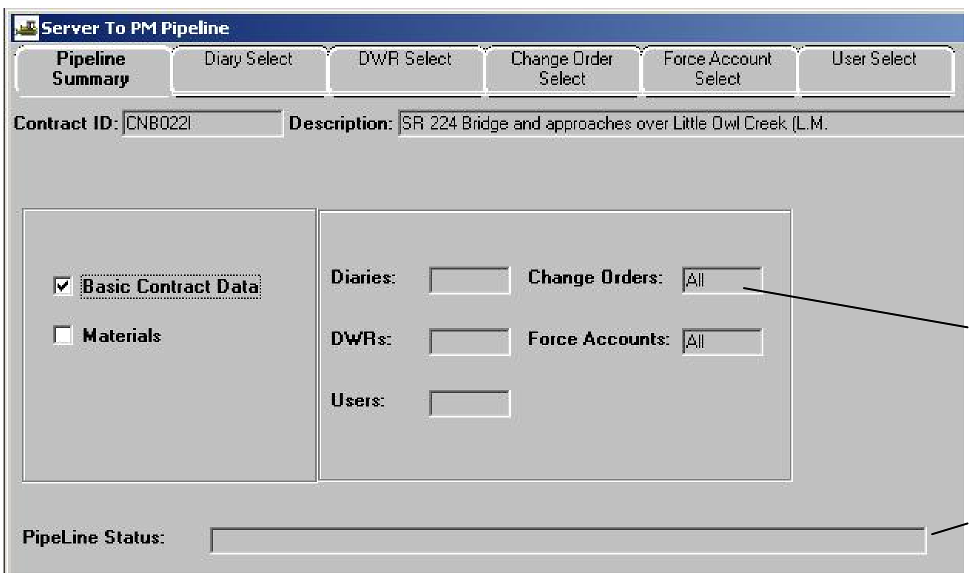
The pipeline process loads the Contract directly from the server database to the User's standalone database.

Contract work cannot be recorded in the field until the Basic Contract Data is downloaded.

Server to PM Pipeline Summary

On the Server to PM Pipeline window's Pipeline Summary folder tab, the user can view the number of Daily Work Reports, Diaries, Change Orders, Force Accounts, and Users selected. To see which ones are selected, the User clicks the appropriate folder tab.

The standalone workstations depend on periodic downloads from the Server for current data such as the results of estimates.



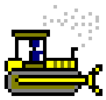
The Basic Contract Data includes all Change Orders.

The Pipeline Status field shows the activity and complete status of the pipeline process.

The Pipeline Summary Folder Tab

Figure 3-2

Note: TDOT will not use the Diary Select, Change Order Select, Force Account Select, or Users Select folder tabs.



Exercise 3-1

In the following exercise, you will select Contract CNB022I, browse the Server to PM Pipeline panels, and download the basic contract data.

User ID: **jj05751** Group: **INSP** Contract: **CNB022I**

Shift-tab if user ID not highlighted.

1. Double-click the **SiteManager Training** program icon on your desktop.
2. In the **User ID** field, type **jj05751**.
3. Press the **Tab** key.
4. In the **Password** field, type **pass**.
5. Press the **Enter** key.

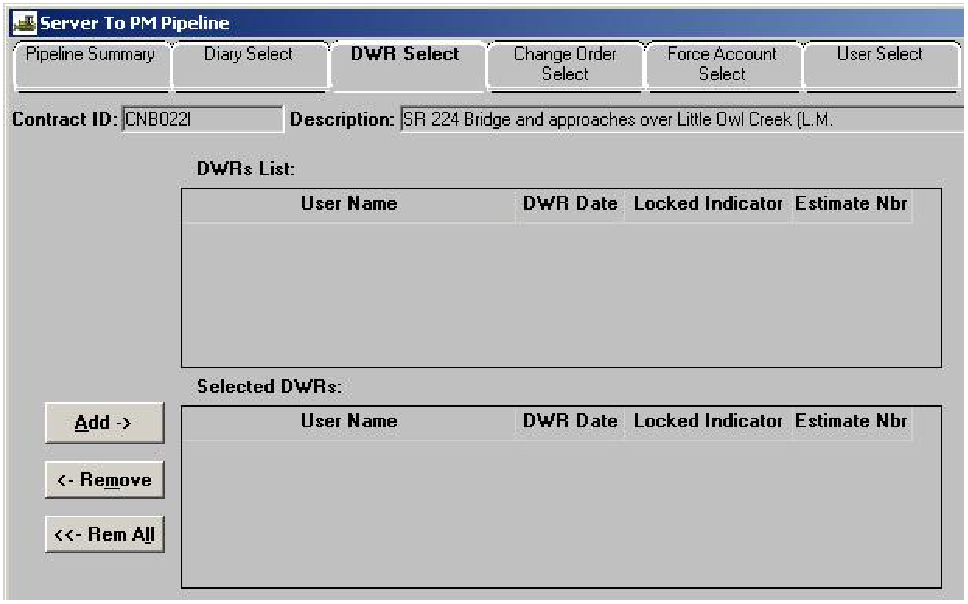
Now, let's browse to the Pipeline panel and open a contract.

6. On the **Main Panel**, double-click the **Pipeline** icon.
7. On the **Pipeline** panel, double-click the **Server to PM Pipeline** icon. SiteManager displays the Server to PM Pipeline window.
8. Click the **Open** button.
9. In the **Contract** list box, scroll to and double-click Contract **CNB022I**.
10. Click the **DWR Select** tab.
11. Click the **Change Order Select** tab.
12. Click the **Pipeline Summary** tab.
13. On the **Pipeline Summary** tab, click the **Basic Contract Data** check box (ON).
14. Click the **Services** menu and click **Pipeline Data**. The progress of the download is shown in the **Pipeline Status** field. A message confirms that the data is downloaded.
15. Click the **Close** button.

Basic Contract Data downloads all Change Orders and any other updates to the contract.

Selecting Daily Work Reports

When the User clicks the DWR Select folder tab on the Server to PM Pipeline panel, the panel displays a list of DWRs for the selected Contract. The User selects one or more DWRs to download.



The DWR Select Folder Tab

Figure 3-3

In TDOT, Inspectors may select DWRs from the DWR Select folder tab to download to Standalone mode for modification or review. DWRs must be pipelined back up to the server as soon as modifications have been completed.

Users who checkout an unauthorized DWR created by another user to his/her Standalone database must immediately check in the DWR so that it is available to the owner for modification, if necessary, or for inclusion in a Diary. A “view only” copy of the checked out DWR will remain in the Standalone database.

Daily Work Report Applicability

Daily Work Report data is transferred using the Pipeline function. To begin working on a Contract, the User must first download Basic Contract Data from the Server. ‘Basic Contract Data’ includes all of the Contract data required to process the DWRs, including Change Orders. After Contract work is underway, the DWRs are uploaded to the Server.

Pipeline is used to:

- Download Basic Contract Data from the Server
- Upload Daily Work Reports to the Server

Review for Section 3

To download data from the server:

1. When logging on to SiteManager, connect to the server database.
2. On the **SiteManager** main panel, double-click the **Pipeline** icon.
3. On the **Pipeline** panel, double-click the **Server to PM Pipeline** icon. The **Pipeline Summary** folder tab is displayed.
4. To select a Contract, click the **Open** button.
5. In the **Contract ID** list box, scroll to and double-click the Contract.
6. To download Basic Contract Data, click the **Basic Contract Data** check box (ON).
7. To select Daily Work Reports, click the **DWR Select** folder tab.
8. In the **DWR** list box, shift-click each Daily Work Report to be downloaded.
9. Click the **Add** button. The selected Daily Work Reports are added to the **Selected DWRs** list.
10. Click the **Pipeline Summary** folder tab. The panel displays the total number of Change Orders, Force Accounts, Diaries, Daily Work Reports, and Users selected.
11. To download the selected data from the Server, click the **Services** menu and click the **Pipeline Data** choice. The progress of the download is shown in the **Pipeline Status** field.

Summary Exercise for Section 3

In the following exercise, you will pipeline data from Contract CNB022K to Standalone mode.

User ID: **jj05751**   Group: **INSP**   Contract: **CNB022K**

1. For Contract **CNB022K**, download the Basic Contract Data from the Server.

2. Exit SiteManager.

Section 4 Daily Work Reports I

for Field and Office Documentation

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

- Understand the Basic Concepts of Daily Work Reports
- Enter Basic Daily Work Report Information
- Enter Contractor Activity
- Enter Contractor Equipment Activity
- Enter Daily Staff Activity
- Select and Record Work Items
- Record Work on a DWR Template

Daily Work Reports I

SiteManager will not allow two DWRs to be created by the same User for the same contract on the same day.

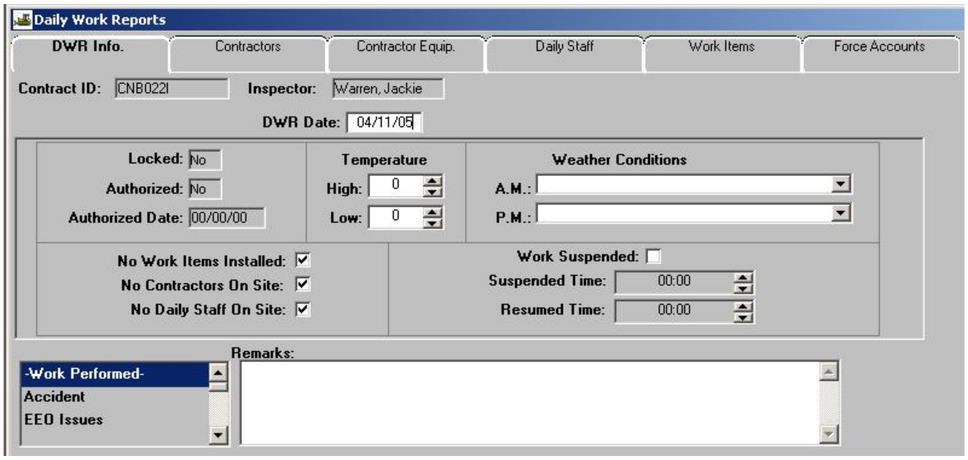
The User creates daily records of construction activity in Daily Work Reports. SiteManager lets the User create DWRs on the workstation in the field. Before the Inspector can create the first DWR for a Contract in standalone mode, the Basic Contract Data must be downloaded from the SiteManager Server database to the User's workstation. After the User pipelines the Basic Contract Data onto the workstation's local database, the User can begin creating DWRs in standalone. Typically, for each Contract, each User submits one DWR per day. Only the User who creates the DWR may modify it.

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

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

Choose 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.



The DWR Info Folder Tab

Figure 4-1

In TDOT, 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. DWRs may also be created by Office staff.

DWRs created by Inspectors will be created in Standalone Mode and DWRs created by Office Staff will be created in Server Mode.

Note: Inspectors should make sure the network cable is unplugged from the laptop when creating a DWR in Standalone Mode.

The Daily Work Reports window has the following folder tabs:

Contractors folder tab includes the Contractor's Supervisors/Foreman by name, which will not be used by TDOT.

Personnel Type is not an employee name, but rather a job title - Electrician, Driver or Heavy Equipment Operator. TDOT will record superintendent/foreman as personnel types.

DWR Info

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

Contractors

The Contractors folder tab lets the User enter daily data about the Prime and Subcontractor(s), Supervisor(s), and variable labor (by personnel type). TDOT will not use the Supervisor section of the window.

Contractors Equip

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

Daily Staff

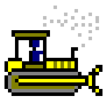
The Daily Staff folder tab lets the User enter daily information on state employees and consultants. Each entry shows how many hours the staff member worked.

Work Items

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

Force Accounts

TDOT will not use this feature.



Exercise 4-1

Jackie Warren (jj05751) is the Lead Inspector for all DWR/Diary exercises.

In the following exercise, you will log on in Standalone mode as the Lead Inspector and navigate to the Daily Work Reports window.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022I**

1. Double-click the **SiteManager Training** program icon on your desktop.
2. In the **User ID** field, type **jj05751**.

Shift-tab if the user ID is not highlighted.

3. Press the **Tab** key.
4. In the **Connect To** drop-down list, click the expand arrow to the right of the current selection and click **Training Standalone**.
5. In the **Password** field, type **pass**.
6. Press **Enter**.
7. On the **Main Panel**, double-click the **Daily Work Reports** icon.
8. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.

Entering Basic Daily Work Report Information

The DWR Info folder tab 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.

Locked = piped

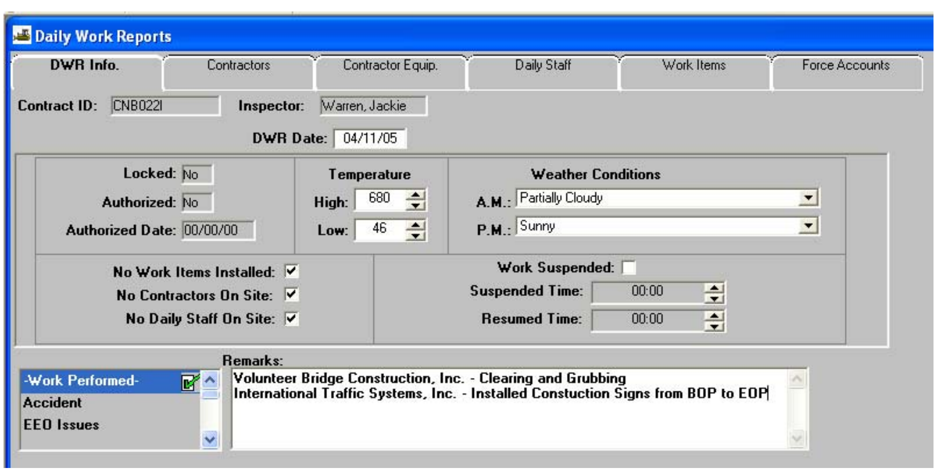
DWRs paid on an estimate cannot be changed, although locked indicator will be N.

Authorized = approved in Diary

This folder tab 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 checked by default. When the User enters data for the subject on another folder tab, the corresponding check box is cleared automatically.

Emphasize that they do not have to click these off if they enter data on the folder tabs.

General remarks are also recorded on this folder tab. 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.



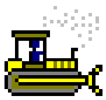
The DWR Info Folder Tab

Figure 4-2

In TDOT, field users are required to complete the DWR Date, Temperature, Weather Conditions, and appropriate Remarks ("Work Performed" at a minimum) on the project for the date of the DWR.

For the Remarks type "Work Performed", the field user should enter the contractor's name, details regarding the item work progress, and the location where the work is performed.

Same as now, equipment and personnel on next tabs.



Exercise 4-2

In the following exercise, you will create a new DWR and complete the DWR Info folder tab for April 11, 2005 on Contract CNB022I.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022I**

1. While on the **DWR Info.** folder tab, click the **Services** menu.
2. Click the **Choose Keys** choice.
3. In the **Contract ID** list box, scroll to and double-click Contract **CNB022I**.
4. In the **DWR Date** field, type **041105**.
5. Press the **Tab** key.

Now, let's add the temperatures and conditions.

6. In the **High Temperature** field, type **68** degrees.
7. In the **Low Temperature** field, type **46** degrees.
8. In the **A.M.** field, click the expand arrow to the right of the current selection and click **Partially Cloudy**.
9. In the **P.M.** field, click the expand arrow to the right of the current selection and click **Sunny**.

If temperatures are not entered correctly, the high temperature will display in both fields.

Now, let's add a few remarks.

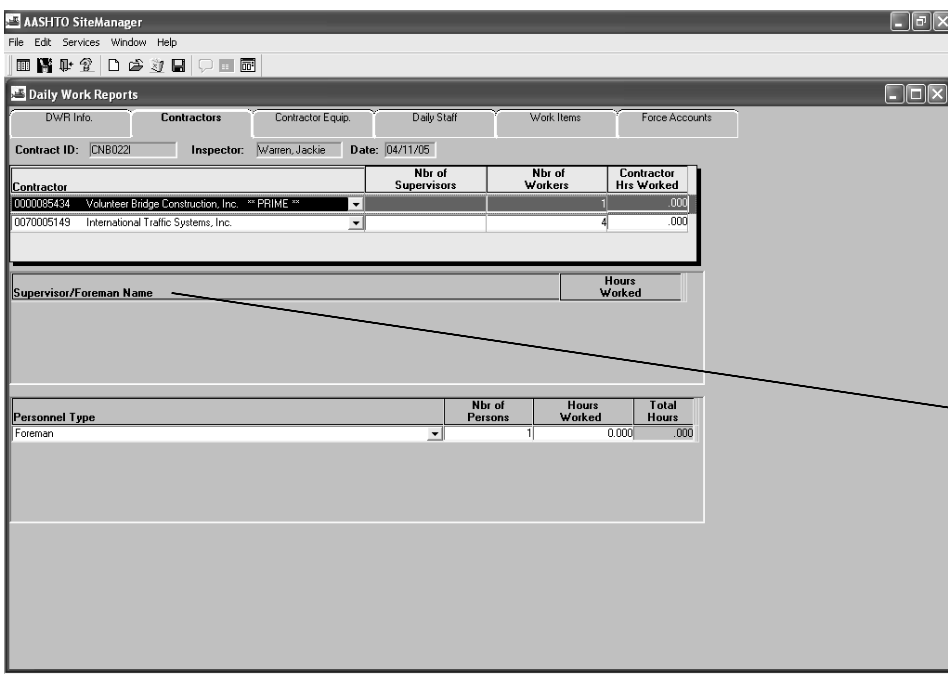
10. In the **Remarks Type** list box, scroll to and click **-Work Performed-**.
11. In the **Remarks** text box, type **Volunteer Bridge Construction, Inc**. **- Clearing and Grubbing.**
12. In the **Remarks** text box, type **International Traffic Systems, Inc**. **- Installed Construction Signs from BOP to EOP**.
13. In the **Remarks Type** list box, scroll to and click **Visitor**.
14. 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**.
15. Click the **Save** button.

Entering Contractor Activity

The Contractors folder tab in DWR lets the User enter daily data on the Contractor and variable labor (by personnel type). Equipment usage is recorded on the Contractors Equipment folder tab. The User can select the Contractor from a drop-down list of Contractors and Subcontractors who are authorized to work on the Contract. The Prime Contractor is always at the top of the drop-down list. The User must select a Contractor before recording installed work items. A minimum DWR that will impact an Estimate has a Contractor on-site and records installed work items.

Only Subcontractors associated with the Contract and approved for specific work items are accessible from the Contractor drop-down list.

After the User selects a Contractor, the User can select Personnel Types associated with the selected Contractor from the drop-down lists in the Personnel Type area. The records that appear on the drop-down lists are stored on the Contract's Master Lists. To add a record (supervisor, equipment, etc.) that does not appear on a drop-down list, a User must first add it to the Contract Master List from the Vendor Master List.



This is a three-focus window.

TDOT does not use the Supervisor/ Foreman Name section on the Contractor's tab.

The Contractors Folder Tab

Figure 4-3

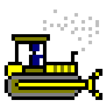
The Prime Contractor and Subcontractors

The Contractor drop-down list will contain the Prime Contractor and any qualified Subcontractors. The Prime Contractor will be the first contractor in the drop-down list.

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

If the Subcontractor does not have an approval date, it will not display.

In TDOT, all Contractors (Prime Contractors and Subcontractors) on site should be indicated on the Contractors folder tab of the DWR window. If the Subcontractor is on site, the User must indicate the Subcontractor in the Contractor area of the Contractors folder tab. If the Subcontractor is not on the drop-down list for this Contract, contact the Field Office so it may be added.



Exercise 4-3

In the following exercise, you will add a Prime Contractor and a Subcontractor to the DWR on April 11, 2005 for Contract CNB022I.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022I**

1. Click the **Contractors** folder tab
2. On the **Contractors** folder tab, click the **Contractor** area.
3. Click the **New** button. An empty row is added to the list.
4. In the **Contractor** drop-down list, click the expand arrow to the right of the current selection and click **Volunteer Bridge Construction, Inc**
5. Click the **Save** button.
6. Click the **New** button. An empty row is added to the list.
7. In the **Contractor** drop-down list, click the expand arrow to the right of the current selection and click **International Traffic Systems, Inc.**
8. Click the **Save** button.

Do not edit values in the Nbr of Supervisors or Nbr of Workers fields.

The Contractor Supervisor

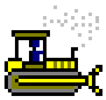
In TDOT, you will NOT use the Supervisor/Foreman section of the window. Instead all Supervisor/Foreman information will be recorded for each Contractor in the Personnel Type section of the Contractor folder tab.

The Contractor Personnel

The personnel drop-down list will contain personnel types added to the Contract Master List.

In TDOT, the User will record all Personnel Types on site for each Contractor indicated on the Contractor list. The Hours Worked field is not a required field and should remain blank. If any additional details are required, the User will enter the information in the Remarks field.

If the required Personnel Type is not on the drop-down list, contact the Field Office so it may be added to the DWR Master List.



Exercise 4-4

In the following exercise, you will add a personnel type to the contractor on site for the DWR on April 11, 2005 for Contract CNB022I.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022I**

1. On the **Contractors** folder tab, click the **International Traffic Systems, Inc.** contractor.
2. On the **Contractors** folder tab, click the **Personnel Type** area.
3. Click the **New** button. An empty row is added to the list.
4. In the **Personnel Type** drop-down list, click the expand arrow to the right of the current selection and click **Superintendent**.
5. In the **Nbr of Persons** field, type **1**.
6. Click the **New** button. An empty row is added to the list.
7. In the **Personnel Type** drop-down list, click the expand arrow to the right of the current selection and click **Foreman**.
8. In the **Nbr of Persons** field, type **1**.
9. Click the **New** button. An empty row is added to the list.
10. In the **Personnel Type** drop-down list, click the expand arrow to the right of the current selection and click **Truck Driver (2 axles)**.
11. In the **Nbr of Persons** field, type **1**.
12. Click the **New** button. An empty row is added to the list.
13. In the **Personnel Type** drop-down list, click the expand arrow to the right of the current selection and click **Unskilled Laborer**.
14. In the **Nbr of Persons** field, type **3**.
15. Click the **Save** button.

Now let's add personnel for another contractor.

16. On the **Contractors** folder tab, click the contractor **Volunteer Bridge Construction, Inc.**
17. Click the **Personnel Type** area.
18. Click the **New** button. An empty row is added to the list.
19. In the **Personnel Type** drop-down list, click the expand arrow to the right of the current selection and click **Foreman**.
20. In the **Nbr of Persons** field, type **1**.
21. Click the **Save** button.

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

Modifying Personnel Type Master List

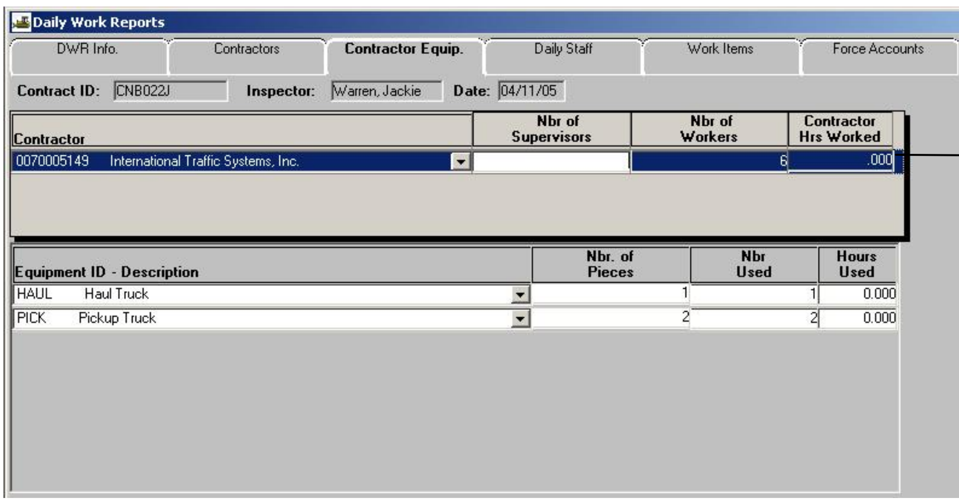
The Master List of personnel types is maintained for each Contractor on each Contract. The Master Lists are maintained by HQ Construction Office, while the Contract Master List is maintained by the Field Office.

As Subcontracts are added to the Contract, the Subcontractors personnel and equipment must be added to the master list to allow reporting of these in the DWR. *This process is included in the Contract Activation chapter of the Office Documentation Course.*

Entering Contractor Equipment Activity

The Contractor Equip folder tab lets the User document the presence and use of equipment on the job site for the selected Contractor. The user enters the number of pieces of each equipment type on the site on this date and the number of pieces used. User must select a Contractor before entering equipment information for the Contractor.

After the User selects a Contractor, the User can select Equipment IDs from the drop-down list in the Equipment ID - Description field. The records that appear on the drop-down list are stored in the Contractor's Contract Master List. To add a record that does not appear on the drop-down list, the User must first add it to the Contract Equipment Master List from the Vendor Master List.



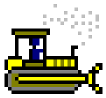
Do not edit values in the Nbr of Supervisors or Nbr of Workers fields. These fields are automatically populated.

The Contractor Equipment Folder Tab

Figure 4-4

In TDOT, the User will 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 4-5

In the following exercise, you will add equipment to the contractor on site for the DWR on April 11, 2005 for Contract CNB022I.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022I**

1. On the **Daily Work Reports** window, click the **Contractor Equipment** folder tab.
2. On the **Contractors** Equipment folder tab, click the **International Traffic Systems, Inc.**

May need to click in the Nbr of Pieces field first to activate drop-down list.

3. Click the **Equipment ID-Description** area.
4. Click the **New** button. An empty row is added to the list.
5. In the **Equipment ID-Description** drop-down list, click the expand arrow to the right of the current selection and click **Pickup Truck**.
6. In the **Nbr. of Pieces** field, type **2**.
7. In the **Nbr Used** field, type **2**.
8. Click the **New** button. An empty row is added to the list.
9. In the **Equipment ID** drop-down list, click the expand arrow to the right of the current selection and click **Haul Truck**.
10. In the **Nbr. of Pieces** field, type **1**.
11. In the **Nbr Used** field, type **1**.
12. Click the **Save** button.

Now let's add equipment for another contractor.

13. On the **Contractors Equipment** folder tab, click the **Volunteer Bridge Construction, Inc.**
14. Click the **Equipment ID-Description** area.
15. Click the **New** button. An empty row is added to the list.
16. In the **Equipment ID-Description** drop-down list, click the expand arrow to the right of the current selection and click **Pickup Truck**.
17. In the **Nbr. of Pieces** field, type **1**.
18. In the **Nbr Used** field, type **1**.
19. Click the **Save** button.

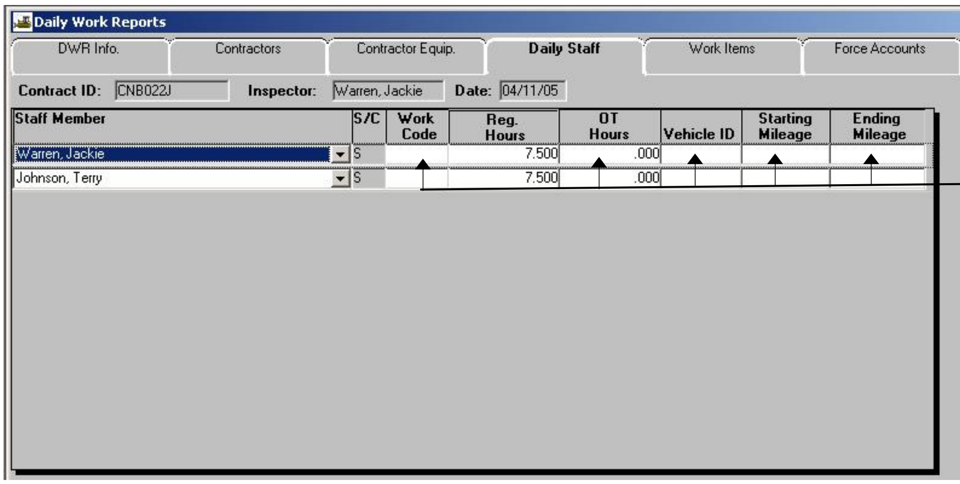
Modifying the Equipment Master List

A Master List of equipment is maintained for each Contractor on each Contract. The Master List is maintained by HQ Construction Office, while the Contract Master List is maintained by the field office.

As Subcontracts are added to the Contract, the Subcontractors personnel and equipment must be added to the master list to allow reporting of these in the DWR. *This process is included in the Contract Activation chapter of the Office Documentation Course.*

Entering Daily Staff Activity

The Daily Staff folder tab lets the User enter daily information on state employees and consultants. Each entry shows how many hours the staff member worked. The User selects staff members from the drop-down list in the Staff Member field. The User may also enter remarks for each line of Daily Staff recorded. The Staff Members that appear on the drop-down list are stored in the Contract Master List. Staff Members that do not appear on the drop-down list must first be added to the Contract Master List.



In TDOT, these five fields remain blank.

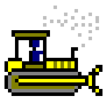
The Daily Staff Folder Tab

Figure 4-5

In TDOT, the Project 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 folder tab.

Staff Hours Custom Report will show TDOT Staff and hours so you can transfer the data to the time card. Information regarding consultants can be viewed by running the Consultant Hours Custom Report.



Exercise 4-6

In the following exercise, you will add TDOT Daily Staff to the DWR on April 11, 2005 for Contract CNB022I.

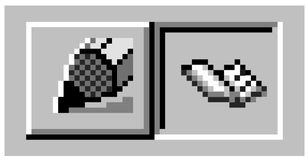
User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022I**

1. On the **Daily Work Reports** window, click the **Daily Staff** folder tab.
2. Click the **New** button. An empty row is added to the list.
3. In the **Staff Member** drop-down list, click the expand arrow to the right of the current selection and click **Warren, Jackie**.
4. In the **Reg. Hours** field, type **7.5**.
5. Click the **New** button. An empty row is added to the list.
6. In the **Staff Member** drop-down list, click the expand arrow to the right of the current selection and click **Johnson, Terry**.
7. In the **Reg. Hours** field, type **7.5**.
8. Click the **Save** button.
9. Click the **Work Items** folder tab.

Selecting and Recording Work Items

Contractor must be entered first.

The Work Items folder tab lets the User view and add daily usage data for installed Work Items. Before entering Work Item data, the Contractor responsible for the Work Item must be entered on the Contractors folder tab. When the User first selects the Work Items folder tab, the Select Work Item list is displayed. The *Record Work Item* and *Selects Work Item* buttons let the User toggle between two different versions of the Work Items folder tab. 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 folder tab on which the User can view and add daily usage data.

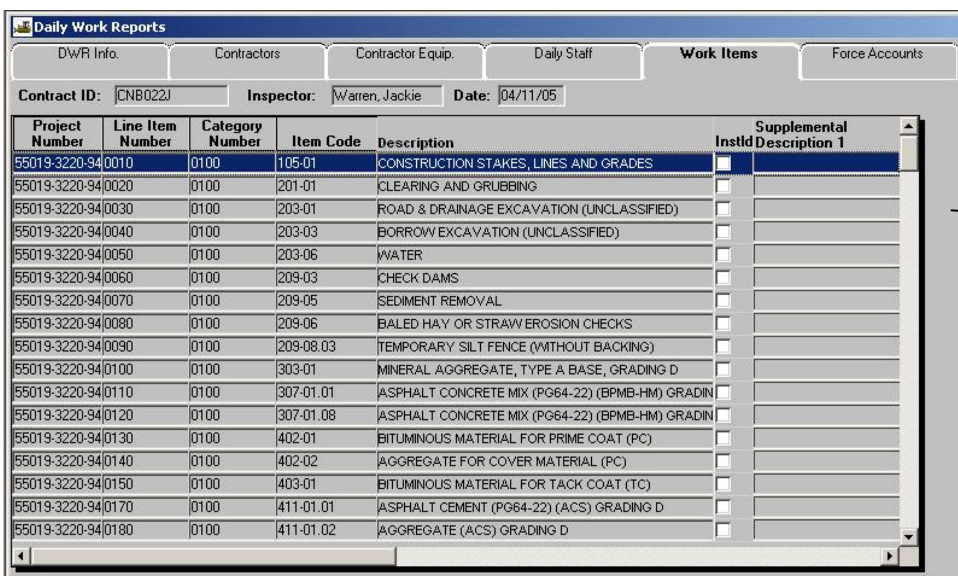


The Record Work Item and Selects Work Item Buttons

Figure 4-6

The User can toggle between two different versions of the Work Items folder tab. When the User first selects the Work Items folder tab, or when the Selects Work Item button is clicked, the Select Work Items folder tab 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 checked (ON).

Since this training software was developed in an earlier version of SiteManager, this screen may look slightly different when you are actually working in the system. For example, the Instld Column is now on the far left and there is a new Category Description column.

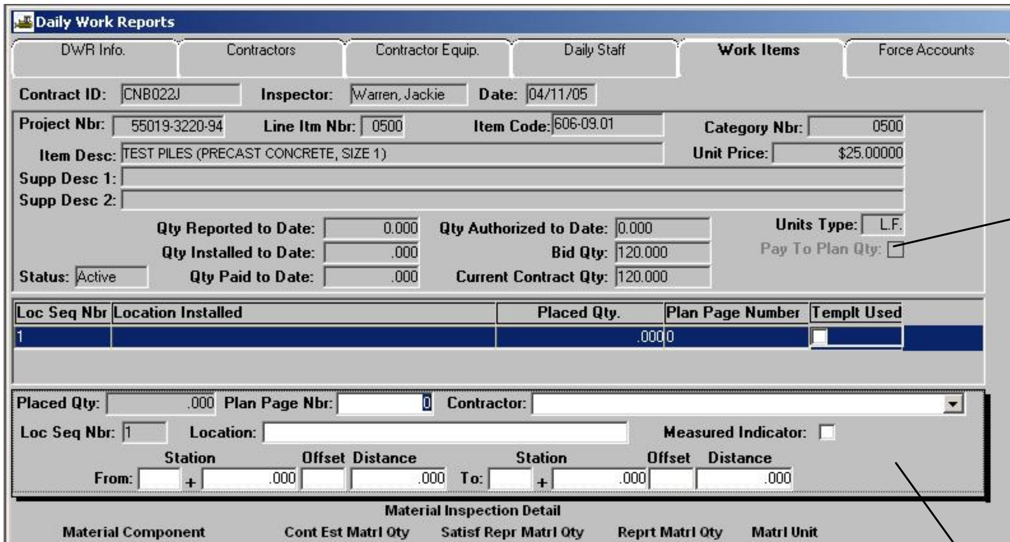


Project Number	Line Item Number	Category Number	Item Code	Description	Instld	Supplemental Description 1
55019-3220-94	0010	0100	105-01	CONSTRUCTION STAKES, LINES AND GRADES		
55019-3220-94	0020	0100	201-01	CLEARING AND GRUBBING		
55019-3220-94	0030	0100	203-01	ROAD & DRAINAGE EXCAVATION (UNCLASSIFIED)		
55019-3220-94	0040	0100	203-03	BORROW EXCAVATION (UNCLASSIFIED)		
55019-3220-94	0050	0100	203-06	WATER		
55019-3220-94	0060	0100	209-03	CHECK DAMS		
55019-3220-94	0070	0100	209-05	SEDIMENT REMOVAL		
55019-3220-94	0080	0100	209-06	BALED HAY OR STRAW EROSION CHECKS		
55019-3220-94	0090	0100	209-08.03	TEMPORARY SILT FENCE (WITHOUT BACKING)		
55019-3220-94	0100	0100	303-01	MINERAL AGGREGATE, TYPE A BASE, GRADING D		
55019-3220-94	0110	0100	307-01.01	ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADIN		
55019-3220-94	0120	0100	307-01.08	ASPHALT CONCRETE MIX (PG64-22) (BPMB-HM) GRADIN		
55019-3220-94	0130	0100	402-01	BITUMINOUS MATERIAL FOR PRIME COAT (PC)		
55019-3220-94	0140	0100	402-02	AGGREGATE FOR COVER MATERIAL (PC)		
55019-3220-94	0150	0100	403-01	BITUMINOUS MATERIAL FOR TACK COAT (TC)		
55019-3220-94	0170	0100	411-01.01	ASPHALT CEMENT (PG64-22) (ACS) GRADING D		
55019-3220-94	0180	0100	411-01.02	AGGREGATE (ACS) GRADING D		

The Select Work Items Folder Tab

Figure 4-7

When the Record Work Item button is clicked, the Record Work Items window displays usage information on the selected Item for the DWR. The Record Work Items window allows the User to view existing data for the Work Item or add new usage data.



The Record Work Items Folder Tab

Figure 4-8

TDOT is not using Pay To Plan Qty.

Again, this screen may look slightly different when you get back to your office. An As Built Qty field is now directly below Placed Qty which TDOT does not plan to use. Also the Measured Indicator is displayed different.

The Record Work Items window displays the following Item information:

- Qty Reported to Date – Total quantity reported on DWRs.
- 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.

In TDOT, it is important to select the appropriate Category when documenting installed quantities on an item if that item exists in more than one Category. 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*. If there are any questions concerning funding or if a Category needs to be added, please contact the Headquarters Finance Office.

In TDOT, on the Record Work Items folder tab, the Placed Quantity, Contractor and Location are required information for each location sequence number. TDOT will NOT use the As Built Qty field. Only the Prime Contractor and subcontractors approved to work on the work item can be selected as the Contractor. If more than one contractor (prime or sub) performs work on the same Placed Quantity, the contractor performing most of the work should be selected. While subcontractors may perform work on Add-On Items (non-bid items added with a quantity of zero and a line item number of 9000-9499), these must be recorded against the Prime Contractor because they will not appear as subcontracted items. If the Placed Qty is not editable, a DWR template is required. The Station Number fields should be used (if appropriate) for that item.

In TDOT, installed work items from the DWRs *authorized* in the Diary window are used by the Contractor Payments component of SiteManager as the basis for paying the Contractor in an Estimate.

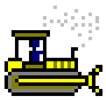
A minimum TDOT DWR in SiteManager that reports installed quantities must include:

- **The weather conditions**
- **The Work Performed remark, including the name of the contractor performing the work**
- **The Contractor reported on the site, including personnel and equipment**
- **The quantities at the item level that were installed**
- **The location where the items were installed**

Item Types	Participating Categories	Non-Participating Categories
Roadway Items	0100	0110 - 0190
Box Bridge Items	0300	0310 - 0390
Bridge Items	0500	0510 - 0590
Maintenance & Other Items	0700	0710 - 0790
Utility Items	0900	0900 - 0990
Alternate Bid Items	>1100	

TDOT Categories

Table 4-1



Exercise 4-7

In the following exercise, you will record the details of a work item for the Prime Contractor for the DWR on April 11, 2005 for Contract CNB022I.

User ID: **jj05751**   Group: **INSPST**   Mode: **Standalone**   Contract: **CNB022J**

1. Scroll to and select Project Nbr **55019-3220-94**, Line Item Number **0020**, Category Number **0100,** Item Code **201-01**, Description **CLEARING AND GRUBBING**.
2. Click the **Record Work Item** button. SiteManager displays the info on the **Work Items** panel.

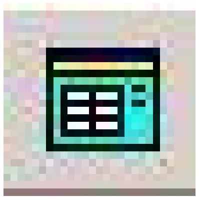
Now, let's enter the information about that work item.

3. Click the **New** button.
4. In the **Placed Qty** field, type **0.20**
5. In the **Contractor** drop-down list, click the expand arrow and click **Volunteer Bridge Construction, Inc**.
6. In the **Location** field, type **Grey Road**.
7. Click the **Save** button.
8. Click the **Selects Work Item** button to return to the contract item list.

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.

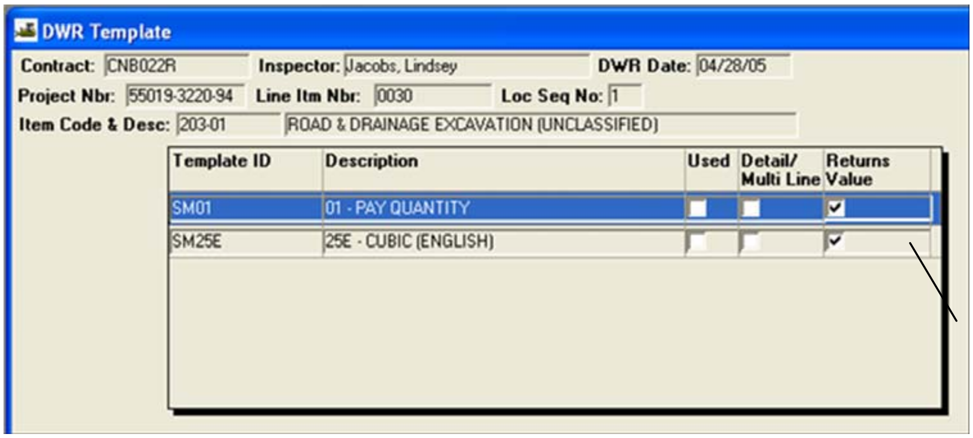
Any DWR Templates associated to the selected Item are available from the DWR Template window for viewing or entering data. The DWR Template panel is accessed with the DWR Template button. If the item requires the use of a template, the DWR Template panel automatically displays when the work item location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



The DWR Template Button

Figure 4-9

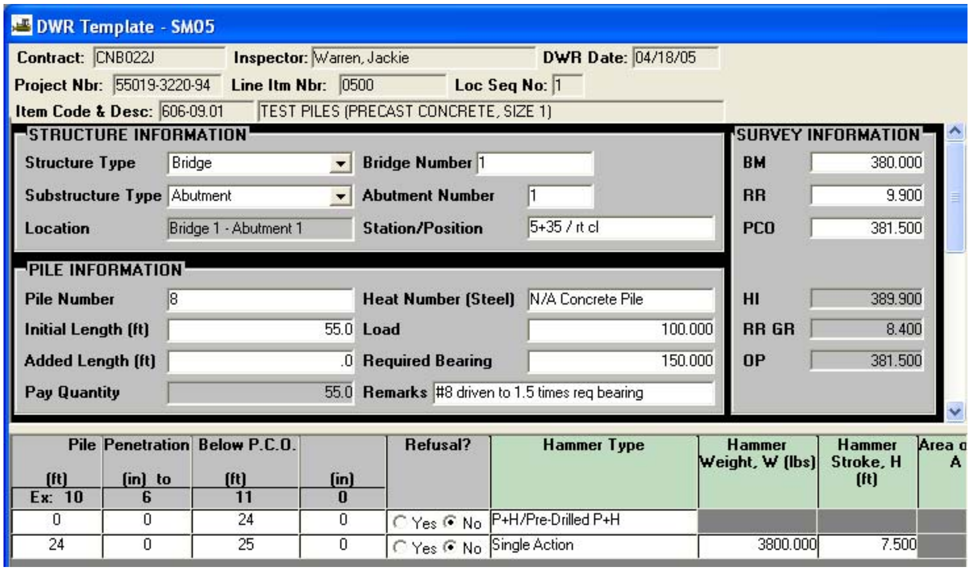
The DWR Templates panel displays a list of the DWR Templates available for use with this Work Item. The user chooses which DWR Template associated to the selected Item to view or record data to. Once the DWR Template has been chosen the User can enter data into the template.



This screen does not match the data in the training exercise, but does reflect the use of the SM01 template.

The DWR Template Panel

Figure 4-10


DWR Template - SM05

Contract: CNB022J Inspector: Warren, Jackie DWR Date: 04/18/05
Project Nbr: 55019-3220-94 Line Itm Nbr: 0500 Loc Seq No: 1
Item Code & Desc: 606-09.01 TEST PILES (PRECAST CONCRETE, SIZE 1)

STRUCTURE INFORMATION
Structure Type: Bridge
Bridge Number: 1
Substructure Type: Abutment
Abutment Number: 1
Location: Bridge 1 - Abutment 1
Station/Position: 5+35 / rt cl

SURVEY INFORMATION
BM: 380.000
RR: 9.900
PCO: 381.500
HI: 389.900
RR GR: 8.400
OP: 381.500

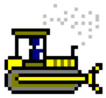
PILE INFORMATION
Pile Number: 8
Heat Number (Steel): N/A Concrete Pile
Initial Length (ft): 55.0
Load: 100.000
Added Length (ft): .0
Required Bearing: 150.000
Pay Quantity: 55.0
Remarks: #8 driven to 1.5 times req bearing

Pile (ft)	Penetration (in) to	Below P.C.O. (ft)	(in)	Refusal?	Hammer Type	Hammer Weight, W (lbs)	Hammer Stroke, H (ft)	Area o A
Ex: 10	6	11	0					
0	0	24	0	Yes No	P+H/Pre-Drilled P+H			
24	0	25	0	Yes No	Single Action	3800.000	7.500	

The DWR Template

Figure 4-11

TDOT has developed a number of SiteManager DWR Templates similar to the forms currently used for calculating and recording item quantities.



Exercise 4-8

In the following exercise, you will use a DWR template to record a placed quantity to the DWR on April 11, 2005 for Contract CNB022I.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022J**

1. Scroll to and select Project Nbr **55019-3220-94**, Line Item Number **0310**, Category Number **0100,** Item Code **712-06**, Description **SIGNS (CONSTRUCTION)**.
2. Click the **Record Work Item** button. SiteManager displays the info on the **Work Items** panel.

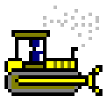
Now, let's enter the information about the work item.

3. Click the **New** button.
4. Why is the Placed Qty field gray and un-editable for this item?
   DWR Template Required
5. In the **Contractor** drop-down list, click the expand arrow and click **International Traffic**
6. In the **Location** field, type **BOP to EOP**.
7. Click the **Save** button. SiteManager displays the DWR Template window.
8. What is the title of the window that displayed when the save button was clicked?
   DWR Template
9. Double-click Template ID **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 **40.**
15. Press the **Tab** key.
16. What is displayed in the **Pay Quantity** field? **400.0**
17. Click the **Save** button.
18. Click the **Close** button.
19. Click the **Remarks** button.
20. In the **Remarks** box, type **this is an example Remark**.
21. Click the **Remark** button to close the Remarks window.
22. Click the **Save** button.
23. Click the **Selects Work Item** button to return to the contract item list.

Point out the lines displayed on the Remarks button.

Template 22A has been revised since this training was originally developed. There are actual fields on this template now for remarks.

This step demonstrates the Select Work Item button.



Exercise 4-9

Exercise setup: It is one week later, and users are opening a DWR that was created earlier in the day to record placed quantity totals.

In the following exercise, you will record the details of a work item for the Prime Contractor for the DWR on April 18, 2005 for Contract CNB022J.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022J**

First, let's open an existing a DWR.

1. On the **Daily Work Reports** window, click the **DWR Info** folder tab.
2. Click the **Open** button.
3. In the **Contract ID** select box, click the **Contract ID** button to change the focus of the window.
4. From the **Contract ID** select list, double-click Contract ID **CNB022J**.
   Note: changing to contract J
5. From the **Inspector** select list, double-click User ID **jj05751** (**Warren, Jackie**).
6. From the **Date** select list, double-click DWR Date **04/18/05**.
7. The DWR will open. Review the details on the **DWR Info** folder tab.

Now, let's add a remark.

8. In the **Remarks Type** list box, scroll to and click **Work Performed**.
9. In the **Remarks** text box, type **Volunteer Bridge Construction, Inc**. **- Test pile driven at 2:30 PM**.
10. Click the **Save** button.

Now, let's review some more of the information on this DWR.

11. Click the **Contractors** folder tab. Was the Prime Contractor on-site? **Yes - Volunteer Bridge Construction, Inc**
12. Click the **Contractor Equip.** folder tab. How many pieces of equipment are listed on this DWR? **Five types (7 total pieces)**
13. Click the **Daily Staff** folder tab. How many agency staff members were on site **Five**

Now, let's record a new work item.

14. Click the **Work Items** folder tab.
15. Scroll to and select Project Nbr **55019-3220-94**, Line Item Number **0500**, Category Number **0500,** Item Code **606-09.01**, Description **TEST PILES (PRECAST CONCRETE, SIZE 1)**.
16. Click the **Record Work Item** button. SiteManager displays the info on the **Work Items** panel.

The purpose of this exercise is to show a multi-line template as opposed to a regular template used in the previous exercise.

Now, let's enter the information about that work item.

17. Click the **New** button.
18. Why is the Placed Qty field gray and un-editable for this item?
    DWR Template Required
19. In the **Plan Page Nbr**. field, type **6**.
20. In the **Contractor** drop-down list, click the expand arrow and click **Volunteer Bridge Construction, Inc**.
21. In the **Location** field, type **Abutment #1, Column B, Footing A**.
22. In the **Station From** fields, type **5 + 25 LT 45**.
23. In the **Station To** fields, type **5+ 50 RT 45**.
24. Click the **Save** button. SiteManager displays the DWR Template window.
25. What is the title of the window that displayed when the save button was clicked?
    DWR Template
26. In the DWR Template list box, scroll to and click Template ID **SM05, 05-TEST PILING (ENGLISH)**.
27. Click the **Record Template Data** button.

Provide enough detail in the Location field so that it is easy for others to interpret.

If using any of the station fields, the others may not be left blank.

We need to save this information, but be prepared; clicking Save will open the DWR Template window.

Now, let's enter the structure information.

28. In the **Structure Type** field, click the drop-down arrow and click **Bridge**.
29. In the **Bridge Number** field, type **1**.
30. In the **Substructure Type** field, click the drop-down arrow and click **Abutment**.
31. In the **Abutment Number** field, type **1**.
32. In the **Station/Position** field, type **5+35 / RT CL**.
33. What is automatically populated in the Location field?
    Bridge 1 - Abutment

Now, let's enter the survey information

34. In the **BM** field, type **380.000**.
35. In the **RR** field, type **9.9**.
36. In the **PCO** field, type **381.50**.
37. Notice the Survey Info fields HI, RRGR, and OP fields were automatically populated.

Remaining portion of template exercise is in detail section of the template. Remind students to be careful of place holder zeros.

Now, let's enter the pile information.

Users MUST TYPE THE ZEROS like in the number ten even if it appears that the zeros are there already.

38. In the **Pile Number** field, type **8**.
39. In the **Initial Length (ft)** field, type **55.0**.
40. In the **Added Length (ft)** field, type **0**.
41. Note the **Pay Quantity** field is automatically populated.
42. In the **Heat Number (Steel)** field, type **N/A – Concrete Pile**.
43. In the **Load** field, type **100**.
44. In the **Required Bearing** field, type **150**.
45. In the **Remarks** field, type **#8 driven to 1.5 times req bearing**.
46. Click the **Save** button.

Now, let's record the pile penetration below P. C. O. as 0 feet 0 inches to 24 feet 0 inches.

Remind users to press the Tab key to move between fields.

47. Under the **(ft)** label, verify **0**.
48. Under the **(in) to** label, verify **0**.
49. Under the **(ft)** label, type **24**.
50. Under the **(in**) label, verify **0**.
51. In the **Refusal?** field, verify the **No** radio button is selected (ON).
52. Click in the **Hammer Type** field and click **P+H/Pre-Drilled P+H**.
53. Click the **Save** button.

Users need to click the New button each time they enter a new data set.

Now, let's continue the driving log:

54. Click the **New** button.
55. In the **(ft)** field, type **24**.
56. In the **(in) to** field, verify **0**.
57. In the **(ft)** field, type **25**.
58. In the **(in**) field, verify **0**.
59. In the **Refusal?** field, verify the **No** radio button is selected (ON).
60. In the **Hammer Type** field, click the expand arrow and click **Single Action**.
61. In the **Hammer Weight, W (lbs)** field, type **3800**.
62. In the **Hammer Stroke, H (ft)** field, type **7.5**.
63. Press the **Tab** key.
64. What is automatically populated in the **Penetration (in)** field? **12.000**
65. In the **Number of Blows** column, type **100**.
66. What is automatically populated in the **Bearing (tons)** field? **129.545**
67. Click the **Save** button.
68. What is the Pay Quantity? **55.0**

Now, let's view the results of using the template.

69. Click the **Close** button.
70. What has been populated in the **Placed Quantity** field? **55.0**
71. Click the **Save** button.
72. Click the **DWR Info.** tab.
73. To prepare for the summary exercise, click the **New** button.

Set up for summary exercise: to prevent students from getting the "copy" message.

Review for Section 4

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 Info folder tab:

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. Press the **Tab** key.
6. In the **Low Temperature** field, click the spin button to advance to or type the correct temperature.
7. Press the **Tab** key.
8. In the **A.M.** field, type the prevailing weather conditions for the A.M. hours of the work period.
9. Press the **Tab** key.
10. In the **P.M.** field, type the prevailing weather condition for the P.M. hours of the work period.
11. 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.
12. Click the **Save** button.

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. Click the **Save** button.
6. Click the **Contractors** folder tab.
7. Modify the Contractor data appropriately.
8. Click the **Save** button.

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. Click the **Save** button.
6. Click the **Contractors** folder 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** drop-down list, click the expand arrow and click the desired personnel type.
10. Press the **Tab** key.
11. In the **Nbr of Persons** field, type the number of workers of this Personnel Type who worked on this date.
12. Click the **Save** button.

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. Click the **Save** button.
6. Click the **Contractors** folder tab.
7. Add the contractor who supplied the equipment.
8. Click the **Save** button.
9. Click the **Contractor Equipment** folder 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** drop-down list, click the expand arrow and click the desired equipment ID.
13. Press the **Tab** key.
14. In the **Nbr of Pieces** field, type the number of pieces of this equipment present on this date.
15. Press the **Tab** key.
16. In the **Nbr Used** field, type the number of pieces of this equipment used on this date.
17. Click the **Save** button.

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** folder tab.
5. Click the **New** button on the toolbar.
6. In the **Staff Member** drop-down 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. Click the **Save** button.

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. Click the **Save** button.
6. Click the **Contractors** folder tab.
7. Add the contractor who installed the work item(s).
8. Click the **Save** button.
9. Click the **Work Items** folder 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. Press the **Tab** key.
15. In the **Plan Page Nbr** field, type the page number of a reference to the installed item.
16. In the **Contractor** drop-down list, click the expand arrow and click the name of the Contractor responsible for the installed item.
17. Press the **Tab** key.
18. In the **Location** field, type the location where the item was installed.
19. In the **From Station** field, type the Station ID that identifies where the installation of this Work Item starts.
20. Press the **Tab** key.
21. In the **From Station Offset** field, type the offset from the Station ID that identifies where the installation of this Work Item starts.
22. Press the **Tab** key.
23. In the **From Station Distance** field, type the offset distance from the Station ID that identifies where the installation of this Work Item starts.
24. Press the **Tab** key.
25. In the **To Station** field, type the Station ID that identifies where the installation of this Work Item ends.
26. Press the **Tab** key.
27. In the **To Station Offset** field, type the offset from the Station ID that identifies where the installation of this Work Item ends.
28. Press the **Tab** key.
29. In the **To Station Distance** field, type the offset distance from the Station ID that identifies where the installation of this Work Item ends.
30. Click the **Save** button.
31. Repeat steps 12-31 for additional locations where the work item was installed on this workday.
32. 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. Click the **Save** button or select **Save** from the **File** menu when the data is fully entered into the Template.
5. Click the **Close** button or select **Close** from the **File** menu to return to the Record Work Item window. The **Placed Qty** field is now populated with the value from the DWR Template and the **Templt Used** box is checked.

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”

Summary Exercise for Section 4

In the following exercise, you will create a DWR for **April 19, 2005** for Contract **CNB022J** using the information provided below.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022J**

Weather conditions:

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

Remarks:

- Work Performed: **Volunteer Bridge installed 18" RCP at station 16+75 RT Centerline.**

Personnel:

- **Foreman – 1**
- **Class "B" Operator – 2**
- **Class "D" Operator – 1**
- **Truck Driver (3/4 axels) – 2**

Equipment (on site and used)

- **Backhoe/Hydraulic Excav - 1**
- **Pickup Truck – 3**
- **Bull Dozer – 1**
- **Bobcat – 1**
- **Haul Truck – 2**

Daily Staff

- **Warren, Jackie** – **7.5** hours
- **Johnson, Terry – 7.5 hours**

Items:

1. **Item Code 204-07, BEDDING MATERIAL (PIPE) CLASS B (Project 55021-3214-94, Line Item Nbr 0643, Category Number 0100)**:
   - Plan Page Nbr: **4A**
   - Contractor: **Volunteer Bridge Construction, Inc.**
   - Location: **Station 16+75 RT Centerline**
   - Template **SM10E**
   - Culvert Type: **Concrete Pipe**
   - Pipe Diameter **(in): 18**
   - Length **(ft): 50.000**

   What is the pay quantity for this item?______________________**10.6**____________________

2. **Item Code 607-39.02, 18" PIPE CULVERT (Project 55019-3220-94, Line Item Nbr 0200, Category Number 0100):**
   - Contractor: **Volunteer Bridge Construction, Inc.**
   - Location: **Station 16+75 RT Centerline**
   - Placed Quantity**: 50**

When complete, navigate to the **Daily Work Reports** panel.

Section 5 Daily Work Reports II
for Field and Office Documentation

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

- Copy a Daily Work Report
- Modify a Daily Work Report

Copying a Daily Work Report

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

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

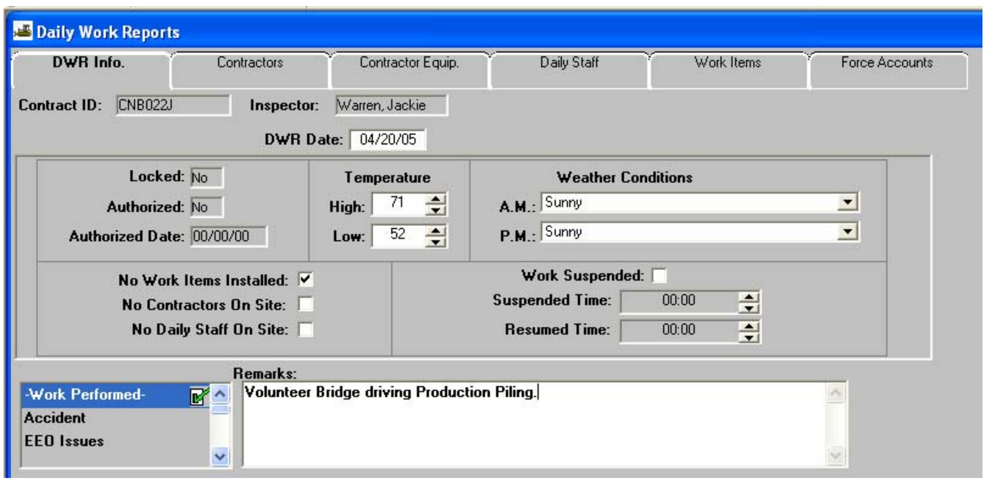
A copied DWR will not include the following data from the original Daily Work Report:

- Basic DWR Info
- Installed Work Items and Templates

To copy a DWR, the user simply changes the date on any existing DWR.

To copy a DWR, the user simply changes the date on any existing DWR. This prompts the user to confirm the contractor data should be copied to the new DWR date. You may use the calendar to indicate the new DWR date, or you may type the new date over the existing date in the date field.

Tip: The User copying it must have authored the DWR being copied.

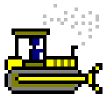


The DWR Info Folder Tab

Figure 5-1

In TDOT, the following must be entered on the DWR Info folder tab on a copied DWR:

- **Date**
- **Temperature**
- **Weather Conditions**
- **Work Performed Remarks, including contractor name**
- **Appropriate Remarks**



Exercise 5-1

In the following exercise, you will copy an existing DWR for April 18, 2005 to create a new DWR for April 20, 2005 on Contract CNB022J.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022J**

First, open the DWR you wish to copy from (4/18/05):

1. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
2. Click the **Open** button. SiteManager displays the Contract ID window.
3. In the **Inspector** list box, scroll to and double-click **jj05751**.
4. In the **Date** list box, scroll to and double-click the DWR Date **04/18/05**. SiteManager displays the Daily Work Reports window.

Now, let's copy the contractor information from the 4/18/05 DWR to a new DWR for 4/20/05.

5. In the **DWR Date** field, type **042005**.

Users may also use the calendar to pick a date.

6. On the keyboard, press the **Tab** key. SiteManager displays a message prompting you to confirm your desire to copy the contractor information.
7. In the message, click the **Yes** button.
8. Click the **Save** button.

Now, let's enter the temperatures and conditions for 4/20/05.

9. In the **High Temperature** field, type **71**.
10. In the **Low Temperature** field, type **52**.
11. In the **A.M.** drop-down list, click the expand arrow to the right of the current selection and click **Sunny**.
12. In the **P.M.** drop-down list, click the expand arrow to the right of the current selection and click **Sunny**.

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.

Now, let's enter a remark for 4/20/05.

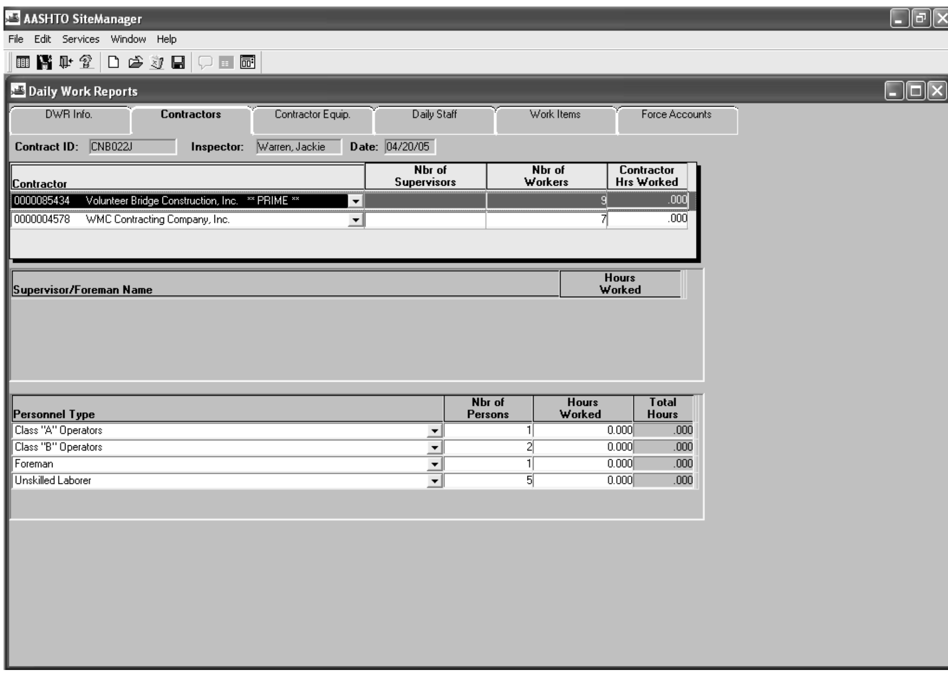
13. In the **Remarks Type** list box, scroll to and click **Work Performed**.
14. In the **Work Performed** text box, type **Volunteer Bridge driving Production Piling.**
15. Click the **Save** button.

Modifying a Copied Daily Work Report

Once a Daily Work Report is copied, the User may modify the Contractors, and Personnel Types, Equipment, and Daily Staff on the new DWR to reflect the activities of the day.

The Contractors Folder Tab

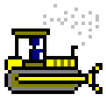
The Contractors (Prime and Sub), and Personnel Types as well as the number of workers may be modified on the Contractors folder tab.



Auto populated – DON'T ENTER.

The Contractors Folder Tab

Figure 5-2



Exercise 5-2

In the following exercise, you will modify the contractors, supervisors, and personnel types for a copied DWR on April 20, 2005 for Contract CNB022J.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022J**

Users are modifying the number of Laborers on the DWR.

1. On the **Daily Work Reports** window, click the **Contractors** folder tab.
2. Click the Contractor **Volunteer Bridge Construction, Inc**.
3. Click the **Personnel Type** area select the **Unskilled Laborer** personnel type.
4. In the **Nbr of Persons** field, type **5** (overwriting the 4).
5. Click the **Save** button.

Now, let's add a subcontractor.

6. Click the **Contractor** area.
7. Click the **New** button. An empty row is added to the list.
8. In the **Contractor** drop-down list, click the expand arrow to the right of the current selection and click **WMC Contracting Company, Inc**.
9. Click the **Save** button.

Now, let's add personnel type for that subcontractor.

10. Click the **Personnel Type** area.
11. Click the **New** button. An empty row is added to the list.
12. In the **Personnel Type** drop-down list, click the expand arrow to the right of the current selection and click **Class "D" Operators**.
13. For the **Class "D" Operators** personnel type, in the **Nbr of Persons** field, type **1**.
14. Click the **Save** button.

Now, let's add another personnel type for that subcontractor.

15. Click the **New** button. An empty row is added to the list.
16. In the **Personnel Type** drop-down list, click the expand arrow to the right of the current selection and click **Foreman**.
17. For the **Foreman** personnel type, in the **Nbr of Persons** field, type **1**.
18. Click the **Save** button.

Now, let's add another personnel type for that subcontractor.

19. Click the **New** button. An empty row is added to the list.

20. In the **Personnel Type** drop-down list, click the expand arrow to the right of the current selection and click **Unskilled Laborer**.

21. For the **Unskilled Laborer** personnel type, in the **Nbr of Persons** field, type **4**.

22. Click the **Save** button.

Now, let's add another personnel type for that subcontractor.

23. Click the **New** button. An empty row is added to the list.

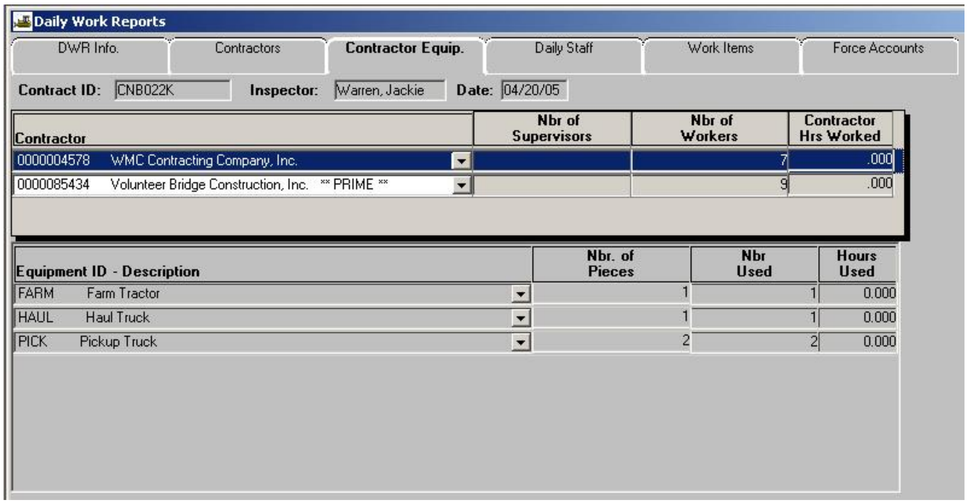
24. In the **Personnel Type** drop-down list, click the expand arrow to the right of the current selection and click **Truck Driver (2 axles)**.

25. For the **Truck Driver (2 axles)** personnel type, in the **Nbr of Persons** field, type **1**.

26. Click the **Save** button.

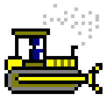
The Contractor Equip. Folder Tab

The contractor's equipment, number of pieces and the number of pieces used may be modified on the Contractor Equipment folder tab.



The Contractor Equip Folder Tab

Figure 5-3



Exercise 5-3

In the following exercise, you will modify a Contractor's equipment list for a copied DWR on April 20, 2005 for Contract CNB022J.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022J**

1. On the **Daily Work Reports** window, click the **Contractor Equip** folder tab.
2. In the **Contractor** area, click **WMC Contracting Company, Inc**.
3. Click the **Equipment ID-Description** area.
4. Click the **Save** button.

Now, let's add an equipment type for that subcontractor.

5. Click the **New** button. An empty row is added to the list.
6. In the **Equipment ID-Description** drop-down list, click the expand arrow to the right of the current selection and click **Farm Tractor**.
7. In the **Nbr of Pieces** field, type **1**.
8. In the **Nbr Used** field, type **1**.
9. Click the **Save** button.

Now, let's add another equipment type for that subcontractor.

10. Click the **New** button. An empty row is added to the list.
11. In the **Equipment ID-Description** drop-down list, click the expand arrow to the right of the current selection and click **Haul Truck**.
12. In the **Nbr of Pieces** field, type **1**.
13. In the **Nbr Used** field, type **1**.
14. Click the **Save** button.

Now, let's add another equipment type for that subcontractor.

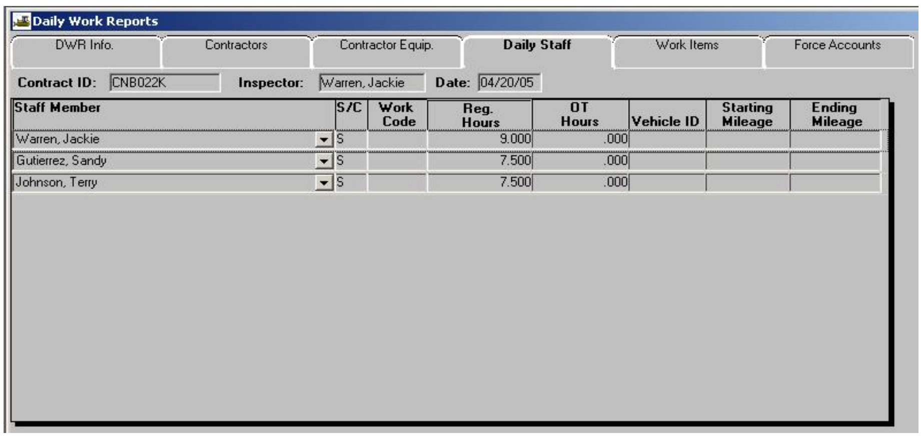
15. Click the **New** button. An empty row is added to the list.
16. In the **Equipment ID-Description** drop-down list, click the expand arrow to the right of the current selection and click **Pickup Truck**.
17. In the **Nbr of Pieces** field, type **2**.
18. In the **Nbr Used** field, type **2**.
19. Click the **Save** button.

Now, let's delete a piece of equipment type for the Prime Contractor.

20. In the **Contractor** area, click **Volunteer Bridge Construction, Inc.**
21. In the **Equipment ID-Description** list, click the **Crane**.
22. Click the **Delete** button.
23. Click **Yes** to the delete message.
24. Click the **Save** button.

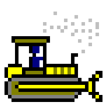
The Daily Staff Folder Tab

The Daily Staff and the hours on site may be modified on the Daily Staff folder tab.



The Daily Staff Folder Tab

Figure 5-4



Exercise 5-4

In the following exercise, you will modify the Daily Staff for a copied DWR on April 20, 2005 for Contract CNB022J.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022J**

1. On the **Daily Work Reports** window, click the **Daily Staff** folder tab.
2. In the **Staff Member** area, click **Miller, Chris**.
3. Click the **Delete** button. SiteManager displays a message to confirm deletion.
4. In the message, click the **Yes** button.
5. In the **Staff Member** area, click **Roberts, Jan**.
6. Click the **Delete** button. SiteManager displays a message to confirm deletion.
7. In the message, click the **Yes** button.

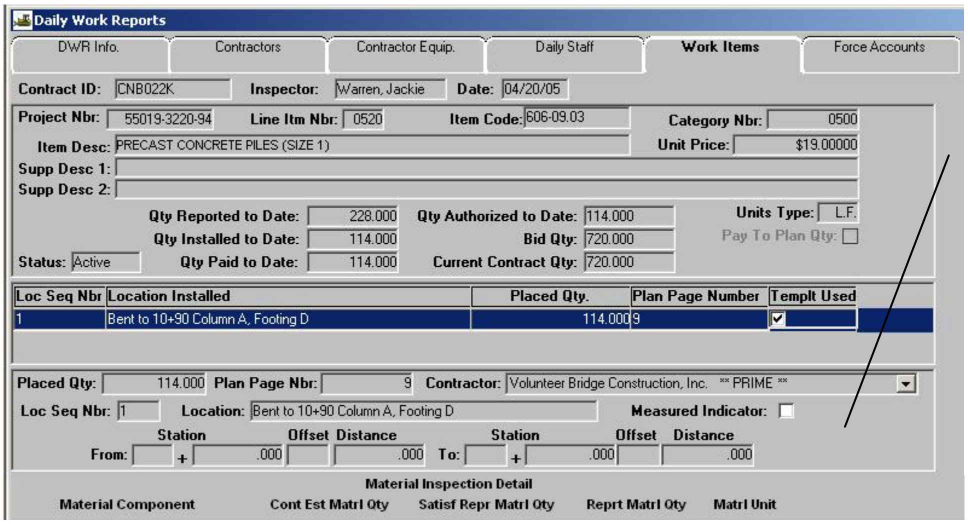
Now, let’s modify the hours for the daily staff.

8. In the **Staff Member** area, click **Johnson, Terry**.
9. In the **Reg Hours** field, type **7.5**.
10. In the **Staff Member** area, click **Warren, Jackie**.
11. In the **Reg Hours** field, type **9**.
12. Click the **Save** button.

The Work Items Folder Tab

Work Item details do not copy from one DWR to another. Work item details for the new Daily Work Report may be recorded on the Work Items folder tab.

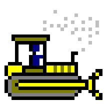
Again, this screen may look slightly different when you get back to your office. An As Built Qty field is now directly below Placed Qty which TDOT does not plan to use. Also the Measured Indicator is displayed different.



The Work Items Folder Tab

Figure 5-5

This exercise will demonstrate the use of a detail multi-line template to record pile driving data and determine the placed quantity of the item.



Exercise 5-5

In the following exercise, you will record work item details for a copied DWR on April 20, 2005 for Contract CNB022J.

User ID: **jj05751**   Group: **INSPST**   Mode: **Standalone**   Contract: **CNB022J**

1. On the **Daily Work Reports** window, click the **Work Items** folder tab.
2. Scroll to and select Project Number **55019-3220-94**, Line Item Number **0520**, Category Number **0500**, Item Code **606-09.03**, Description **PRECAST CONCRETE PILES (SIZE 1)**.
3. On the toolbar, click the **Record Work Item** button.
4. Click the **New** button.

Now, let’s record the details about the work item.

5. In the **Plan Page Nbr** field, type **9**.
6. In the **Contractor** drop-down list, click the expand arrow and click **Volunteer Bridge Construction, Inc**.
7. In the **Location** field, type **Bent to 10+90 Column A, Footing D**.

Now, let’s choose a template.

8. Click the **Save** button. SiteManager displays the DWR Template list box.

9. In the **DWR Template** list box, click **SM07 - 07 CONCRETE/ TIMBER PRODUCTION PILING (ENGLISH)**. SiteManager displays a DWR Template window.
10. Click the **Record Template Data** button.

Now, let's enter the structure data.

11. In the **Structure Type** drop-down list, click the expand arrow and click **Bridge**.
12. In the **Bridge Number** field, type **1**.
13. Click in the **Substructure Type** drop-down list and click **Bent**.
14. In the **Bent Number** field, type **2**.
15. Note that the **Location** field is automatically populated.
16. In the **Station/Position** field, type **10+90 Column A, Footing D**.
17. In the **Length Set** field, type **35.0**.
18. In the **Required Bearing** field, type **90.0**.
19. Click the **Save** button.

Remaining portion of template exercise is in detail section of the template. Remind students to be careful of place holder zeros.

Now let's enter the pile information.

20. In the **Pile Number** field, type **1**.
21. In the **Initial Length (ft)** field, type **35.0**.
22. In the **Pile Stripped for Seismic? (-2')** field, click the **Yes** radio button (ON).
23. In the **Cut-Off (ft)** field, type **4.0**.
24. In the **Refusal?** field, select the **Yes** option.
25. Click the **Save** button.
26. What is the Total Pay Quantity? **29.0**

Now, let's review the results.

27. Click the **Close** button.
28. Note the **Placed Qty** field has been populated.
29. What was the total placed quantity? **29.0**

Creating and Using Attachments

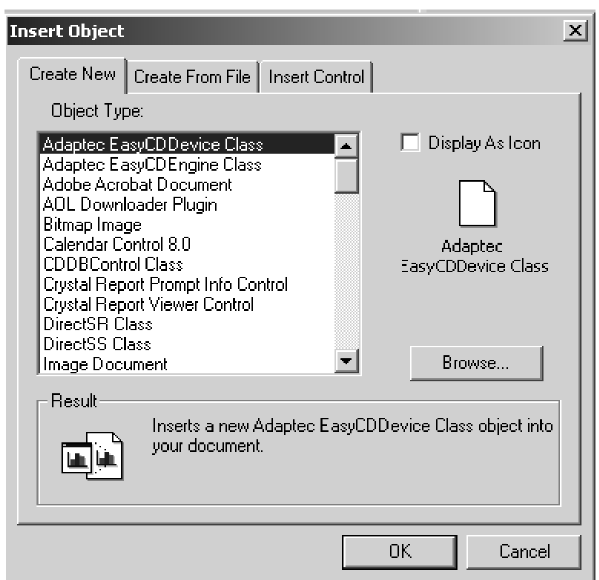
The Attachment functionality of SiteManager allows URL links, Plug-In applications, and OLE attachments to be attached to certain SiteManager records.

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 access the functionality of other OLE-compliant Windows applications. The Attachments feature choice will work with any properly-installed, OLE-compliant Windows application.

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 assess the embedded data *if the application that created the data is installed on their workstation*.



Insert Object Dialog Invoked by the New OLE button

Figure 5-6

TDOT field Office Staff will use the Plug-In Attachment function in the Contracts window to run the plug-ins that adjust the estimate.

TDOT will use the URL Attachment function in the System Attachment window to access additional resources such as the TDOT File Management system.

TDOT field Office Staff and Inspectors will use the OLE Attachment function in the DWR window to attach an Excel or Word 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 5-6

In the following exercise, you will create an attachment on a DWR Work Item on DWR date 4/20/05 on Contract CNB002J.

User ID: **jj05751** Group: **INSP** Mode: **Standalone** Contract: **CNB022J**

1. Click the **Attachments** button on the toolbar.
2. Click the **New OLE** button on the toolbar.
3. Click the **Create From File** folder tab.
4. Click the **Browse** button.
5. Select the file to be attached:
   C:\SMTRAINS\SMFILES**Attachment**.xls
6. Click the **Open** button.
7. Click the **OK** button.
8. In the **Name** field, type **Example**.
9. In the **Description** field, type **Calculations**.

The Description field is important for identifying the contents of the attachments.

10. In the **Attachment Security** box, click the **Add All** button.
11. Click the **Add** button.
12. Click the **Attachments** button.
13. Click the **Save** button.
14. Click the **Remarks** button.
15. In the **Remarks** field, type **View Attachment**.
16. Click the **Remarks** button to close the Remarks window.
17. Click the **Save** button.
18. Click the **Attachments** button.
19. Click the **Run Attachment** button.

The Excel file may be minimized at the bottom of your computer, on the task bar.

20. In the **Excel** worksheet, click the **Exit** button to close the attached document and program.
21. Click the **Save** button.

Now, let’s prepare for the Summary Exercise.

22. Click the **DWR Info** folder tab.

Review for Section 5

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

1. On the **SiteManager** main panel, double-click the **Daily Work Reports** icon.
2. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
3. Click the **Open** button.
4. In the **Contract ID** list box, scroll to and double-click desired Contract.
5. On the **Inspector** list box, scroll to and double-click 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. Click the **Save** button.
12. Click the desired folder tab.
13. Modify the data appropriately.
14. Click the **Save** button.

To attach a file to a record:

1. Click the **Attachment** button.
2. Click the **New OLE** button.
3. Click the **Create from File** folder tab.
4. Click the **Browse** button.
5. Select the drive and file name for the file to be attached.
6. Click the **Open** button.
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. Click the **Save** button.

Summary Exercise for Section 5

In the following exercise, you will modify a copied DWR for Contract CNB022L.

User ID: **jj05751** Group: **INSPST** Mode: **Standalone** Contract: **CNB022L**

Use the Daily Work Report from **Jackie Warren (jj05751)** for Contract **CNB022L** on **11/21/05** to copy and create a new DWR for **11/22/05**. Be sure to copy the Contractor information for use in the following steps.

Temperature and Weather conditions:

- **High - 59 degrees**
- **Low - 36 degrees**
- **AM -Partially Cloudy**
- **PM - Clear**

Remarks:

- Work Performed: **International Traffic Systems, Inc Installed permanent signs.**

Personnel for Prime Contractor, **Volunteer Bridge Construction, Inc**. (update the record as necessary):

- **Class "A" Operators – 1**
- **Unskilled Laborer – 4**
- **Sweeping Machine (Vacuum) – 1**
- **Truck Driver (3/4 axles) – 1**

Personnel for Subcontractor, **International Traffic Systems, Inc.** (update the record as necessary):

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

Equipment for **Volunteer Bridge Construction, Inc.** (update the record as necessary):

- **Pickup Truck – 2**
- **Backhoe – 1**
- **Haul Truck – 1**
- **Sweeping Machine – 1**

Equipment for **International Traffic Systems, Inc**. (update the record as necessary):

- **Pickup Truck – 2**
- **Haul Truck – 1**

Exercise continues on the next page.

Daily Staff

- **Warren, Jackie – 9 hours**
- **Johnson, Terry – 9 hours**

Items: Record the following information for Line Item Nbr 0310 Project 55019-3220-94, Item Code 712-06:

- Plan Page Number: **16**
- Contractor: **International Traffic Systems, Inc.**
- Location: **BOP to EOP**
- Template: **SM22A**

Record the following information for template SM22A:

- Sign Schedule #: **12B**
- Legend: **General Robert R. Neyland Bridge**
- Size: **24” x 60”**
- Area of Each Sign: **10.0**
- # of Signs: **4**

What is the placed qty for this item at this location? **40.0**

Exit SiteManager.

Section 6 From PM to Server
for Field and Office Documentation

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

- Upload Data to the Server
- View Pipeline Information

Overview

Pipeline is the process that automates the transfer of data. SiteManager provides the Pipeline processes because Contract data must be downloaded and uploaded often during the life of a Contract. In general, the data downloaded from the Server is the Basic Contract Data, which is primarily the Contract specifications. The data uploaded to the Server is the Contract activity data, which is the work done on the Contract. Pipeline automates the data flow from the:

PM = Standalone

Think of PM as Personal Machine

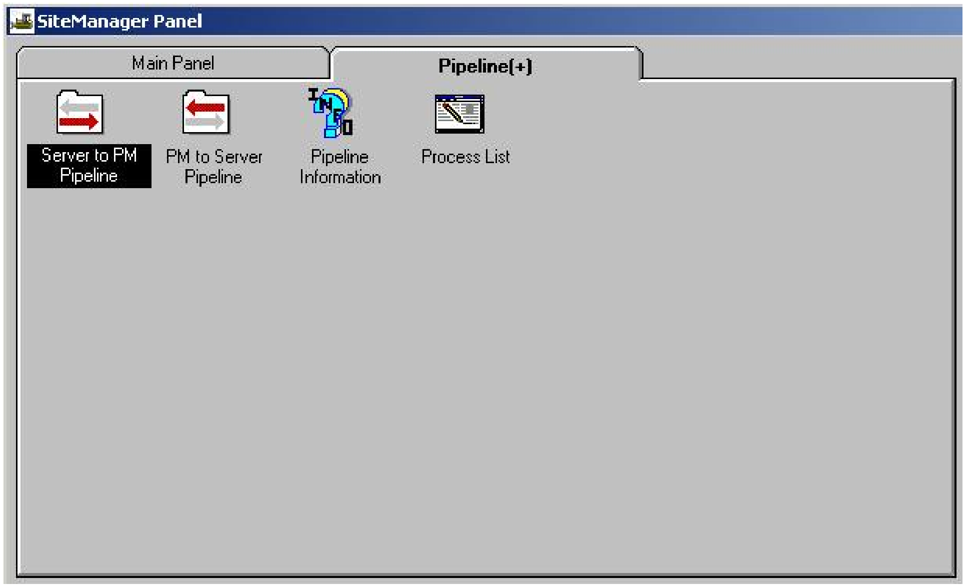
- Server to Standalone Mode (PM)
- Standalone Mode (PM) to Server

Pipeline The pipeline process transfers data files from one database to another. In SiteManager, the User uses the pipeline process to download data directly from the server's database to the standalone workstation's database, and to upload data directly from the standalone workstation's database to the server's database.

The Pipeline Panel

When logging on to SiteManager to Pipeline data, the User connects to the server database.

Upload contract data on a regular basis to avoid problems if somebody leaves near the end of a contract.



The Pipeline Panel

Figure 6-1

The following table shows how the Pipeline panels are used to transfer data.

Step	Activity	Process	Pipeline Panel
1	Download Basic Contract Data from the Server	The User selects and downloads basic contract data from the server's database to the standalone workstation's database using the Server to PM Pipeline panel. The Pipeline process loads the data directly into the User's standalone database. Before DWRs can be generated in Standalone mode, the User must download Basic Contract Data from the Server.	Server to PM Pipeline panel
2	Create Daily Work Reports	The User creates and modifies DWRs on the contract to report the usage of Labor, Equipment, and Items on the Contract.	As DWRs are created, they are listed on the DWR Select folder tab in the PM to Server window.
3	Upload Daily Work Reports to the Server	The User selects and uploads DWRs from the standalone workstation to the Server.	PM to Server Pipeline panel
4	View Pipeline History	The User can view a history of Pipeline activity.	Pipeline Information panel
5	Download Basic Contract Data and Daily Work Reports, as needed.	New data is added to the Contract on the Server only. The User downloads new Contract data as it becomes available. The new data updates the standalone database. The User can also download Daily Work Reports.	Download Basic Contract Data and Daily Work Reports as needed. NOTE: Basic Contract Data includes all Change Order information.
6	Release the Contract	When the Contract work is done, the User uses Pipeline to release the Contract back to the Server.	PM to Server Pipeline panel

The Pipeline Process Table

Table 6-1

In TDOT, the Inspector must always check out Basic Contract Data when pipelining a contract to Standalone mode on his/her computer for the first time. It is required that the Basic Contract Data be pipelined to Standalone mode a minimum of twice a week to ensure that the Standalone database has the most current contract information.

Check In — Uploading Data from PM to the Server

The PM to Server Pipeline panel lets the User upload (check in) data from the standalone database to the server. When logging on to SiteManager, the User must connect to the server database. The pipeline process transfers the selected data directly from the User's standalone database to the server database.

The pipeline process loads the data directly from the User's standalone database to the server database.

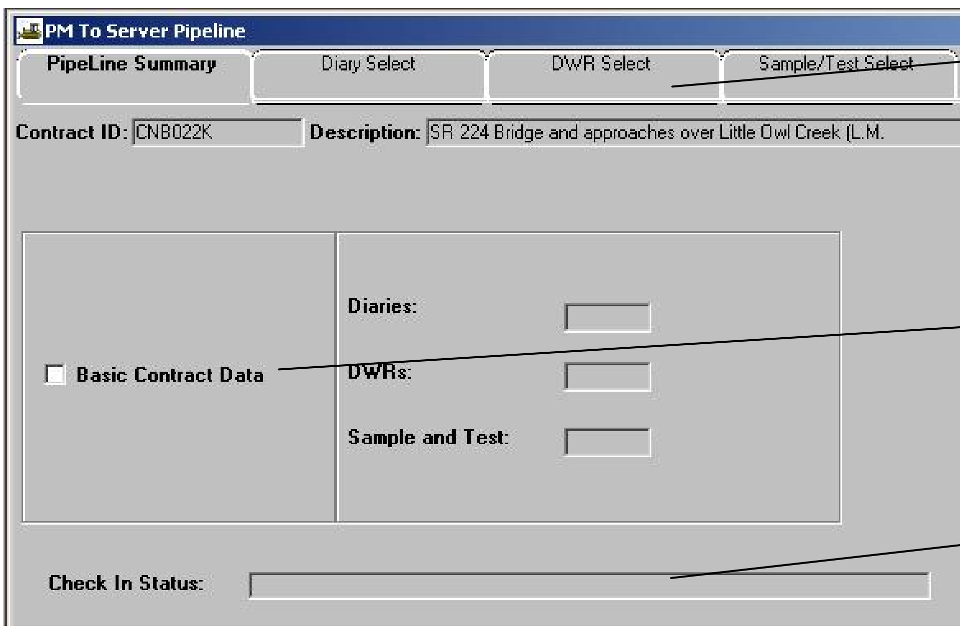
To upload Contract data to the server, the User must first select a Contract and then select the Daily Work Reports to upload.

To release the Contract when the Contract work is completed, and all DWRs have been pipelined to the server, the User checks the Basic Contract Data box. After the User selects the data to upload, the pipeline process is triggered by selecting the Services menu Pipeline Data option.

To include current data in an estimate, make sure all DWRs have been uploaded before generating the estimate.

PM to Server Pipeline Summary

The PM to Server Pipeline Summary folder tab shows the number of Daily Work Reports selected. When the User selects the Services menu Pipeline Data option, the selected data is extracted from the standalone workstation.



The DWR folder tab is identical to the one in the Server to PM Pipeline window.

The Basic Contract Data check box releases the contract when all work is done.

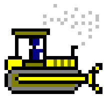
The Check In Status field displays the activity and complete status of the pipeline process.

The Pipeline Summary Folder Tab

Figure 6-2

In TDOT, the User should pipeline DWRs to the server as soon as possible or as needed for an estimate. It is required that the Daily Work Report Data be pipelined to Server mode a minimum of twice a week to ensure that the Server database has the most current contract information.
In TDOT, at the end of the contract, the User should pipeline the Basic Contract Data from the standalone database back to the Server.

Why do you Pipeline Basic Contract Data? To keep the Contract Select list small.



Exercise 6-1

In the following exercise, you will navigate to Server Pipeline panel and select Contract CNB022N.

User ID: **jj05751** Group: **INSP** Mode: **Server** Contract: **CNB022N**

1. Double-click the **SiteManager Training** program icon on the desktop.

   Shift-tab if user ID not highlighted.

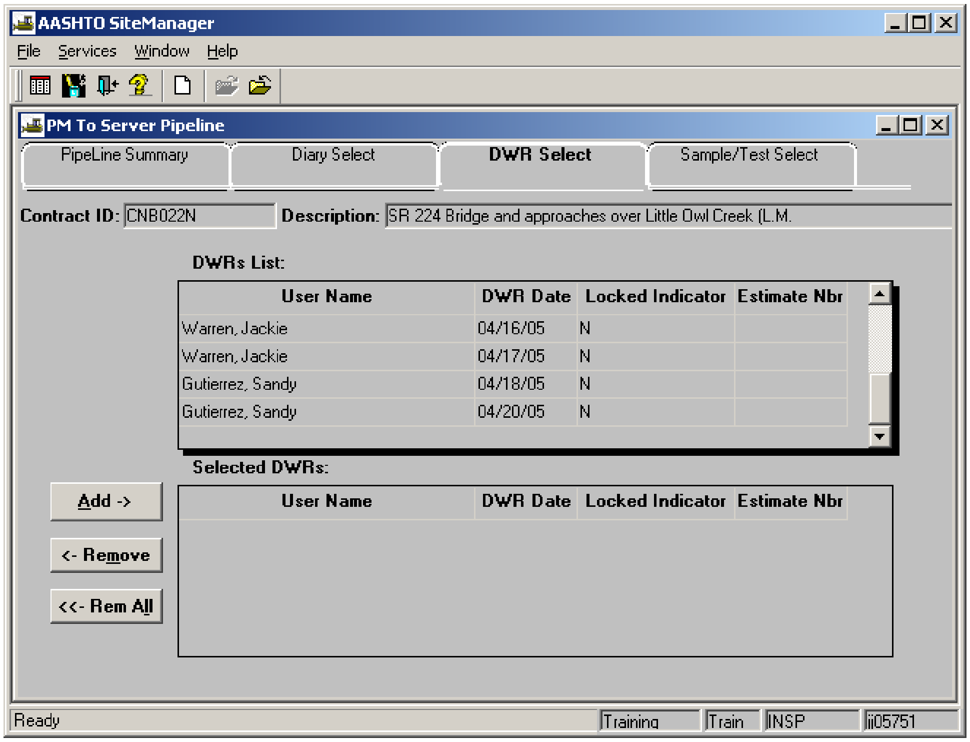
2. In the **User ID** field, type **jj05751**.
3. In the **Password** field, type **pass**.
4. Click the **Logon** button.

Now, let's open the Pipeline panel and select a contract.

5. On the **Main Panel**, double-click the **Pipeline** icon.
6. On the **Pipeline** panel, double-click the **PM to Server Pipeline** icon.
   SiteManager displays the PM to Server Pipeline window.
7. On the toolbar, click the **Open** button.
8. In the **Contract ID** list box, scroll to and double-click Contract **CNB022N**.
9. Click the **DWR Select** folder tab.

Selecting Daily Work Reports

When the User clicks the DWR Select folder tab on the PM to Server Pipeline panel, the panel displays a list of Daily Work Reports that have not been uploaded to the server. The User selects the Daily Work Reports to upload.

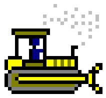


The DWR Select Folder Tab

Figure 6-3

In TDOT, completed Daily Work Reports should be pipelined from Standalone mode to Server mode as soon as possible or as needed for an Estimate. It is required that the Daily Work Report Data be pipelined to Server mode a minimum of twice a week to ensure that the Server database has the most current contract information.

Diaries will always be created in Server mode and do not need to be pipelined.



Exercise 6-2

In the following exercise, you will upload data from Contract CNB022N to the server.

User ID: **jj05751** Group: **INSP** Mode: **Server** Contract: **CNB022N**

1. In the **DWRs** list box, click the DWR created by **Warren, Jackie** on **04/18/05**.
2. Click the **Add** button.
3. In the **DWRs** list box, click the DWR created by **Warren, Jackie** on **04/19/05**.
4. Click the **Add** button.
5. In the **DWRs** list box, click the DWR created by **Warren, Jackie** on **04/20/05**.
6. Click the **Add** button.
7. Click the **Pipeline Summary** folder tab. Note that you have selected 3 DWRs.
8. Click the **Services** menu.
9. Click the **Pipeline Data** choice. *The SiteManager training application displays an SQL error. In the error message, click the **Continue** button.*

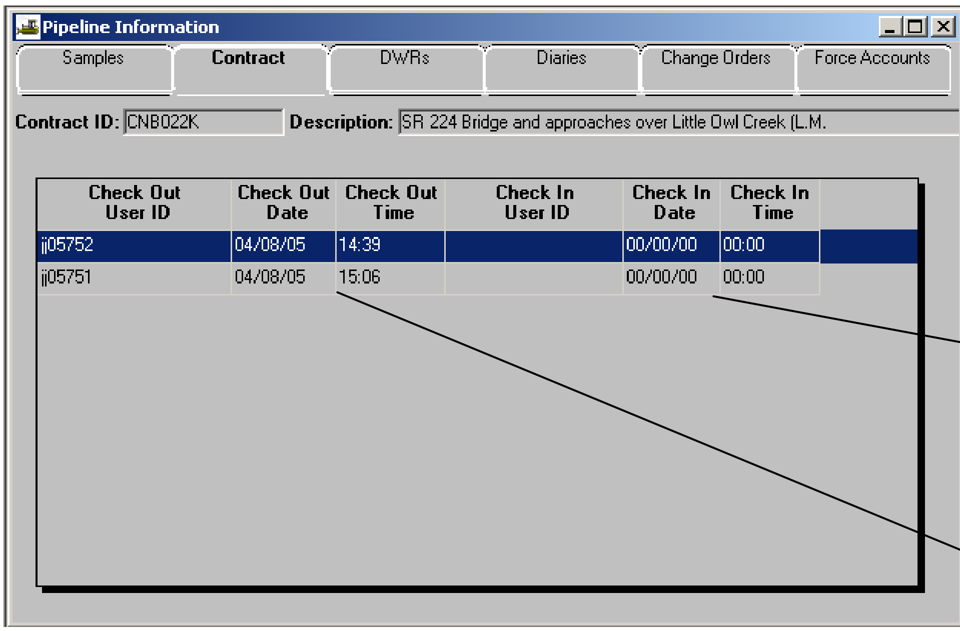
This is due to the training database. This does not occur in production.

10. The **Check In Status** field message confirms that check-in is complete. Note that the DWRs field now shows 0. This confirms that the DWRs have been pipelined.
11. Click the **Close** button.

Viewing Pipeline Information

The Pipeline Information panel lets the User view Pipeline information about Daily Work Reports (DWRs). The Pipeline Information panel shows a history of Pipeline activity, such as when the data was downloaded and uploaded, and who downloaded or uploaded the data.

The Pipeline Information panel displays information that applies to the selected Contract. When the User is connected to the server, the panel shows information on data uploaded and downloaded to and from the server. When the User is connected to the standalone database, the panel shows information on data uploaded and downloaded to and from the workstation.



Check In Date/Check In Time refers to transferring data from PM to Server.

Check Out Date/Check Out Time refers to transferring data from the Server to PM.

The Contract Folder Tab

Figure 6-4

In TDOT, the Pipeline Information panel can be used by the Project Supervisor to check the frequency of pipelining activities to ensure standalone contract data is pipelined up regularly. It may also be used to verify that checked out DWRs have been pipelined to the server prior to generating an estimate.

Exercise 6-3

In the following exercise, you will view a history of Pipeline activity on Contract CNB022N.

User ID: **jj05751** Group: **INSP** Mode: **Server** Contract: **CNB022N**

1. On the **Pipeline** panel, double-click the **Pipeline Information** icon.
2. Click the **Contract** folder tab.
3. When was Contract **CNB022N** checked out by User jj05751?
   04/08/05
4. Click the **DWRs** folder tab.
5. How many DWRs has **jj05751 (Jackie Warren**) checked in?
   3
6. Click the **Close** button.

Project Supervisors will use this to see how often Inspectors are uploading.

Daily Work Report Applicability

Daily Work Report data is transferred using the Pipeline function. To begin working on a Contract, the User must first download Basic Contract Data from the Server. ‘Basic Contract Data’ includes all of the Contract data required to process the Daily Work Reports, including Change Orders, Subcontracts, and Master Lists. Daily Work Reports can be downloaded from the Server and edited only if they are unauthorized and not included on a paid Estimate.

Pipeline is used to:

- Download Basic Contract Data, which includes Change Orders and Subcontracts, from the Server at least twice a week
- Upload Daily Work Reports to the Server at least twice a week
- Upload the Contract when work is done

Review for Section 6

To upload data to the server:

1. When logging on to SiteManager, connect to the server database.
2. On the **SiteManager** main panel, double-click the **Pipeline** icon.
3. On the **Pipeline** panel, double-click the **PM to Server Pipeline** icon. The Pipeline Summary folder tab is displayed.
4. To select a Contract, click the **Open** button.
5. In the **Contract ID** list box, scroll to and double-click the Contract.
6. To release the Contract, click the Basic Contract Data check box (ON).
7. To select Daily Work Reports, click the **DWR Select** folder tab.
8. In the **DWR** list box, shift-click each Daily Work Report to be uploaded.
9. Click the **Add** button. The selected Daily Work Reports are added to the **Selected DWRs** list.
10. Click the **Pipeline Summary** folder tab. The panel displays the total number of Diaries, Daily Work Reports, and Samples selected.
11. To upload the selected data to the Server, click the **Services** menu and click the **Pipeline Data** choice.

To view a history of Pipeline activity:

1. When logging on to SiteManager, to view information on data transferred to and from the server, connect to the server database. To view information on data transferred to and from the workstation, connect to the standalone database.
2. On the **SiteManager** main panel, double-click the **Pipeline** icon.
3. On the **Pipeline** panel, double-click the **Pipeline Information** icon. The Samples folder tab is displayed.
4. To select a Contract, click the **Open** button.
5. In the **Contract ID** list box, scroll to and double-click the Contract.
6. To view Pipeline information for the selected Contract, click the **Contract** folder tab.
7. To view Pipeline information on Daily Work Reports for the selected Contract, click the **DWRs** folder tab.
8. To view Pipeline information on Change Orders for the selected Contract, click the **Change Orders** folder tab.

Summary Exercise for Section 6

In the following exercise, you will pipeline data to the Server on Contract CNB022N.

User ID: **jj05751** Group: **INSP** Mode: **Server** Contract: **CNB022N**

1. For Contract ID **CNB022N**, upload the following DWRs for **Warren, Jackie** to the Server: DWR Dates:
    - **04/12/05**
    - **04/13/05**
    - **04/14/05**
    - **04/15/05**
    - **04/16/05**
    - **04/17/05**.
2. Navigate to the **Pipeline Information window.**
3. What date/time/user is shown as checking out the DWR created by jj05751 on 4/12/05 on Contract CNB022N?
   NONE
4. What date/time/user is shown as checking in the DWR created by jj05751 on 4/12/05 on Contract CNB022N?
   jj05751 - just now
5. Exit SiteManager.

Section 7 Diary
for Field and Office Documentation

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

- Create a new Diary
- Preview a Daily Work Report
- Authorize a Daily Work Report
- Create a Charge Day
- View the Unauthorized DWR Report
- View the Installed Work Report
- Unauthorize and Correct a DWR Work Item Entry
- View the History of Daily Work Reports
- View the Installed Work Items Report
- View the Item Quantity Report

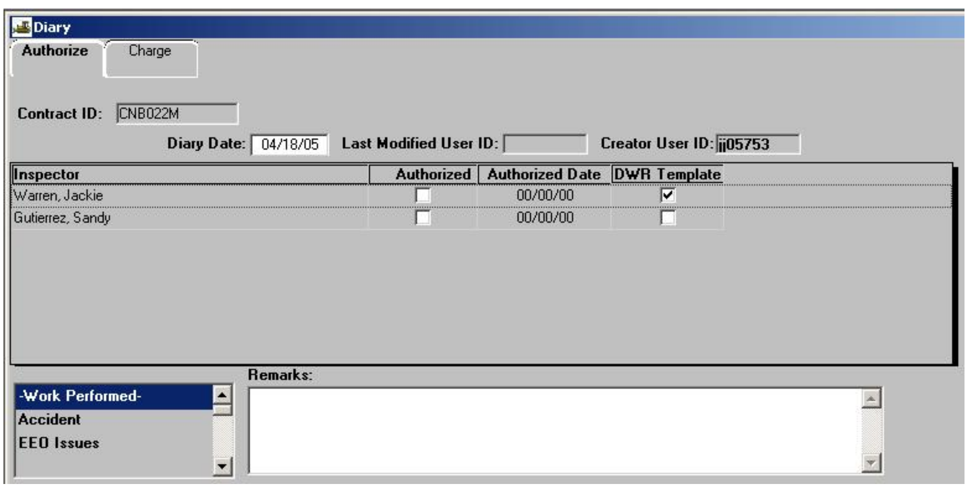
Diary Overview

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

- Authorize (approving for payment)
- Charge

The User uses the Diary window to perform five functions:

- Create a new or open an existing Diary for a specific contract and day
- Preview Daily Work Reports for a specific contract and day
- Authorize Daily Work Reports (or not)
- Apply Time Charges for a specific contract and day (as well as milestones, if applicable)
- Make Remarks



The Authorize Folder Tab of the Diary Window

Figure 7-1

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

Diaries will only be created in Server Mode.

Exercise 7-1

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

User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022M**

1. Double-click the **SiteManager Training** program icon on the desktop.
2. In the **User ID** field, type **jj05753**.
3. In the **Password** field, type **pass**.
4. Click the **Logon** button.
5. On the **Main Panel**, double-click the **Daily Work Reports** icon.
6. On the **Daily Work Reports** panel, double-click the **Diary** icon.

Shift-tab if user ID not highlighted.

Creating a New Diary

If Diary already exists for entered date, it will automatically open.

The Diary Authorize folder tab lets the User create a Diary. The User can create a Diary with or without Daily Work Reports. Typically, the User creates a Diary from the Daily Work Reports that have been submitted by the Inspectors. To create a Diary, the User selects a Contract first, and then enters the Diary's date on the Diary Authorize panel. By entering the date, the User is also selecting the Daily Work Reports 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, a calendar is displayed on which the User can select the date.

The Calendar

Figure 7-2

Tip: The User cannot enter a date that is after the current system data.

After the User selects a date, the Diary Authorize folder tab lists the Daily Work Reports submitted for the selected date. The reports are listed alphabetically by the name of the Inspector who submitted the report.

Exercise 7-2

In the following exercise, you will create a new Diary on April 18, 2005 for Contract CNB022M.

User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022M**

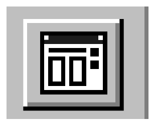
1. On the **Diary** window, click the **Services** menu and click **Choose Keys**.
2. In the **Contract ID** list box, scroll to and double-click Contract **CNB022M**.
3. In the **Diary Date** field, type **041805**.
4. Press the **Enter** key. The **Diary** window displays the list of DWRs submitted for the current date.
5. Click the **Save** button.

Have students type the date.

Previewing Daily Work Reports

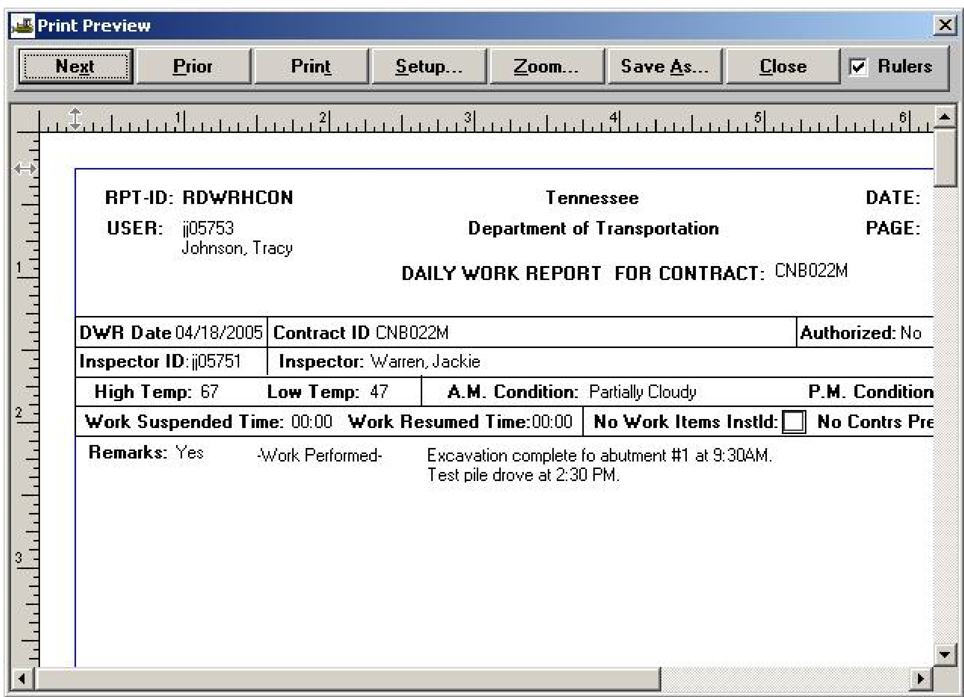
The Preview option on the Diary panel lets the User view and print a summary of a Daily Work Report without leaving the Diary panel.

The Preview button option may be accessed by either the Preview DWR button on the toolbar or through the Services menu.



The Preview DWR Button

Figure 7-3

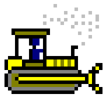


The Daily Work Report Preview

Figure 7-4

In TDOT, before authorizing a DWR, the Lead Inspector or Project Supervisor should review the DWR for any errors or omissions. Additionally, the Lead Inspector or Project Supervisor should document remarks as necessary within the appropriate Remark Type field.

It is important for the Project Supervisor to look at the DWRs since the Inspectors can approve their own DWRs. Project Supervisors are still accountable for DWRs in their office.



Exercise 7-3

In the following exercise, you will preview a DWR on April 18, 2005 for contract CNB022M from the Diary window.

User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022M**

1. In the **Inspector** list box, click the DWR for **Warren, Jackie**.
2. Click the **Preview DWR** button. Review the DWR.
3. Did the contractor drive test piles that day? **YES**
4. What was the location of the line item placement? **Abutment #1, Column B, Footing A**
5. Click the **Close** button.

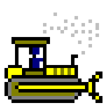
Authorizing Daily Work Reports

The Diary Authorize folder tab lets the User 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. The User can remove authorization (and the authorized date) by removing 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 an authorized Daily Work Report has been uploaded to the server 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.

In TDOT, DWRS should be authorized if all of the Placed Quantities reported in the DWR are accurate. If payment for the items installed needs to be adjusted due to test reports, this will be done by the Office Staff during estimate preparation using plug-in programs designed for this purpose.



Exercise 7-4

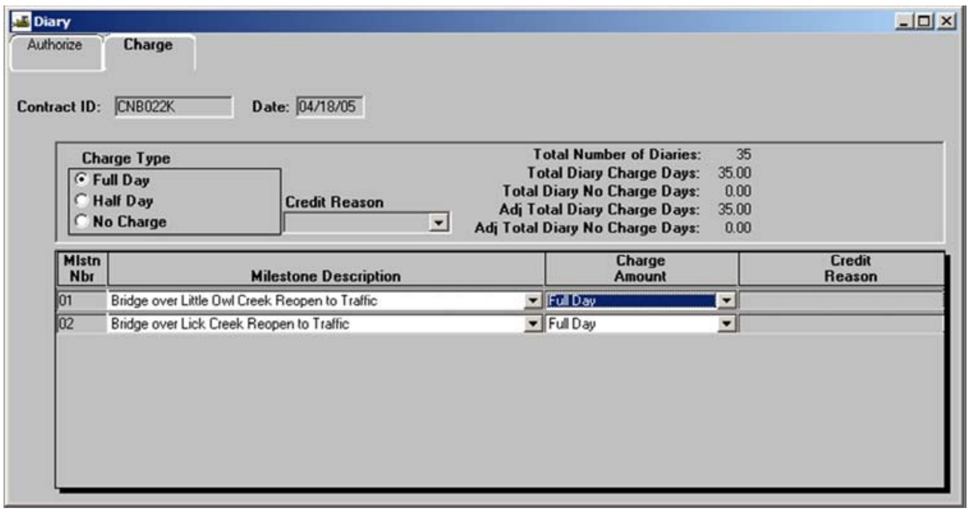
In the following exercise, you will authorize the DWR for April 18, 2005 on Contract CNB022M.

User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022M**

1. In the **Inspector** list box, click the DWR for **Warren, Jackie**.
2. Click the **Authorized** check box (ON).
3. Click the **Save** button.

Creating Charge Days and No Charge Days

The Diary Charge folder tab lets the User record charge or credit information for the day and enter remarks. The User reviews 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 to the Contract end date. A No Charge (credit) day is a day on which no work was performed on the Contract. For No Charge days, no time is applied towards the Contract end date. 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.



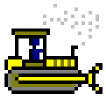
The Charge Folder Tab

Figure 7-5

In TDOT, 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 folder tab. Consequently, the Charge Day folder tab has no impact on Fixed Completion Date contracts.

Charging of days will only be done for working day milestones for phased construction and mowing contracts. Charge days for milestones must be entered for each charge day for each milestone.

TDOT will not use half-day charges.



Exercise 7-5

The Charge Days folder tab has no impact on Fixed Completion Date contracts.

In the following exercise, you will review the Diary Charge Days folder tab for Contract CNB022M on April 18, 2005.

User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022M**

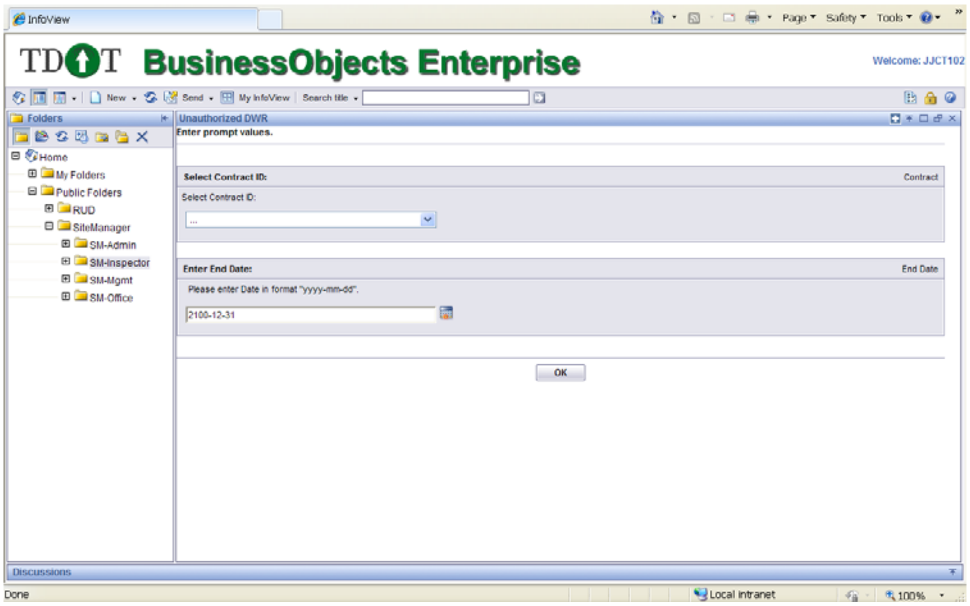
1. On the **Diary** window, click the **Charge** folder tab.
2. To apply the charge to a milestone, click the **Milestone** field and click the **New** button. An empty row is inserted.
3. In the **Milestone** drop-down list, select **Milestone 01, Bridge over Little Owl Creek Reopen for Traffic**.
4. In the **Charge Amount** drop-down list, click the expand arrow and click **Full Day.**
5. Click the **Save** button.
6. Click the **Close** button.

Select Milestones when the Milestones are not set up with Completion Date type time charges.

Viewing the Unauthorized DWR Report

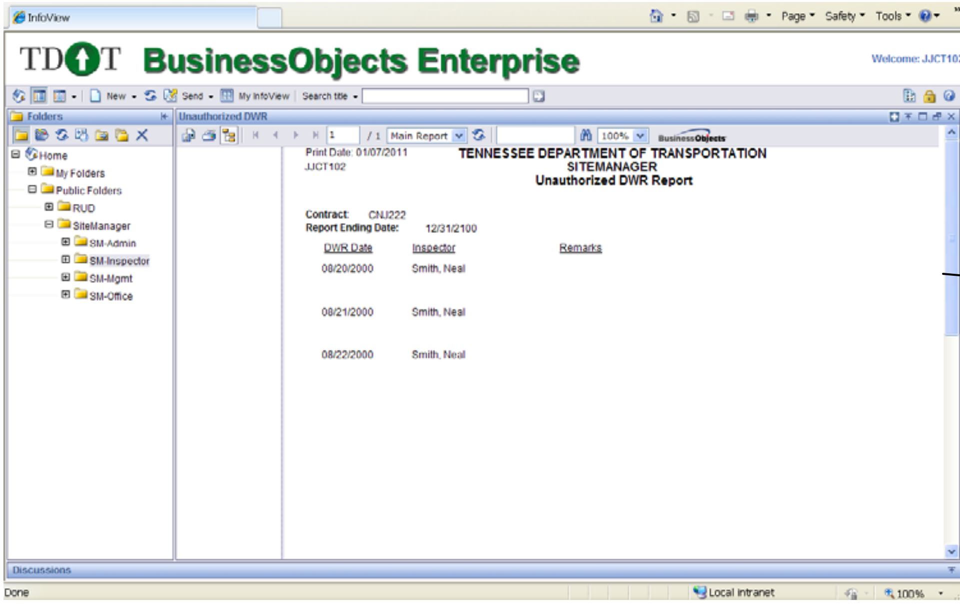
We cannot view TDOT custom reports in the training environment.

The unauthorized DWR report is a TDOT custom report that shows all the DWRs for a project that remain Unauthorized.



Unauthorized DWR Report - Parameters window

Figure 7-6



Installed Work Report (next topic) is also a tool for Identifying Unauthorized DWRs.

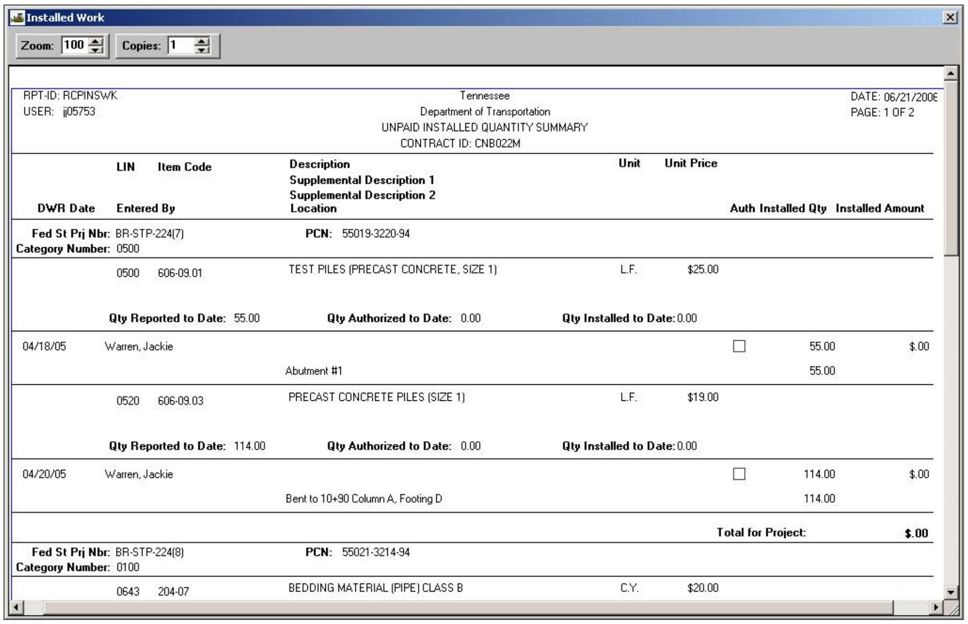
Unauthorized DWR Report

Figure 7-7

In TDOT, the Unauthorized DWR Report is used to print a list of all DWR reports on the server that are unauthorized for the time period. This will allow staff to ensure unauthorized DWRs can be included in the estimate, as appropriate.

Viewing the Installed Work Report

The Installed Work Report displays all the items of work recorded on Daily Work Reports that have not been included on an estimate. There is an indicator for each item entry to indicate whether the displayed Installed Quantity has been authorized for payment on a Diary.



The Installed Work Report

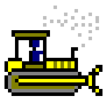
Report may be sorted using the Item Code, Description, and Installed Quantity column headings.

Once the estimate is generated, authorized DWRs will not be included in the report.

Figure 7-8

In TDOT, the Installed Work Report may be used to review quantities recorded in DWRs that have not yet been included in an estimate. Discrepancies in placed quantity totals may be apparent and therefore addressed prior to estimate generation.

Any "Auth" box that shows an "X" is authorized for payment and will be included in the next estimate.



Exercise 7-6

In the following exercise, you will view the Installed Work Report for Contract CNB022M.

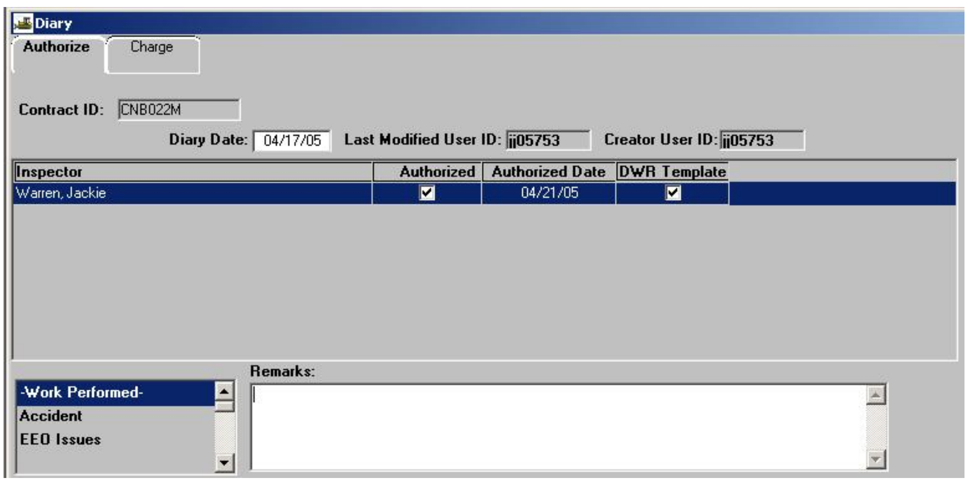
User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022M**

1. Click the **Main Panel** folder tab.
2. On the **Main Panel**, double-click the **Contractor Payments** icon.
3. On the **Contractor Payments** panel, double-click the **Reports** icon.
4. On the **Reports** panel, double-click the **Installed Work** icon.
5. On the **Report Criteria** selection panel, double-click Contract **CNB022M**.
6. What is the Quantity Reported to Date for Category Nbr **0500**, LIN **0500,** Item Code **606-09.01**? ____**55.00**____
7. Is that quantity authorized for payment on the next estimate?____**Yes**____
8. Click the **Close** button.

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.



The Diary window with the DWR Authorized

Figure 7-9

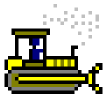
In TDOT, if an inaccuracy is discovered for a DWR that has been authorized on a Diary but not included on an estimate, the DWR should be unauthorized and the creator of the DWR notified of the necessary changes. If the DWR author is an Inspector, the DWR should be pipelined to standalone mode, modified 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 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.

TDOT policy is to correct Inspector DWRs in standalone to keep standalone and server in sync.



Exercise 7-7

In the following exercise, you will unauthorize a DWR on the Diary for 4/17/2005; adjust the placed quantity on the DWR and then re-authorize the DWR for payment for Contract CNB022M.

User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract**: CNB022M**

1. Click the **Main Panel** folder tab.
2. On the **Main** panel, double-click the **Daily Work Reports** icon.
3. On the **Daily Work Reports** panel, double-click the **Diary** icon.
4. Click the **Open** button. SiteManager displays the Contract ID window.

Now, let's choose a contract and Diary.

5. From the **Date** selection list, double-click **04/17/2005**.
6. In the **Inspector** list box, click to select the DWR for **Warren, Jackie**.

Now, let's unauthorize a DWR.

7. Click the **Authorized** check box (OFF).
8. Click the **Save** button.
9. Click the **Close** button.
10. Exit SiteManager.

Now, let's log on as an Inspector to pipeline the DWR to standalone mode

11. On the desktop, double-click the **SiteManager Training** program icon.
12. In the **User ID** field, type **jj05751**.
13. In the **Password** field, type **pass**.
14. Click the **Logon** button.

In server mode to pipeline the DWR to standalone so that you may correct it.

15. On the **Main Panel**, double-click the **Pipeline** icon.
16. On the **Pipeline** panel, double-click the **Server to PM Pipeline** icon. SiteManager displays the Server to PM Pipeline window.
17. Click the **Open** button.
18. In the **Contract** list box, scroll to and double-click Contract **CNB022M**.
19. Click the **DWR Select** tab.
20. In the **DWRs** list box, click the DWR created by **Warren, Jackie** on **04/17/05**.
21. Click the **Add** button.
22. Click the **Pipeline Summary** tab.

23. On the **Pipeline Summary** tab, click the **Basic Contract Data** check box (ON).
24. Click the **Services** menu and click **Pipeline Data**. The progress of the download is shown in the **Pipeline Status** field. A message confirms that the data is downloaded.
25. Click the **Exit** button.

Now, let's log on as an Inspector to correct the DWR in standalone mode.

26. On the desktop, double-click the **SiteManager Training** program icon.
27. In the **User ID** field, type **jj05751**.
28. In the **Password** field, type **pass**.
29. In the **Connect To** drop-down list, click the expand arrow to the right of the current selection and click **Training Standalone**.
30. Click the **Logon** button.

Now, let's open the DWR that we are correcting.

31. On the **Main Panel**, double-click the **Daily Work Reports** icon.
32. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon.
33. Click the **Open** button. SiteManager displays the Contract ID window.
34. From the **Contract ID** selection list, double-click Contract **CNB022M**.
35. In the **Inspector** list box, double-click User ID for **Warren, Jackie**
36. From the **Date** list box, double-click **04/17/05**. SiteManager displays the info for that DWR in Daily Work Reports window.

Now, let's select the work item to correct.

37. Click the **Work Items** folder tab.
38. Scroll to and select Project **55021-3214-94**, Line Item Number **0643**, Category Number **0100,** Item Code **204-07,** Description **BEDDING MATERIAL (PIPE) CLASS B**.
39. On the toolbar, click the **Record Work Item** button.

Now, let's choose a template to use for the correction.

40. On the toolbar, click the **DWR Template** button. SiteManager displays the DWR Template window.
41. From the **Template ID** column, double-click Template ID **SM10E**.
42. In the **Length (ft)** field, type **50.00**. Press **Tab** to calculate.
43. On the template, click the **Save** button.
44. On the Item Recording window, click the **Close** button.
45. On the toolbar, click the **Save** button.

46. Click the **Close** button.
47. Exit SiteManager.

Now, let's log on as an Inspector to pipeline the DWR to server mode.

48. On the desktop, double-click the **SiteManager Training** program icon.
49. In the **User ID** field, type **jj05751**.
50. In the **Password** field, type **pass**.
51. Click the **Logon** button.
52. On the **Main Panel**, double-click the **Pipeline** icon.
53. On the **Pipeline** panel, double-click the **PM to Server Pipeline** icon. SiteManager displays the **PM to Server Pipeline** window.
54. Click the **Open** button.
55. In the **Contract** list box, scroll to and double-click Contract **CNB022M**.
56. Click the **DWR Select** tab.
57. In the **DWRs** list box, click the DWR created by **Warren, Jackie** on **04/17/05**.
58. Click the **Add** button.
59. Click the **Pipeline Summary** tab.
60. Click the **Services** menu and click **Pipeline Data**. The progress of the download is shown in the **Pipeline Status** field. A message confirms that the data is downloaded.
61. Click the **Exit** button.

Now let's log on again as the Project Supervisor or the Lead Inspector.

62. Double-click the **SiteManager Training** program icon on the desktop.
63. In the **User ID** field, type **jj05753**.
64. In the **Password** field, type **pass**.
65. Click the **Logon** button.

Now, let's authorize the DWR in the Diary.

66. On the **Main Panel**, double-click the **Daily Work Reports** icon.
67. On the **Daily Work Reports** panel, double-click the **Diary** icon.
68. On the toolbar, click the **Open** button. SiteManager displays the Contract ID window.
69. From the **Contract ID** selection list, double-click Contract **CNB022M**.
70. From the **Date** selection list, double-click **04/17/2005**.
71. In the **Inspector** list box, click the DWR for **Warren, Jackie**.

72. Click the **Preview DWR** button.
73. Review the DWR.
74. Click the **Close** button to close the DWR Preview.
75. Click the **Authorized** check box (ON).
76. Click the **Save** button.
77. Click the **Close** button.

Viewing the History of Daily Work Reports

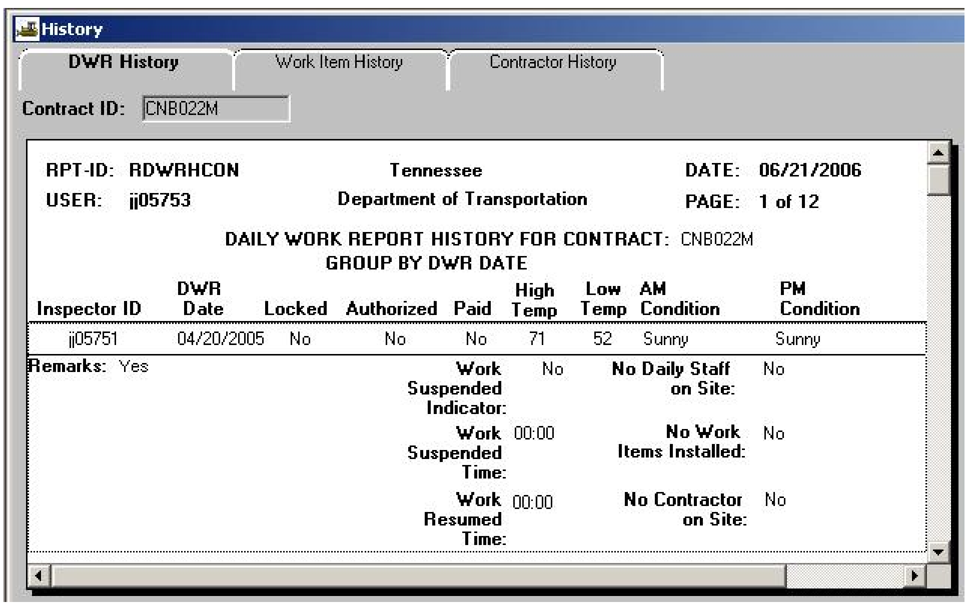
The Daily Work Reports History window displays Daily Work Report records for the selected Contract. To run history reports, the User must select a Contract when the History panel first opens and displays a selection list of contracts. The history reports display all Daily Work Report records for the selected Contract. The User can view the reports on-line or print the reports. The History panel has the following folder tabs:

- DWR History
- Work Item History
- Contractor History

Reports are sorted by DWR "Dates" only.

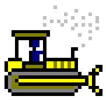
DWR History

The DWR History folder tab displays a history of all of the Daily Work Reports available to the current User. This report groups all the Daily Work Reports by date and inspector, in ascending order. Weather conditions, temperatures, and work suspended times are examples of the information shown on this report. The User can view the report on-line or print the report.



The DWR History Folder Tab

Figure 7-10



Exercise 7-8

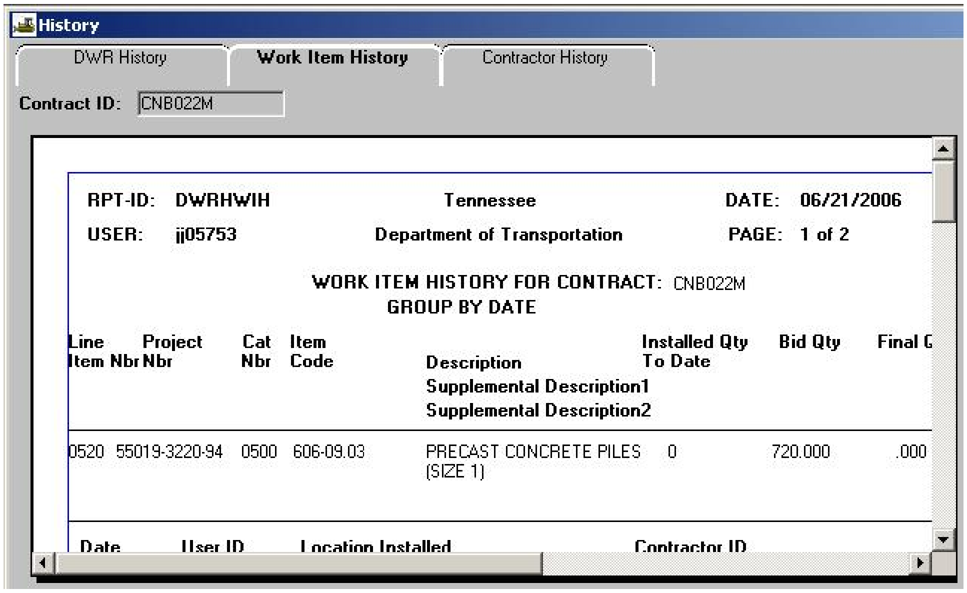
In the following exercise, you will view the History of the DWRs for Contract CNB022M.

User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022M**

1. On the **Daily Work Reports** panel, double-click the **History** icon.
2. Click the **Down Arrow** button to view the DWRs for Contract **CNB022M**.
3. What were the high temperature and morning weather conditions as recorded by **jj05751** on **04/20/05**?
   71 DEGREES AND SUNNY

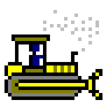
Work Item History

The Work Item History report displays a history of all work items recorded in the Daily Work Reports for the selected Contract. The contract must be selected from the contract selection list that appears when the History icon is clicked. The User can view the report on-line or print it.



The Work Item History Folder Tab

Figure 7-11



Exercise 7-9

In the following exercise, you will view the history of work items for Contract CNB022M.

User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022M**

1. On the **History** window, click the **Work Item History** folder tab.
2. Click the **Down Arrow** button to view the work items for Contract **CNB022M**.
3. What quantity reported to date did **jj05751** record for Line Item Number **0520** on **04/20/05**?

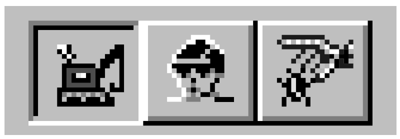
   114.0

Contractor History

The Contractor History folder tab 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.

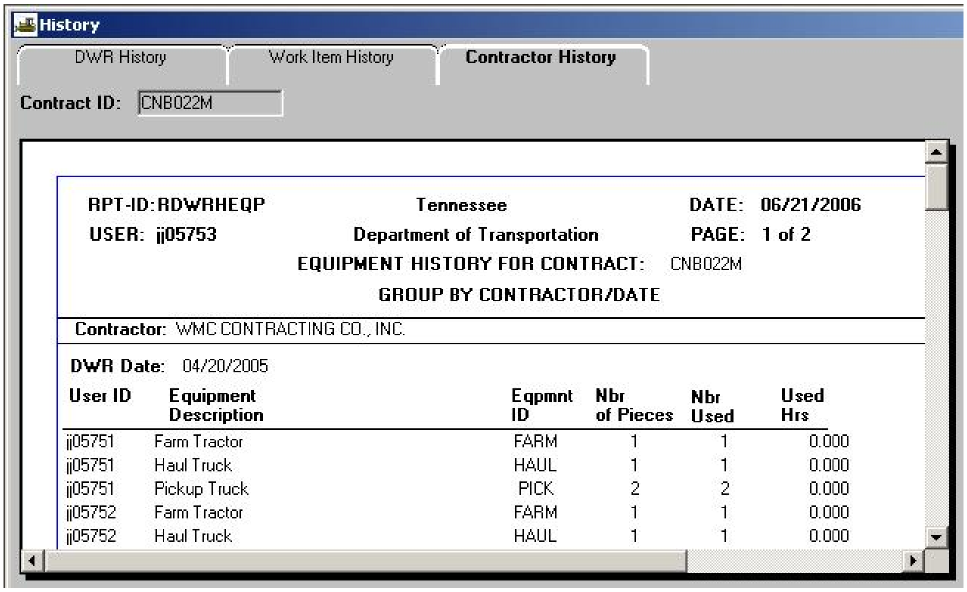


Equipment History, Supervisor History, and Variable Labor History Buttons

The Contractor History Toolbar Buttons

Figure 7-12

Equipment History Report


History

DWR History | Work Item History | Contractor History

Contract ID: CNB022M

RPT-ID: RDWRHEQP — Tennessee — DATE: 06/21/2006
USER: jj05753 Department of Transportation PAGE: 1 of 2
EQUIPMENT HISTORY FOR CONTRACT: CNB022M
GROUP BY CONTRACTOR/DATE

Contractor: WMC CONTRACTING CO., INC.

DWR Date: 04/20/2005

User ID	Equipment Description	Eqpmnt ID	Nbr of Pieces	Nbr Used	Used Hrs
jj05751	Farm Tractor	FARM	1	1	0.000
jj05751	Haul Truck	HAUL	1	1	0.000
jj05751	Pickup Truck	PICK	2	2	0.000
jj05752	Farm Tractor	FARM	1	1	0.000
jj05752	Haul Truck	HAUL	1	1	0.000

The Contractor Equipment History Report

Figure 7-13

Supervisor History Report


History

DWR History | Work Item History | Contractor History

Contract ID: CNB022M

RPT-ID: RDWRHSUP — Tennessee — DATE: 06/21/2006
USER: jj05753 Department of Transportation PAGE: 1 of 1
SUPERVISOR HISTORY FOR CONTRACT: CNB022M
GROUP BY CONTRACTOR/DATE

Contractor: WMC CONTRACTING CO., INC.

DWR Date: 04/20/2005

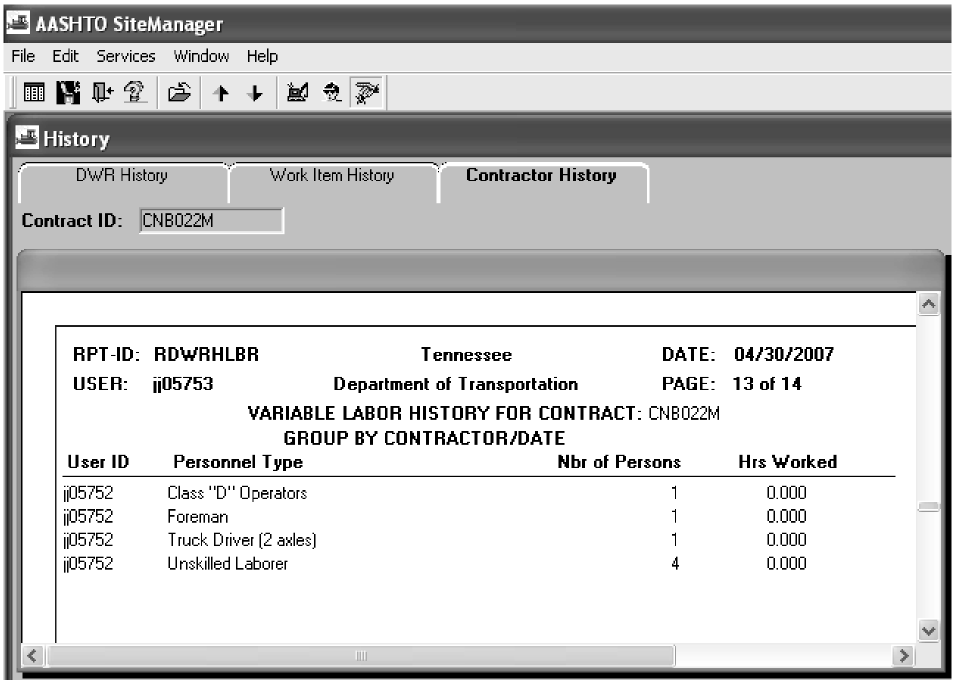
Contractor: VOLUNTEER BRIDGE CONSTRUCTION, INC.

DWR Date: 04/20/2005

The Contractor Supervisor History Report

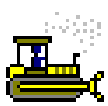
Figure 7-14

Variable Labor History Report



The Contractor Variable Labor History Report

Figure 7-15



Exercise 7-10

In the following exercise, you will select and view Contractor History Reports for Contact CNB022M.

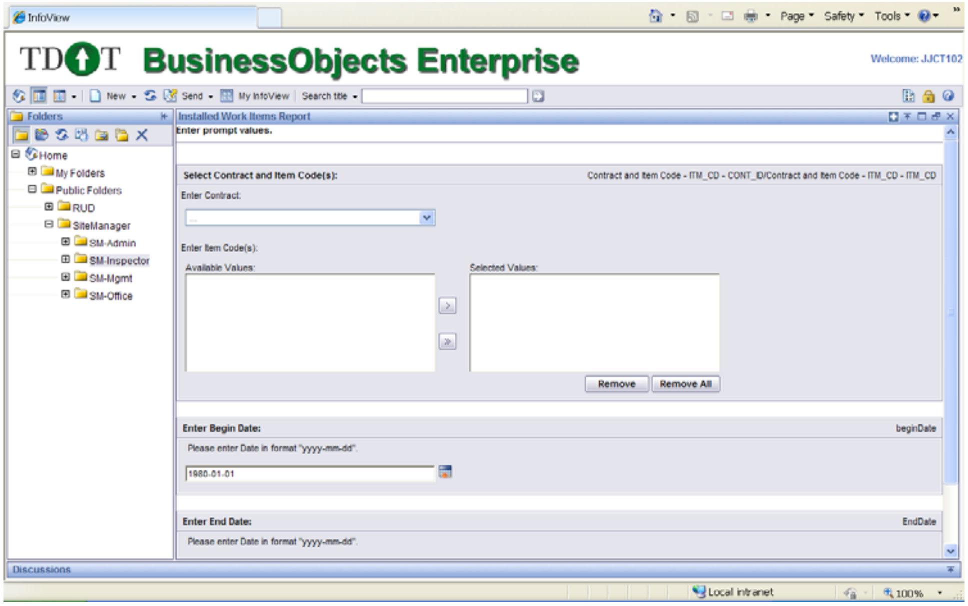
User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022M**

1. On the **History** window, click the **Contractor History** folder tab.
2. The **Equipment History** report displays automatically.
3. What piece(s) of equipment and the number used did **jj05752** record for **WMC CONTRACTING CO., INC.** on the DWR Date of **04/20/05**? **One Farm Tractor, One Haul Truck, and Two Pickup Trucks**
4. Click the **Variable Labor History** button.
5. What **Personnel Types** did **jj05752** record onsite for **WMC CONTRACTING CO., INC.** on **04/20/05**? **Class "D" Operators, Foreman, Truck Driver (2 axels), and Unskilled Laborer**
6. Click the **Close** button.

Viewing the Inspector's Report of Installed Work Items

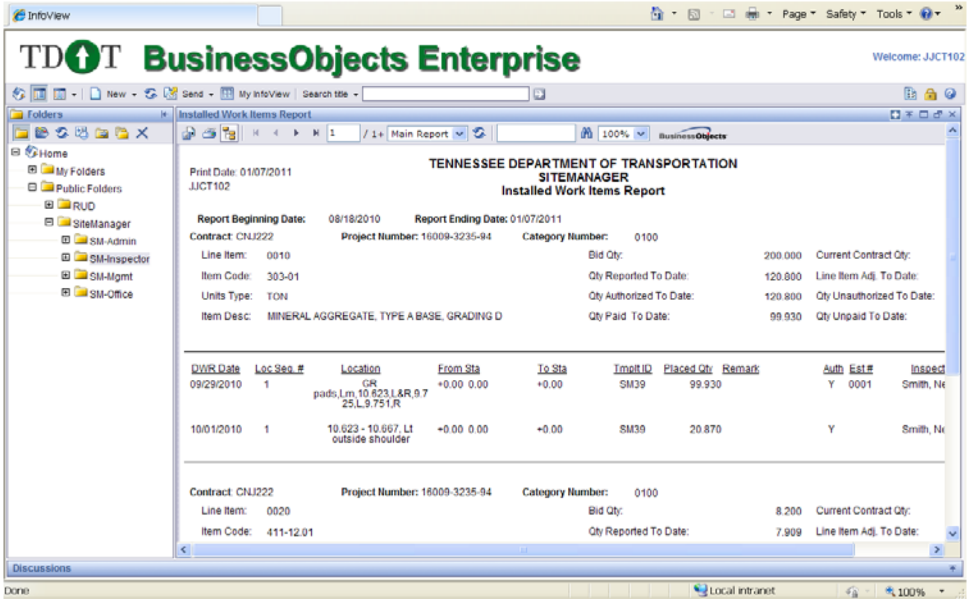
The Inspector's Report of Installed Work Items is a TDOT custom report that shows the Dates Locations, and Quantities for work items installed on a contract.

We cannot view TDOT custom reports in the training environment.



Inspectors Report of Installed Work Items – Parameters window

Figure 7-16

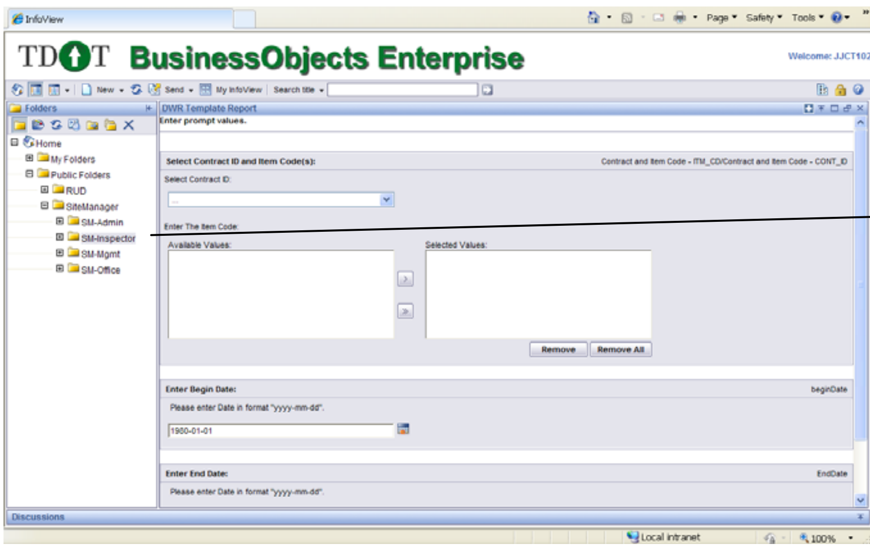


Inspectors Report of Installed Work Items

Figure 7-17

Viewing the DWR Template Report

The DWR Template Report is a TDOT custom report that shows all of the DWR Templates used for a contract. In TDOT, the DWR Template Report is used to print a list of all DWR Templates for the items and time period chosen. This will allow staff to view the DWR template entries for multiple items and time periods at the same time.

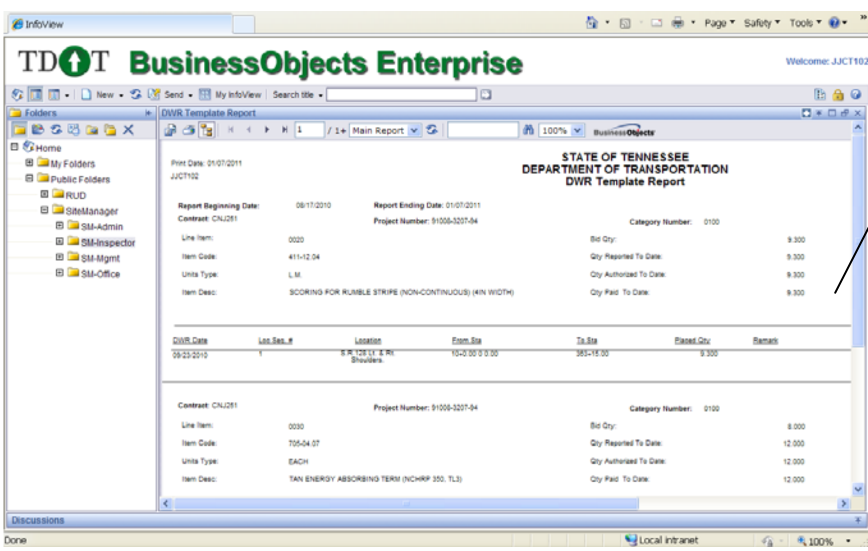


Accessed from the SM-Inspector folder.

DWR Template Report – Parameters window

Figure 7-18

Under the report line after the DWR information, the DWR Template data is listed in standard columns from left to right regardless of how it is laid out on the real DWR Template. This standard layout allows *all* DWR Templates to be displayed on the same report.

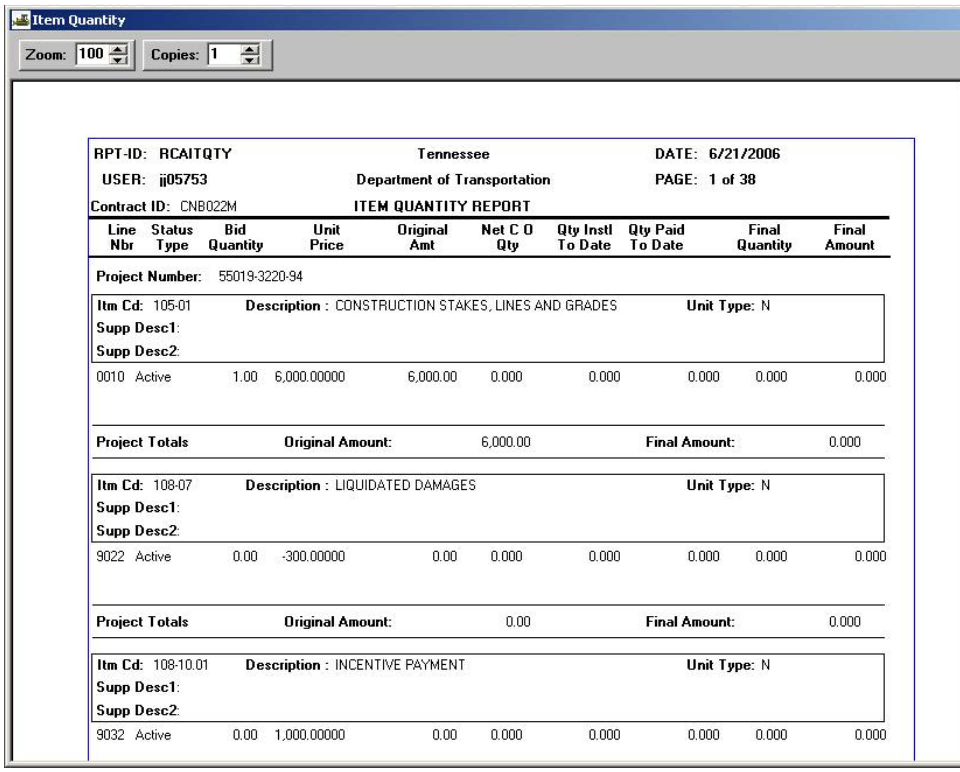


DWR Template Report

Figure 7-19

Viewing the Item Quantity Report

The Item Quantity Report lists all Contract Item quantities that are found in the database based on user-selected criteria. This report can be generated on all Contract Items (this is, Original, Change Order, Current, Installed, Paid, and Final). The Items are grouped by Item Code and Project Number. An Item cost summary is displayed for each group. The User can view the report on-line or print the report.



This report is sortable by most of the column headings.

The Item Quantity Report

Figure 7-20

Exercise 7-11

In the following exercise, you will view the Item Quantity Report for Contract CNB022M.

User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022M**

1. Click the **Main Panel** folder tab.
2. On the **Main Panel**, double-click the **Contract Administration** icon.
3. On the **Contract Administration** panel, double-click the **Reports (CA+)** icon.
4. On the **Reports (CA+)** panel, double-click the **Item Quantity** icon.
5. Using the *right* mouse button, click the **Contract ID** field
6. In the object menu, click **Search**.
7. In the list box, scroll to and double-click **CNB022M**.
8. Click the **All Item Status** check box (ON).
9. Click the **OK** button.
10. Click the **Close** button.

Review for Section 7

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 Diary Authorize folder tab lists the Daily Work Reports 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. Click the **Save** button.
8. Click **Ok**.

To preview a Daily Work Report:

1. On the **Daily Work Reports** panel, double-click the **Diary** icon.
2. Click the **Open** button.
3. In the **Contract** list box, scroll to and double-click the desired Contract.
4. In the **Diary** list box, scroll to and click the DWR Date of the Diary. (The DWR Date represents both the Daily Work Report Date and the Diary Date.)
5. Click **Ok**.
6. In the **Inspector** list box, scroll to and click the Inspector who submitted the Daily Work Report to be previewed.
7. Click the **Preview DWR** button.
8. To close the print preview window, click the **Close** button.

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 Daily Work Report to be authorized.
4. Click 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 Daily Work Report to be authorized.
4. Click the **Authorized** check box (O).
5. Click the **Save** button.

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** folder 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** drop-down list, click the expand arrow and click 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. An empty row is inserted.
7. In the **Milestone** drop-down list, click the expand arrow and click the milestone to apply the charge or credit to.
8. In the **Charge Amount** drop-down list, click the expand arrow and click Full Day or No Charge.
9. If No Charge is entered as the Charge Amount for the milestone, in the **Credit Reason** drop-down list, click the expand arrow and click the reason for a credit.
10. Click the **Save** button.

To access TDOT custom reports:

1. Launch Internet Explorer.
2. Access web address **http://boe.tdot.state.tn.us/businessobjects/Enterprise115/InfoView/**
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 Select Contract panel opens.
2. In the **Contract** list box, scroll to and click the Contract ID.
3. Click **Ok**. The **DWR History** folder tab is displayed.
4. Click the **Down Arrow** button to view the DWRs.

To run the Installed Work Report:

1. On the **Main Panel**, double-click the **Contractor Payments** icon.
2. On the **Contractor Payments** panel, double-click the **Reports** icon.
3. On the **Reports** panel, double-click the **Installed Work** icon.
4. In the list box, select the appropriate contract.
5. Click the **OK** button.
6. To close the report, click the **Close** button.

To view Item Quantity Report:

1. On the **Contract Administration** panel, double-click the **Reports** icon.
2. On the **Reports** panel, double-click the **Item Quantity** icon.
3. Using the right mouse button, click the **Contract ID** field. In the object menu, click **Search**.
4. In the list box, scroll to and double-click desired contract.
5. In the **Item Status** drop-down list, click the **All item status** checkbox.
6. Click the **OK** button to generate the contract.

Summary Exercise for Section 7

In the following exercise, you will create a Diary and review activities on Contracts CNB022L.

User ID: **jj05753** Group: **PJSUPS** Mode: **Server** Contract: **CNB022L**

1. Create a new Diary for Contract **CNB022L** on **04/18/05**.
2. Preview **Jackie Warren's** Daily Work Report for **04/18/05**.
3. Authorize **Jackie Warren's** Daily Work Report for **04/18/05**.
4. Open the Diary Date **11/15/05** for Contract **CNB022L.** Unauthorize the DWR created by User ID **jj05752** (Gutierrez, Sandy).
5. Log on in **Server** mode as **jj05752.**
6. Pipeline DWR date **11/15/05** on Contract **CNB022L** for **jj05752** (Gutierrez, Sandy) to **Standalone** mode.
7. Exit SiteManager.
8. Log on in Standalone mode as **jj05752.**
9. Correct the reporting error for Contract **CNB022L** on DWR Date **11/15/05** for Item Code **712-06**, **SIGNS (CONSTRUCTION),** Project Number **55019-3220-94**, Line Item Nbr **0310** on template **SM22A**. Change the # of Signs value to **4.**
10. Exit SiteManager.
11. Log on in **Server** mode as **jj05752**.
12. **Pipeline** DWR date **11/15/05** for **jj05752** back to Server mode.
13. Exit SiteManager.
14. Log on in **Server** mode as User ID **jj05753.**
15. **Authorize** the corrected DWR.
16. Preview the DWR History, Work Item History, and Contractor History for **CNB022L**.
17. View the Item Quantity Report for **CNB022L**.
18. View the Installed Work Report for **CNB022L**.
19. Exit SiteManager.

Learning Module

Section 8 Estimate Basics & Progress Estimates

for Field Documentation

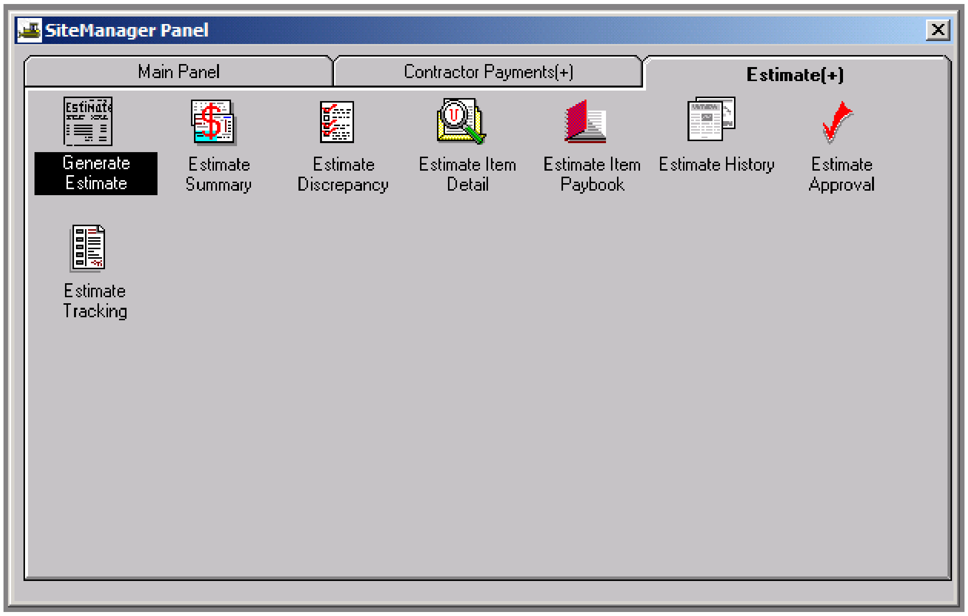
By the end of this module, you will be able to:

- View the Estimate Summary
- View Estimate Discrepancies
- View the Estimate Item Detail
- View the Estimate Item Paybook
- Generate the Summary To Contractor Report

SiteManager Estimates Overview

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

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



The Estimate Panel

Figure 8-1

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

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

TDOT Estimate Generation Schedule

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

Region	**First DWR Date**	**Ending DWR Date (Estimate End Date)**	**First Day Office Staff Can Generate Estimate**
Region 1	21^{st} day of the previous month	Through 20^{th} day of the current month	21^{st} day of the current month
Region 2	1^{st} day of the previous month	Through the last day of the previous month	1^{st} day of the current month
Region 3	1^{st} day of the previous month	Through the last day of the previous month	1^{st} day of the current month
Region 4	16^{th} day of the previous month	Through the 15^{th} day of the current month	16^{th} day of the current month

The TDOT Progress Estimate Generation Schedule

Table 8-1

TDOT Progress Estimate Generation Workflow

INSPECTION STAFF

The Inspection staff will complete the following pre-estimate planning and verification tasks prior to estimate generation:

Progress Estimate Planning & Verification Tasks	Functional Navigation
Lead Inspector/Inspector will check-in (Pipeline) all DWRs to the server through the ending DWR date as outlined in the PM to Server chapter.	Pipeline > PM to Server Pipeline
If the contract is a Maintenance Contract the inspector will access the Adjustments Plug-In to see if there are any missing MMS Templates.	Contract Administration > Contract Records > Contracts > Plug-In > Adj. Plug-In
Lead Inspector will run the Unauthorized DWR Report to find the applicable DWRs that have not been authorized.	TDOT Custom SM Report Accessories > System Attachments
As needed, Lead Inspector will run and review the Installed Work Report to help determine which unauthorized DWRs should be authorized for the estimate. Lead Inspector may also need to review the DWRs and other reports to help with this determination.	Contractor Payments > Reports > Installed Work
As needed, Lead Inspector will create any missing Diaries for the estimate period and authorize all applicable DWRs that have not been authorized to date. In TDOT, a Diary is to be created for each day of the period covered by the estimate for the life of the Contract.	Daily Work Reports > Daily Work Reports or Diary
Lead Inspector notifies Office Staff that all DWRs have been checked in and are ready to be included in an estimate.	External

TDOT Estimate Planning & Verification Task

Table 8-2

TDOT Progress Estimate Correction Workflow

If a discrepancy is displaying due to an error recorded on a DWR, the Office staff will not override the discrepancy. Instead, the Office Staff and Inspection Staff will complete the following tasks as part of the estimate correction process to update the DWR error:

Estimate DWR Correction Workflow Tasks	Functional Navigation
1. Office Staff will delete the pending estimate if a correction must be made to a DWR/Diary for the estimate period. If an adjustment has been made to the estimate, the adjustment plug-in must be used to place the estimate back in pending status prior to deleting the estimate.	Contractor Payments > Estimate > Estimate History
2. Office Staff / Lead Inspector will unauthorize the DWRs that need to be corrected. Note: DWRs created by Office Staff should be unauthorized by the Office Staff; DWRs created by Inspection Staff should be unauthorized by the Lead Inspector.	Daily Work Reports > Diary
3. DWR Creator (Inspectors only) will pipeline the DWR to standalone mode to correct the DWR. Note: Office Staff DWRs are created and corrected in Server mode. Inspection Staff DWRs are created and corrected in Standalone mode.	Pipeline > Server to PM
4. DWR Creator corrects the DWR.	Daily Work Reports > DWR
5. DWR Creator (Inspectors only) will pipeline the DWR to server mode after correcting the DWR	Pipeline > PM to Server
6. Office Staff / Lead Inspector will authorize the corrected DWR. Note: DWRs corrected by Office Staff should be authorized by the Office Staff; DWRs corrected by Inspection staff should be authorized by the Lead Inspector.	Daily Work Reports > Diary
7. Office Staff will generate the Estimate and repeat the Progress Estimate Generation Workflow.	Contractor Payments > Estimates > Generate Estimate

The TDOT Progress Estimate Correction Workflow

Table 8-3

In TDOT, every effort should be made to correct the estimate prior to running the adjustment plug-ins following the workflow above. Only after being satisfied that the item quantities are correct should the Office Staff run the adjustment plug ins to adjust the pay amount of the estimate.

Exercise 8-1

In the following exercise, you will navigate to the Estimates panel.

User ID: **jj05751** Group: **INSP**

1. Double-click the **SiteManager Training** program icon on your desktop.
2. In the **User ID** field, type **jj05751**.
3. Press the **Tab** key.

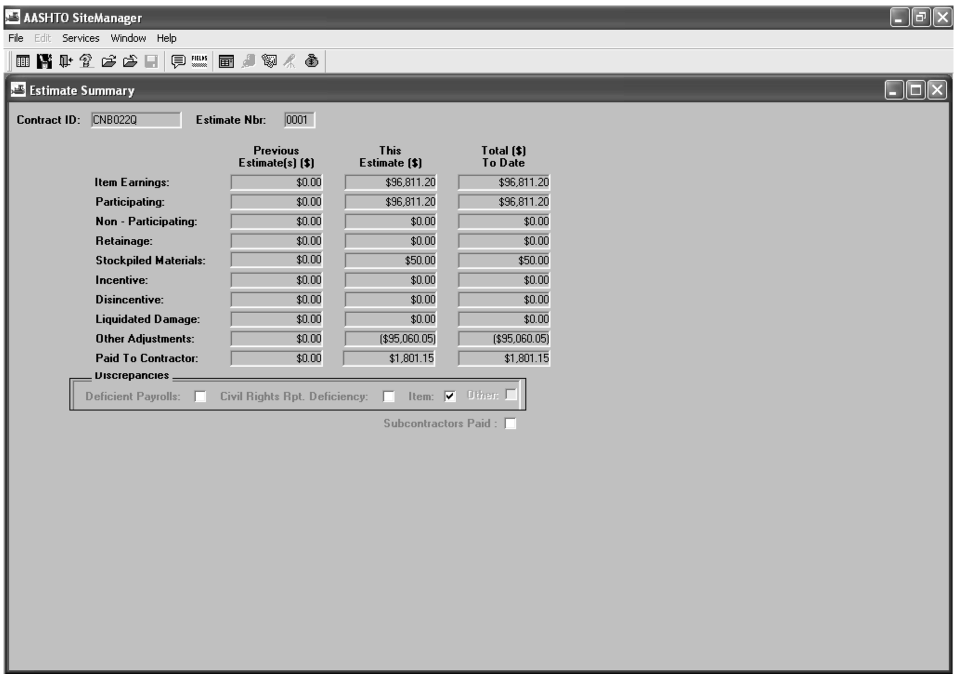
Shift-tab if user ID not highlighted.

4. In the **Password** field, type **pass**.
5. Press the **Enter** key.
6. Double-click the **Contractor Payments** icon.
7. On the Contractor Payments icon, double-click the **Estimate** icon.

Viewing the Estimate Summary

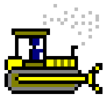
The Estimate Summary window allows the User to view calculated Estimate summary information. It may be accessed from the Estimate panel or from the In-Box. The window shows three sets of totals:

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



The Estimate Summary Window

Figure 8-2



Exercise 8-2

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

User ID: **jj05751** Group: **INSP** Contract: **CNB022Q**

1. On the **Contractor Payments** panel, double-click the **Estimate** icon.
2. On the **Estimate** panel, double-click the **Estimate Summary** icon.
3. In the **Contract ID** list box, scroll to and double-click Contract **CNB022Q**.
4. In the **Estimate** list box, double-click estimate number **0001**.
5. What is the amount paid to the contractor on this estimate?
   $1,801.15
6. Are there discrepancies on this estimate? **YES – Item**
7. Click the **Close** button.

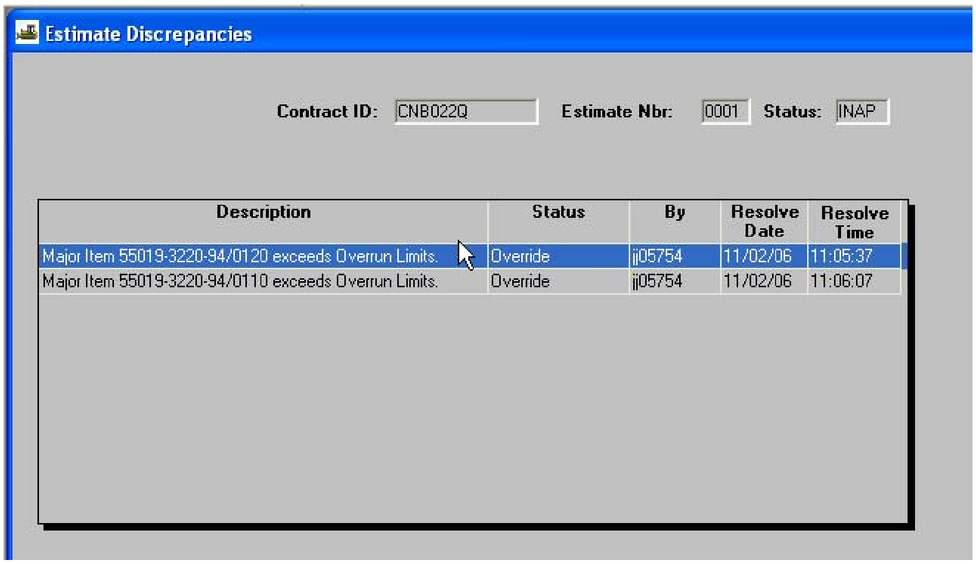
Viewing Estimate Discrepancies

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

Two options with discrepancies:

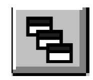
- **Override with comment**
- **Resolve and recalculate**

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



The Estimate Discrepancy Window

Figure 8-3



The Navigate Button

Figure 8-4

TDOT Discrepancy Types

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

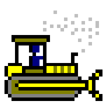
Overrun Discrepancy – Occurs if a major item is overrun by 10% or more and a minor item overrun by 999.99% or more.

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

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

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

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



Exercise 8-3

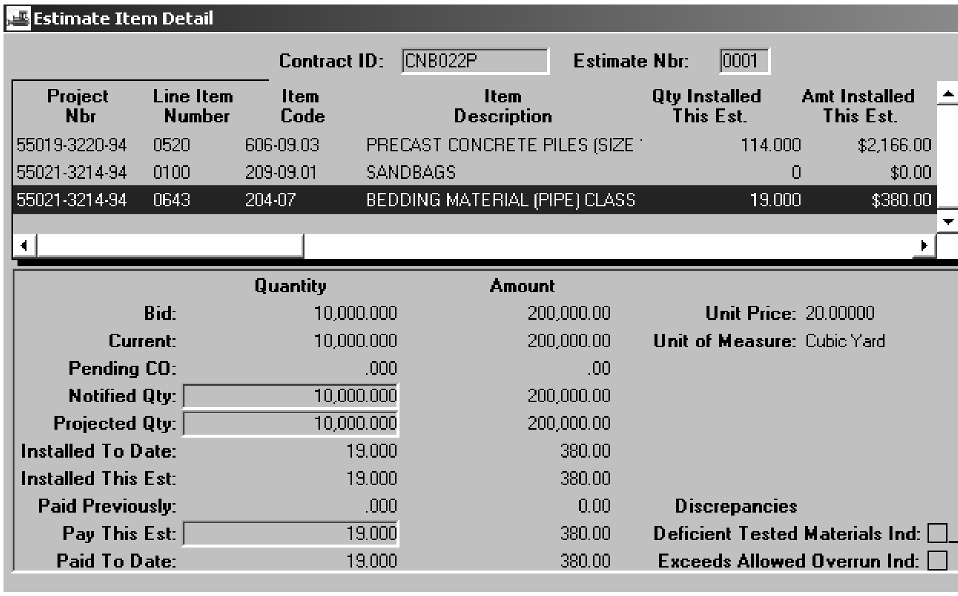
In the following exercise, you will view the Estimate Summary window for contract CNB022Q.

User ID: **jj05751** Group: **INSP** Contract: **CNB022Q**

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon.
2. Click the discrepancy that says **Major Item 55019-3220-94/0120 exceeds Overrun Limits**.
3. Click the **Remarks** button.
4. What is the reason for this Override?
   Change order to increase quantity is Pending.
5. Click the **Remarks** button.
6. Click the discrepancy that says **Major Item 55019-3220-94/0110 exceeds Overrun Limits**.
7. Click the **Remarks** button.
8. What is the reason for this Override?
   Change order to increase quantity is Pending.
9. Click the **Remarks** button.
10. Click the **Close** button.

Viewing the Estimate Item Detail

The Estimate Item Detail window displays the Item quantities from approved Daily Work Reports.



The Estimate Item Detail Window

Figure 8-5

These Discrepancy indicators only display when viewing ONE PENDING estimate, rather than All.

In TDOT, the Office Staff and Project Supervisor may view the Estimate Item Detail window to verify the item quantities for payment on the Estimate.

Note: If there is no Pending or Rejected estimate for the Contract, you will see cumulative totals for all items on estimates

Exercise 8-4

In the following exercise, you will view the Estimate Item Detail for all items on contract CNB022Q.

User ID: **jj05751** Group: **INSP** Contract: **CNB022Q**

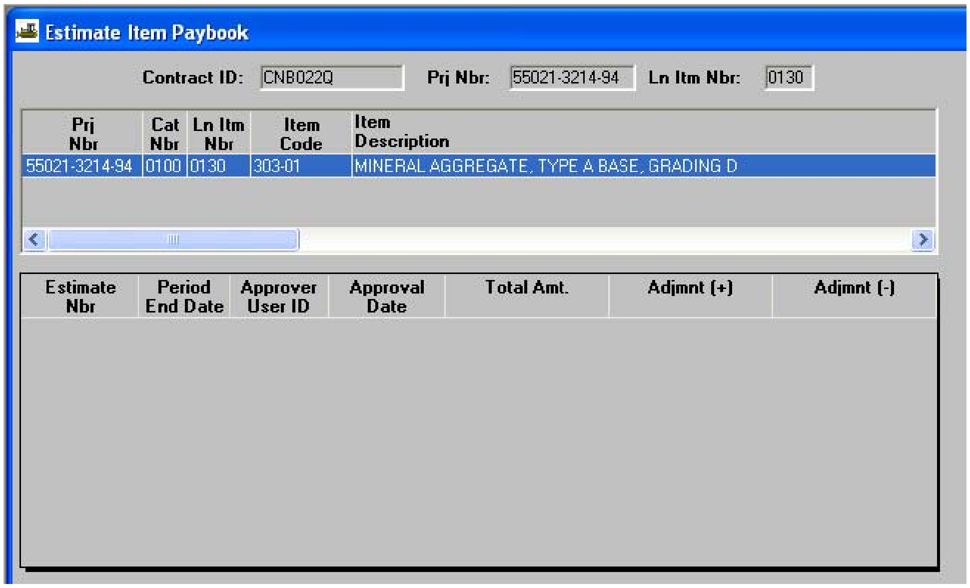
1. On the **Estimate** panel, double-click the **Estimate Item Detail** icon.
2. Click **Yes** to the message “There is no Pending or Rejected estimate for this contract. Do you want to see items for all estimates?”

Currently, there is only one estimate for this contract.

3. In the list box, scroll to and click the record for Project Nbr **55021-3214-94**, Line Item Number **0643,** Item Code **204-07, BEDDING MATERIAL**.
4. Has this item been included on an estimate? **Yes**
5. What quantity was installed to date for this item?
   19.000
6. What amount was paid to date for this item?
   $380.00
7. In the list box, scroll to and click the record for Project Nbr **55019-3220-94**, Line Item Number **0310,** Item Code **712-06**, **SIGNS (CONSTRUCTION).**
8. What quantity was installed to date for this item?
   24.0
9. What amount was paid on this estimate for this item?
   $228.00
10. In the list box, scroll to and click the record for Project Nbr **55021-3220-94**, Line Item Number **0110,** Item Code **307-01.01**, **ASPHALT CONCRETE MIX.**
11. What quantity was installed to date for this item?
    1413
12. What amount was paid to date for this item?
    $55,107.00
13. Browse the items to see what work has been done on this contract.
14. Click the **Close** button.

Viewing the Estimate Item Paybook

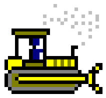
The Estimate Item Paybook is an inquiry only window showing the payment history for a Contract Item. The Item payment history displays in reverse chronological order meaning the current Estimate Item displays on the first row. Thus, it is possible that the first row is not yet paid. Whether the first row is paid or not can be determined by the Approver User ID. If the Approver User ID is the final reviewer (HQ Finance), then the item has been paid.



The Estimate Item Paybook Window

Figure 8-6

In TDOT, the Estimate Item Paybook may be used to check amounts paid on each Estimate for a particular item.



Exercise 8-5

In the following exercise, you will view the Estimate Item Paybook for Estimate 0001 for contract CNB022Q.

User ID: **jj05751** Group: **INSP** Contract: **CNB022Q**

1. On the **Estimate** panel, double-click the **Estimate Item Paybook** icon.
2. In the **Contract** list box, scroll to and double-click Contract ID **CNB022Q**.
3. In the **Line Item** list box, scroll to and double-click Prj Nbr **55019-3220-94**, Ln Itm Nbr **0130,** Item Cd **303-01,** Desc **MINERAL AGGREGATE, TYPE A BASE, GRADING D**.
4. Has this item been included on an estimate? **NO**
5. Click the **Open** button.
6. In the **Line Item** list box, scroll to and double-click Prj Nbr **55019-3220-94,** Ln Itm Nbr **0500,** Item Cd **606-09.01,** Desc **TEST PILES (PRECAST CONCRETE, SIZE 1)**.
7. Has an adjustment been applied to this item? **YES**
8. Click the **Open** button.
9. In the **Line Item** list box, scroll to and double-click Prj Nbr **55019-3220-94,** Ln Itm Nbr **0310,** Item Cd **712-06,** Desc **SIGNS (CONSTRUCTION)**.
10. Has an adjustment been applied to this item? **YES**
11. Click the **Open** button.
12. In the **Line Item** list box, scroll to and double-click Prj Nbr **55019-3220-94,** Ln Itm Nbr **0110,** Item Cd **307-01.01,** Desc **ASPHALT CONCRETE MIX**.
13. Has an adjustment been applied to this item? **YES**
14. Click the **Close** button.
15. Click the **Contractor Payments** folder tab.

Generating the Summary to Contractor Report

The Summary to Contractor report displays the amounts to be paid to the Contractor based on the estimate. The report summarizes previous payments made to the Contractor and the current status of the Contract when the estimate is generated. An itemized description of quantities and amounts on all items in every project contained in the estimate is also given.

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

Rpt-ID: RCPCSUM1 **Tennessee** **Date:** 11/02/2006
User: **Department of Transportation**
Estimate Summary to Contractor

Vendor ID: 0000085434 **Vendor Name:** VOLUNTEER BRIDGE CONSTRUCTION, INC.

Contract ID: CNB022Q **Estimate Number: 0001** **Pay Period:** 04/14/2005 **to:** 05/15/2005

INSIDE IF CONDITION
Contract Location:
Const. of Conc. I-Bm Br. on SR 224 over Lick Crk LM 1.47

Time Allowed: 0.0 days
Time Charged: 31.0 days
Elapsed Calendar Days: 31.0 days
Percent Time: 0.00 %

Contractor:
VOLUNTEER BRIDGE CONSTRUCTION, INC.
P O Box 627
Decaturville, TN 38329
Phone:

Date Let: 02/01/2005
Date Awarded: 02/28/2005
Date Contract Executed: 03/25/2005
Date Notice to Proceed: 04/14/2005
Date Work Began: 00/00/0000
Date Time Stopped: 00/00/0000
Date Accepted: 00/00/0000

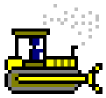
Escrow Agent:
Surety Co:
Estimate Paid: NO

Report needs to be printed in Landscape.

The Estimate Summary to Contractor Report
Figure 8-7

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

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



Exercise 8-6

In the following exercise, you will generate the Summary to Contractor Report for Estimate 0001 for contract CNB022Q.

User ID: **jj05751** Group: **INSP** Contract: **CNB022Q**

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

   See the Review for steps to run in Production.

   STOP. Do not submit the process in SiteManager Training.
4. Click the **Cancel** Button
5. Click the **Close** Button.

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

Review for Section 8

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 open an Estimate summary:

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

To open an Estimate discrepancy:

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

To view an Estimate item:

1. On the **Estimate** panel, double-click the **Estimate Item Detail** icon.
2. In the list box, scroll to and click the desired Contract.
3. Click **Ok**.
4. Click the **Service** menu and click the **View Estimate** choice.
5. When complete, click the **Save** button.

To view the Estimate Item Paybook:

1. On the **Contractor Payments** panel, double-click the **Estimate** icon.

1. On the **Estimate** panel, double-click the **Estimate Item Paybook** icon.
2. In the list box, scroll to and double-click the desired Contract.
3. In the list box, scroll to and click the desired Line Item.
4. When complete, click the **Close** button.

To generate the Summary to Contractor Report:

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

Summary Exercise for Section 8

In the following exercise, you will review Estimate 001 for contract CNB022G.

User ID: **jj05751** Group: **INSP** Contract: **CNB022G**

1. Navigate to the **Estimate Summary** window. Open the summary for Contract **CNB022G**, Estimate **0001**.
2. What are the Item Earnings for Estimate Nbr. **0001**? **$21,454.05**
3. Are there discrepancies on Estimate Nbr. **0001**? **YES**
4. Navigate to the **Estimate Discrepancy** window. What discrepancies exist for Contract **CNB022G**, Est Nbr **0001,** Period End Date **05/15/05**?
   Event Traffic Control Checklist and
   Storm Water Inspection Report Checklist Events
5. What window is used to correct these discrepancies?
   Main Panel > Contract Administration .> Contract Records > Checklist Event Dates.
6. View **Estimate Item Details** for Line Item Number **0330**. What quantity was paid on this estimate? **120**
7. What is the purpose of the Summary to Contractor Report?
   SEND COPY OF ESTIMATE TO THE CONTRACTOR
8. Navigate back to the **Main Panel**.

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Section 9 Contract Midlife Activities

for Field Documentation

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

- View the Actual Date of a Checklist Event
- View a Key Date
- Correct Quantities for Approved Progress Estimates
- View QTY ADJ DWRs

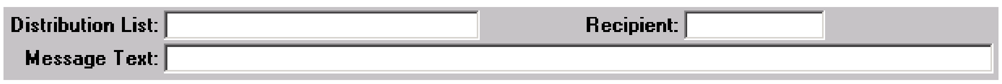
Dates in SiteManager

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

Critical Dates are not updated by field personnel.

The first three, Critical Dates, Key Dates, and Checklist Events are very powerful because they can send SiteManager Inbox messages as reminders to an individual Recipient or to a Distribution List of recipients.



The Standard Date Addressing and Message Objects of SiteManager

Figure 9-1

TDOT uses Recipients only and not Distribution Lists.

Date Type	When the Message Is Sent	Who the Message Is Sent To	Message Text
Critical Dates (Single Occurrence)	When a value is entered in the Actual Date Field by a Headquarters User.	In-box of either the Recipient or the Distribution List indicated.	The text defined in the *Message Text* field.
Key Date (Single Occurrence)	When the Projected Date of the Key Date is reached before the Actual Date is entered.	In-box of the user whose User ID is identified in the Project Manager field on the Primary Personnel folder tab of the Contract window.	The projected date was missed.
	When a value is entered in the Actual Date Field by a User.	In-box of either the Recipient or the Distribution List indicated.	The text defined in the *Message Text* field.
Checklist Event Dates (May be used for multiple occurrences)	When the Projected Date of the Checklist Event is reached before the Actual Date is entered.	In-box of either the Recipient or the Distribution List indicated.	The text defined in the *Message Text* field.
Milestone	When the Scheduled Completion Date is reached before the Actual Completion Date entered.	Message appears in the Estimate Discrepancy window after estimate is generated for the period in which the milestone was missed.	*Milestone XXX is not reached*

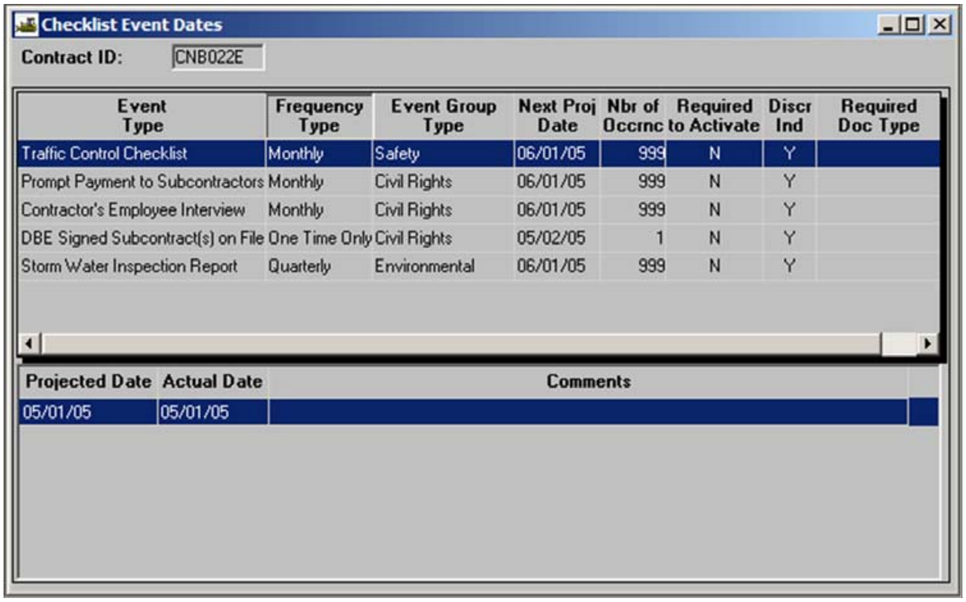
SiteManager Dates

Table 9-1

Viewing Checklist Event Dates

The Checklist Event Dates panel lists the scheduled events for the selected contract. The data for the event selected in the top datawindow is displayed in the bottom datawindow. The data shows a chronological history of each occurrence of a repetitive scheduled event and the Actual Date recorded by the Office Staff for each occurrence. This panel lets the Office Staff record the actual dates of the Checklist Scheduled Events and add or delete Checklist Event Date records.

Recipients are notified when a Scheduled Event does not occur on time.



The Checklist Event Dates Window

Figure 9-2

Exercise 9-1

In the following exercise, you will view the Actual Date of Checklist Events for contract CNB022E.

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. On the **Mail 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 **Checklist Event Dates** icon.
4. Click the **Open** button.
5. In the **Contract ID** list, select Contract **CNB022E**.
6. In the **Event Type** column, scroll to and click **Storm Water**. In the lower pane, the actual date recorded by the Office Staff will be shown.
7. In the **Event Type** column, scroll to and click **Traffic Control Checklist**. In the lower pane, the actual date recorded by the Office Staff will be shown.
8. Click the **Close** button.

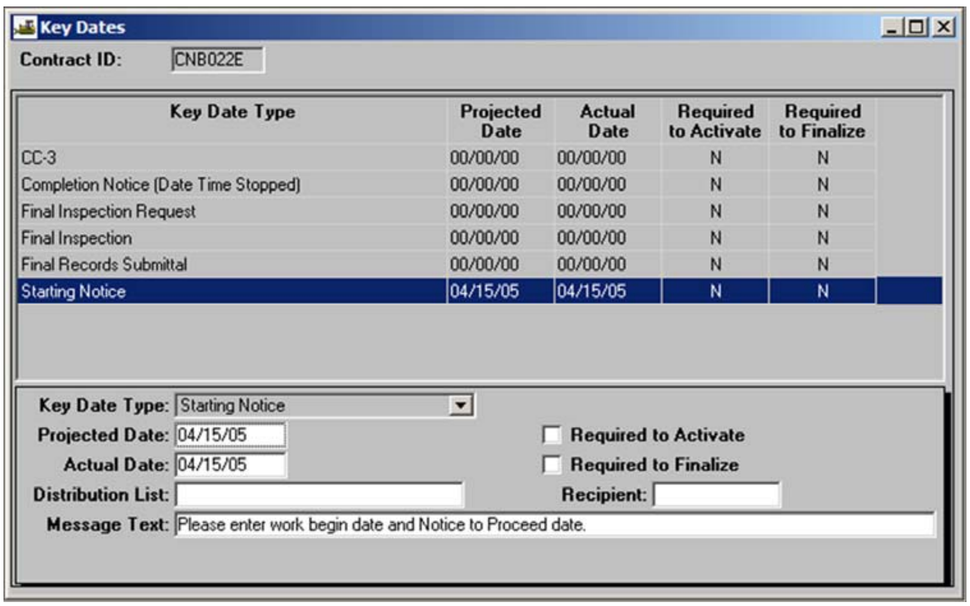
This version of the training database does not show the actual dates that the Office Staff records.

Viewing a Key Date

Key Dates are dates that are important *when they occur*. Therefore, either a single recipient or the members of a distribution list are notified when a Key Date is accomplished. The Project Manager is notified when a Key Date is *not* accomplished by the projected date. A Key Date can be set up to be required either when the Contract is activated or when it is finalized. The User creates the Key Date schedule and records the actual occurrences of Key Dates on the Key Dates panel.

Notified when entered and if not entered.

The Key Dates panel lists the Key Dates for the selected Contract in the top window. The data for the selected Key Date is displayed in the bottom window. The Key Date Types are pre-defined in the system code tables. SiteManager 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 panel. The User can add, modify, and delete the Key Dates.



The Key Dates Window

Figure 9-3

In TDOT, the Notice to Proceed Date is updated by the Headquarters Finance Office upon receipt of the Starting Notice Report.

Until the Notice to Proceed Date is entered, field data collection can begin, but estimates cannot be generated.

Key Date	Recipient	Fed/ State	Enters Date	Comment
Starting Notice	Project Supervisor designee	Both	Office Staff	Projected Date = Effective Date. Used to generate the Starting Notice report which notifies HQ Finance to fill in the Notice to Proceed and Work Begin Dates (from Critical Dates)
Final Inspection Request	Regional Construction Supervisor	Both	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates). Contract ready for final inspection.
Final Inspection	Project Supervisor designee	Both	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates). Final Inspection completed this date as inspected and Accepted Date.
CC-3	Project Supervisor designee	Fed	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates) All CC-3's have been received.
Notice of Termination	Project Supervisor designee	Both	Regional Construction	Projected Date = Adjusted Completion Date (from Critical Dates). NOT form complete. Submit Field Office Completion Notice Report.
Completion Notice (Date Time Stopped)	Project Supervisor	Both	Regional Construction	Projected Date = Adjusted Completion Date (from Critical Dates) Time charges have been stopped. The final inspection and all exceptions are complete.
Final Records Submittal	Project Supervisor designee	Both	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates) Project Records have been submitted to Final Records.
DT1696 Materials and Tests Certification	Project Supervisor designee	Both	Office Staff	Projected Date = Adjusted Completion Date (from Critical Dates). DT1696 Materials and Tests certification submitted to Regional Materials and Tests.

TDOT Default Key Dates

Table 9-2

Exercise 9-2

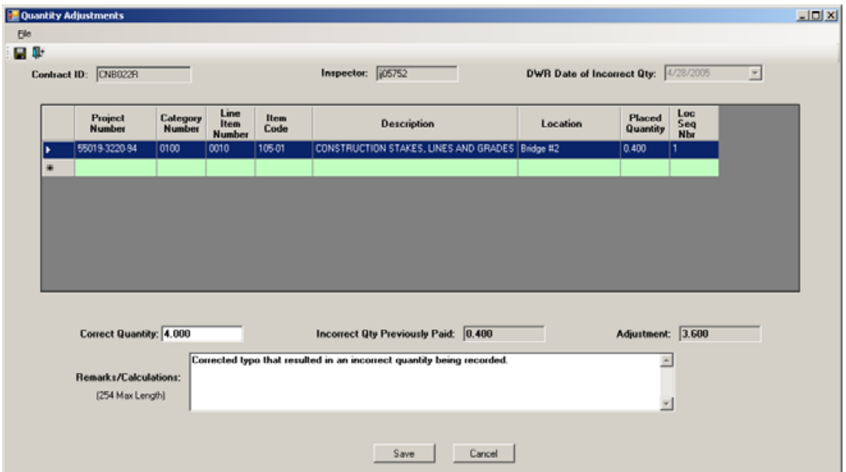
In the following exercise, you will view the Key Dates for contract CNB022E.

User ID: **jj05751** Group: **INSP** Contract: **CNB022E**

1. On the **Contract Records** panel, double-click the **Key Dates** icon.
2. In the **Key Date Type** list, click **Starting Notice**.
3. Has this date occurred? ______**Yes**______
4. Why is this date important? ______**Time starts on that day**______
5. Click the **Close** button.
6. Click the **Main Panel`** folder tab.

Correcting Quantities for Approved Progress Estimates

Use the Quantity Correction plug-in to adjust pay item quantities on Progress estimates that have reached final approval. Note that quantities on Final Estimates may not be adjusted after the estimate is approved.



The Quantity Correction Plug-in Window

Figure 9-4

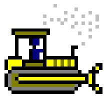
The steps to use the Quantity Correction plug-in are as follows and are detailed on the following pages.

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. Click the Save button.

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 for before the correction is included on an estimate.



Exercise 9-3

In the following exercise, you will adjust an incorrect quantity on an approved DWR in the Quantity Correction plug-in for contract CNB022R.

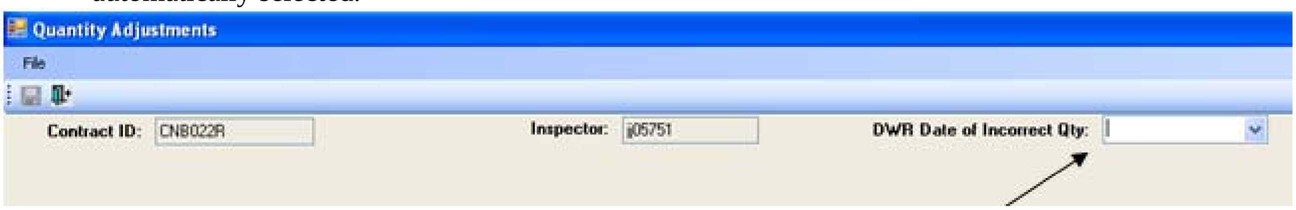
User ID: **jj05751** Group: **INSP** Contract: **CNB022R**

1. On the **Main Panel**, double-click the **Contract Administration** icon.
2. On the **Contract Administration** panel, double-click the **Contract Records** icon.
3. On the **Contract Records** panel, double-click the **Contracts** icon. SiteManager displays the Contracts window.
4. In the **Select Contract** list box, scroll to and double-click **CNB022R**.
5. Click the **Attachments** icon.

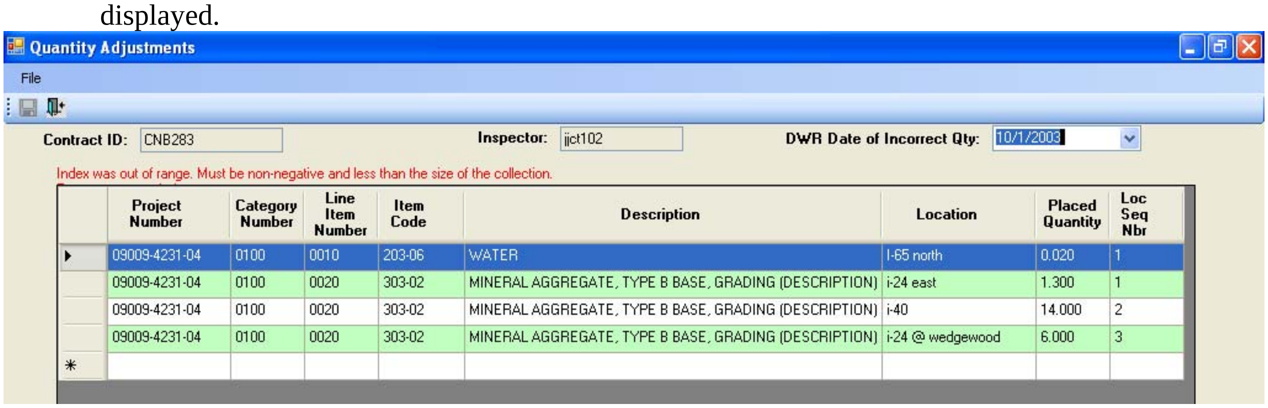
Shift-tab if user ID not highlighted.

The remaining steps cannot be completed in the training environment. The following steps and screen shots demonstrate the process steps.

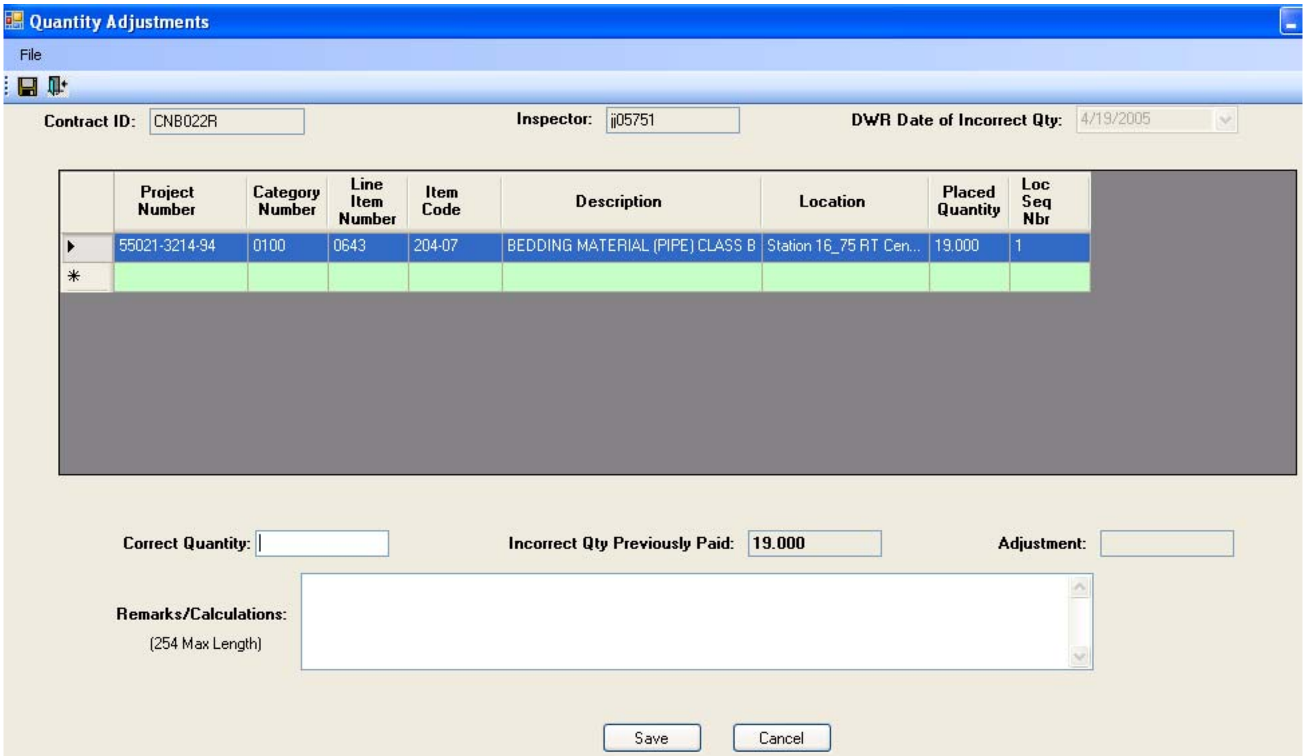
6. Double-click the **Qty Correction** plug-in. SiteManager displays the Quantity Correction plug-in window. The Contract and Inspector are automatically selected.



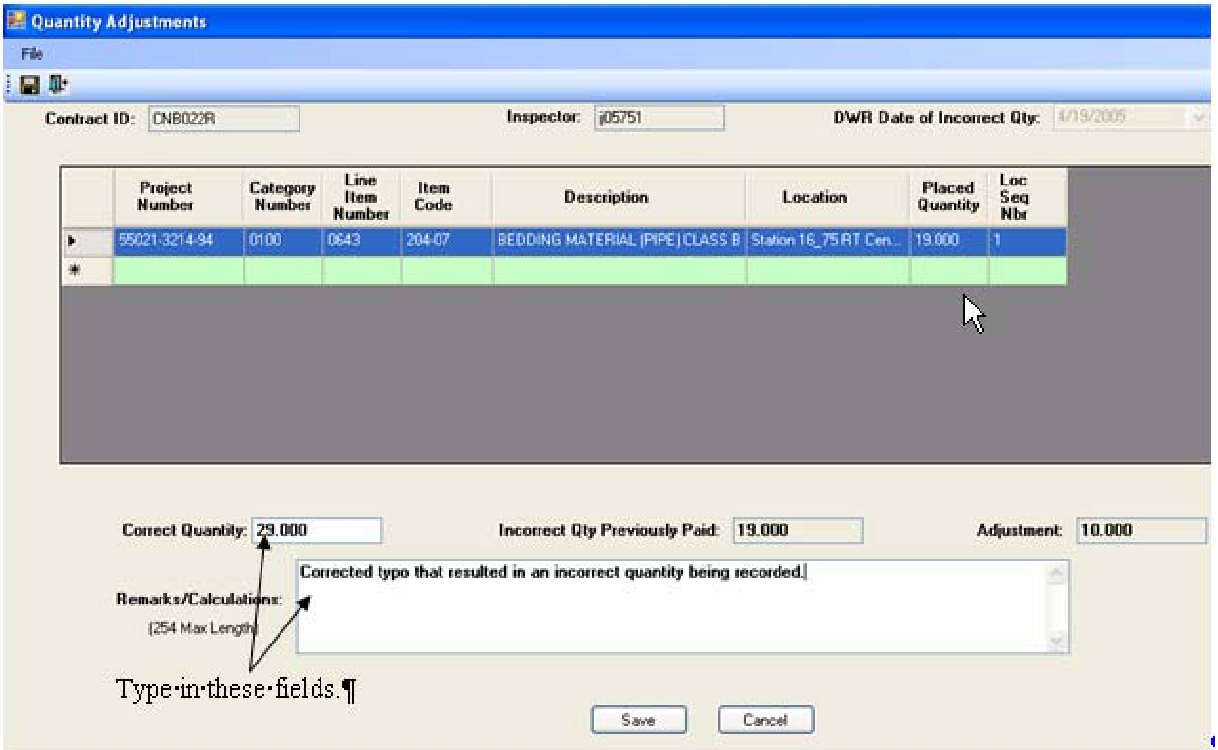
7. In the DWR Date of Incorrect Qty field, select DWR Date 04/19/2005. The work items recorded on the DWR for the selected date are displayed.



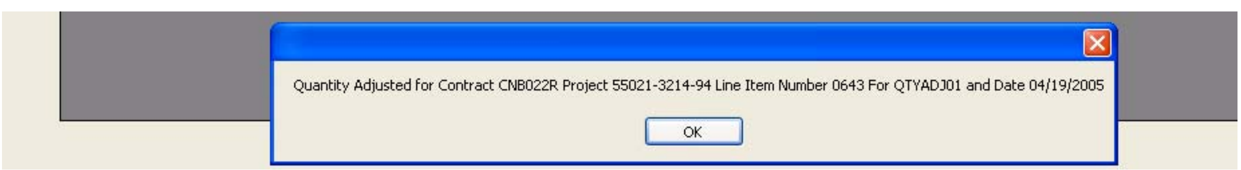
8. Click to select the row for the DWR Item with the incorrect placed quantity: Project Number 55021-3214-94, Category Number 0100, Line Item Number 0643, Item Code 204-07, Description BEDDING MATERIAL (PIPE) CLASS B, Location Station16_75 RT.
   The Quantity Correction program displays an area to make the correction.



9. In the **Correct Quantity** field, type **29.000**.
10. Press the **Tab** key. The Quantity Correction plug-in shows the calculated adjustment in the **Adjustment** field.
11. In the **Remarks/Calculations** field, type **Corrected typo that resulted in an incorrect quantity being recorded**.



12. Click the **Save** button. The Quantity Correction program displays a message to inform you that a quantity has been adjusted for that line item number.

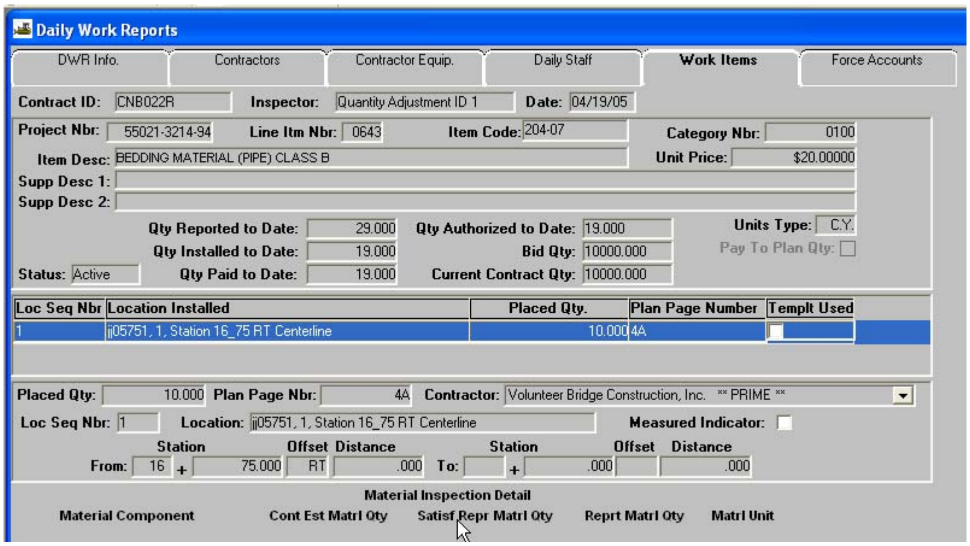


13. In the message, click the **OK** button.
14. On the toolbar, click the **Exit Application** button.

Viewing QTY ADJ DWRs

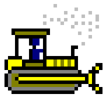
The Quantity Correction plug-in creates QTYADJ DWRs to adjust paid quantities on progress estimates that have already reached final approval. These may be viewed in the DWR window.

The auto created QTY ADJ DWRs are not authorized and will need to be authorized in the Diary window to be included in the next progress estimate.



The Daily Work Reports Window

Figure 9-5



Exercise 9-4

In the following exercise, you will view the DWR resulting from the Qty Correction plug-in.

User ID: **jj05751** Group: **INSP** Contract: **CNB022R**

1. Click the **Close** button to close the Contracts window.
2. Click the **Main Panel** folder tab.
3. On the **Main Panel**, double-click the **Daily Work Reports** icon.
4. On the **Daily Work Reports** panel, double-click the **Daily Work Reports** icon. SiteManager displays the Daily Work Reports window.
5. On the toolbar, click the **Open** button. SiteManager displays the Contract ID window.
6. Click **No** to the save changes message.
7. In the **User ID** list box, scroll to and double-click **QTYADJ01**.
8. In the **Date** area, double-click **04/19/05**. SiteManager displays a message to inform you that the DWR will be opened in a read-only format.
9. In the message, click the **OK** button. SiteManager displays the Daily Work Reports window.

Now, let's view the installed work item.

10. Click the **Work Items** tab.
11. Double-click the row for Project Number **55021-3214-94**, Line Item Number **0643**, Category Number **0100**, Item Code **204-07**, Description **BEDDING MATERIAL (PIPE) CLASS B**.
12. What is the placed quantity? **10.000**
13. Click the **Close** button on the toolbar.

Review for Section 9

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 Checklist Event.
3. In the **Actual Date** field, type the actual date for the Checklist Event.
4. Click the **Save** button.

To view a Key Date:

1. On the **Contract Records** panel, double-click the **Key Dates** icon.
2. In the **Key Date Type** list, select the desired Key Date.

To correct the quantity of an item on a paid estimate with the Quantity Correct Plug In:

1. On the **Contract Records** panel, double-click the **Contracts** icon. The Contracts panel opens.
2. Click the **Open** button. The Select Contract list is displayed.
3. In the **Select Contract** list box, scroll to and double-click the **Contract ID** or perform a **Find**. The Select Contract list closes and the Description folder tab is displayed.
4. Click the **Attachments** button.
5. Double-click the **Qty Correction** plug-in.
6. In the **DWR Date of Incorrect Qty** field, select the DWR Date for the DWR to be corrected. Note: this must be a DWR included on a paid estimate, and must be a DWR you created.
7. Click to select the row for the DWR with the incorrect placed quantity. The Quantity Correction program displays an area to make the correction.
8. In the **Correct Quantity** field, type the correct quantity to report for this item on this day.
9. In the **Remarks/Calculations** field, type the reason for the correction.
10. Click the **Save** button. The Quantity Correction program displays a message to inform you that a quantity has been adjusted for that line item number.
11. In the message, click the **OK** button.
12. On the toolbar, click the **Exit Application** button.

To view the DWR of an item modified with the Quantity Correct Plug In:

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. Select the Contract, Inspector, and Date of the DWR that was corrected.
4. Click the Work Items folder tab.
5. Double-click the Item that was corrected.

Summary Exercise for Section 9

In the following summary exercise, you will perform SiteManager Contract Midlife activities.

User ID: **jj05751** Group: **INSP** Contract: **CNB022F**

1. Navigate to the **Checklist Event Dates** window for Contract **CNB022F**.
2. What is the frequency for the **Storm Water Inspection Report** Event Type? **Quarterly**
3. Record the actual date of the **Storm Water Inspection Report** Event Type. Enter today's date as the **Actual Date** of one occurrence of this event.
4. Navigate to the **Key Dates** window for Contract **CNB022F.**
5. What is the actual date for the **Starting Notice**? **4/15/05**
6. If an error is made on a DWR that needs to be corrected, and the estimate has been generated but not paid, what should be done?
   See page 192, Table 8-3, Estimate Correction Workflow
7. What window is used to run the Quantity Adjustments plug-in to adjust the quantity on a DWR included in a paid estimate? **Contracts, Adjustments Plug-in**
8. Navigate to the Main Panel.

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Section 10 Change Order Basics

for Field Documentation

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

- Understand the rules and life cycle of Change Orders
- View the Item Summary Window
- Track Change Orders
- View the Change Order Report

Change Order General Concepts

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

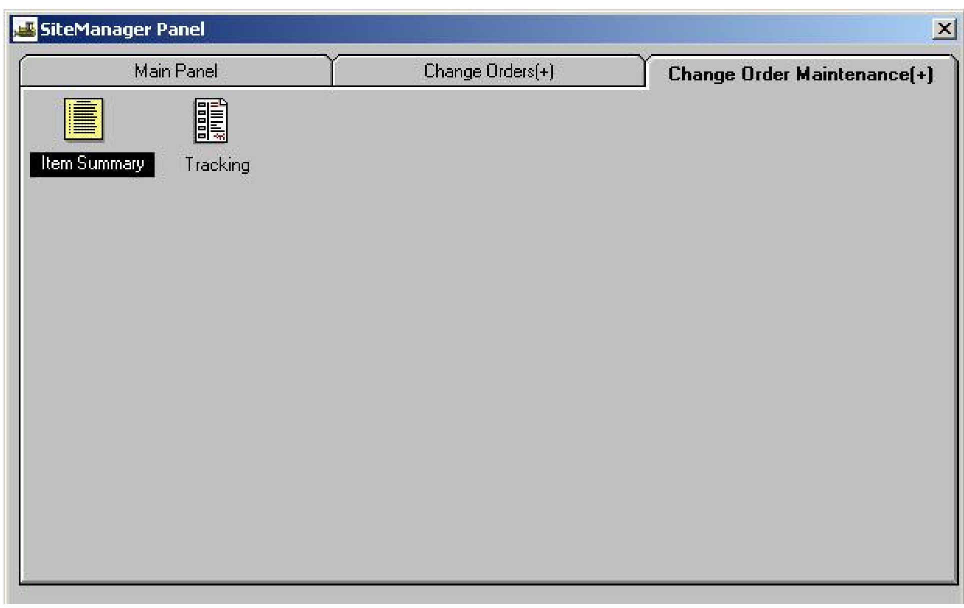
Contract Change Orders may include:

- Quantity adjustments for existing items
- Adding new items of work to the contract
- 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.

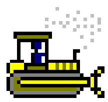
Before the User can select a specific window in the Change Order (CO) function, a specific Contract must be selected from a pick list containing valid Contracts, and associated, existing COs. A specific Contract must be selected from the pick list to create a new change order.

Each CO must be associated with one Contract.



The Change Order Maintenance Panel

Figure 10-1



Exercise 10-1

In the following exercise, you will navigate to the Change Order Maintenance Panel.

User ID: **jj05751** Group: **INSP** Contract: **CNB022I**

1. On the **Main Panel**, double-click the **Change Orders** icon.
2. On the **Change Orders** panel, double-click the **Change Order Maintenance** icon.

Change Order Life Cycle

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

1. **Creation of a New Change Order**

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

2. **Maintaining Change Orders**

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

3. **Review and Approval of Change Orders**

A CO can be kept in Draft and sent for review only or changed to Pending and sent for approval without a review.

After it is created, a draft CO can be forwarded via In-box notification for parallel review. Parallel review is concurrent review by more than one reviewer at a time.

The writer of the CO can also place the change order into Pending status and submit it for a hierarchical approval, skipping the review process.

A CO must be approved to report CO items installed in DWRs.

Users involved in reviewing a draft CO or approving a pending CO can record their decisions about proposed changes to the Contract on-line, using the Review/Approve window. Reviewers/Approvers receive an In-Box message from the author requesting an action, review or approval for the CO. The In-Box message specifies the Contract and change order number.

All COs must be approved or denied before Contract Completion can occur.

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

4. Tracking the Change Order

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

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

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

5. Reports

Once approved, change order data may be analyzed to help manage the change order process. The Change Order Reports function allows users to produce reports that gather information about trends in Contract changes.

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

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

Change Order Conditions

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

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

Change Order Functions

There are six types of change orders:

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

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

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

Overruns or Underruns: Used when the quantities associated with the Contract items are either exceeded or not needed to complete the Contract or work item.

Extra Work: Used when additional work items are required to complete the Contract.

Time Adjustments: Used when the time frames need to be adjusted to reflect the completion period for a milestone or Contract.

Zero Dollar: Used only for contract adjustments that will not affect the dollar amount of the Contract (for example, changing the location of a project).

Force Account: TDOT will not use this function. Force Account COs will require the "Extra Work" function to be selected.

Change Order Status

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

Draft: A change order is Draft status while it is being created, edited, or forwarded for *review*.

Pending: A change order is changed to Pending status when it needs to be submitted for the *approval* process. While in Pending status, the change order cannot be modified except for its status.

Denied: 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.

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.

When the CO is approved it becomes read-only and the items become available on DWRs.

Approved: A change order is automatically placed in Approved status when the last approver completes the *approval* process – it is not a manual selection. When a change order has been approved by its final approval level, it cannot be altered. Adjustments can only be made by creating a new change order.

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

In TDOT, if an approver selects "deny" in the review/approve window, the creator should change the status back to draft, make corrections, and change it to Pending in the Header window to submit 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.

The TDOT Change Order Process

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

Creation of a Change Order

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

Maintaining & Reviewing a Change Order

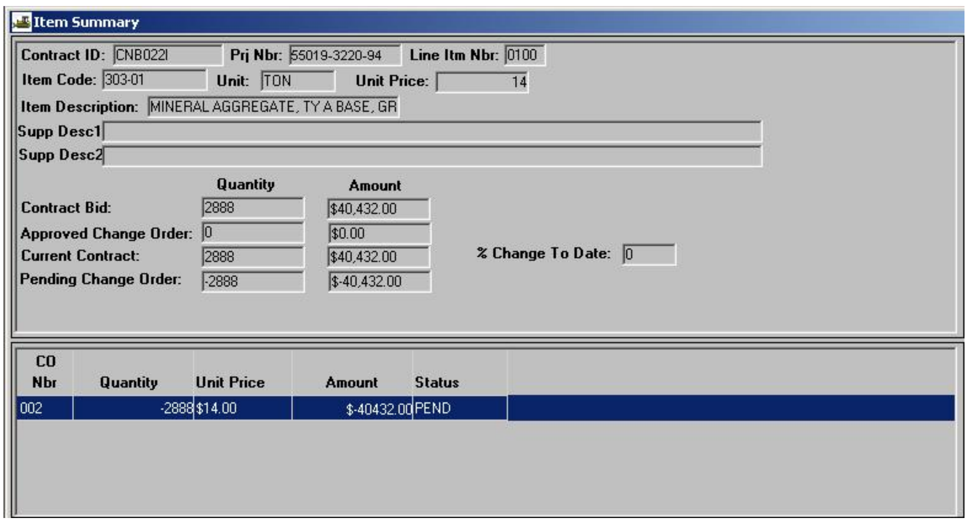
- Forward the change order for parallel review
- Track the change order
- Revise the change order as necessary
- Generate applicable change order reports

Change Order Approval Process

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

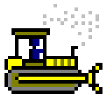
Viewing the Item Summary Window

The Contract Change Order Item Summary window allows users to view the details of an item on a change order, regardless of the status of the change order. The Item Summary window is a display-only window with two data windows. The top data window displays the selected change order item's description as well as bid, current and pending contract item quantities and corresponding amounts. The lower data window displays a list of the change orders associated with the selected change order item, including the quantity, dollar amount and the status of each change order.



The Item Summary Window

Figure 10-2



Exercise 10-2

In the following exercise, you will view the Item Summary window for Contract CNB022I.

User ID: **jj05751** Group: **INSP** Contract: **CNB022I**

1. On the **Change Order Maintenance** panel, double-click the **Item Summary** icon. The **Change Order Items Select** list box appears.
2. Click the **Contract ID** button.
3. In the **Contract ID** list box, select Contract **CNB022I**.
4. In the **Change Order Items** list box, double-click Item Nbr **0100**.
5. What is the adjustment to the item quantity for this change order? **-2888**
6. Has this item been adjusted on any change orders for this contract? **Yes**
7. Click the **Open** button.
8. In the **Change Order Items Select** list box, double-click Item Nbr **9500**.
9. What is the adjustment to the item quantity for this item? **2888**
10. To close the **Item Summary** window, click the **Close** button.

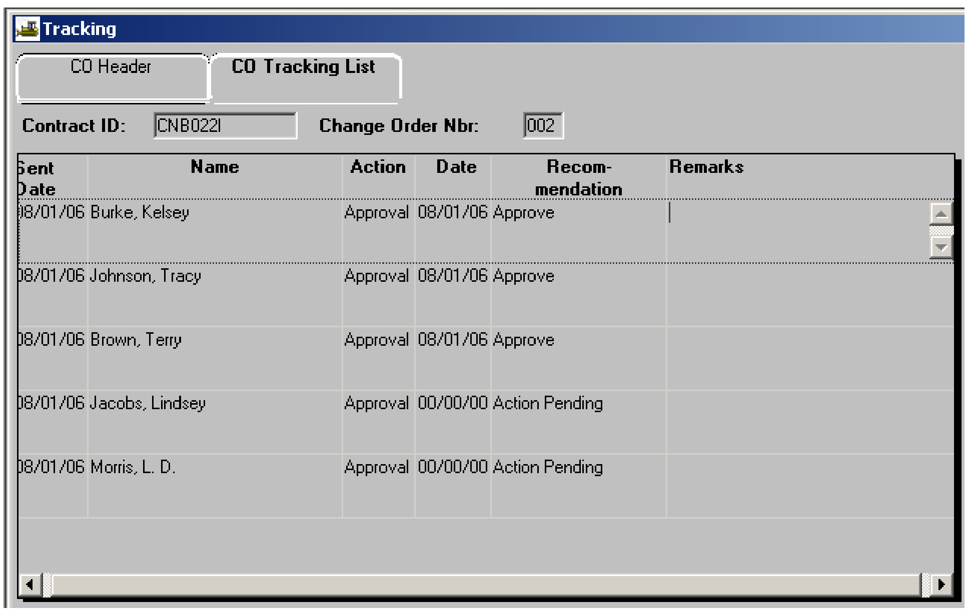
Point out one item is being added to the contract to replace another.

Tracking Change Orders

The status of a Change Order in the review or approval cycle can be monitored by opening the Tracking window at any time. The Tracking window for a CO is a view-only window and displays the following information:

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

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



The Change Order Tracking Window

Figure 10-3

Exercise 10-3

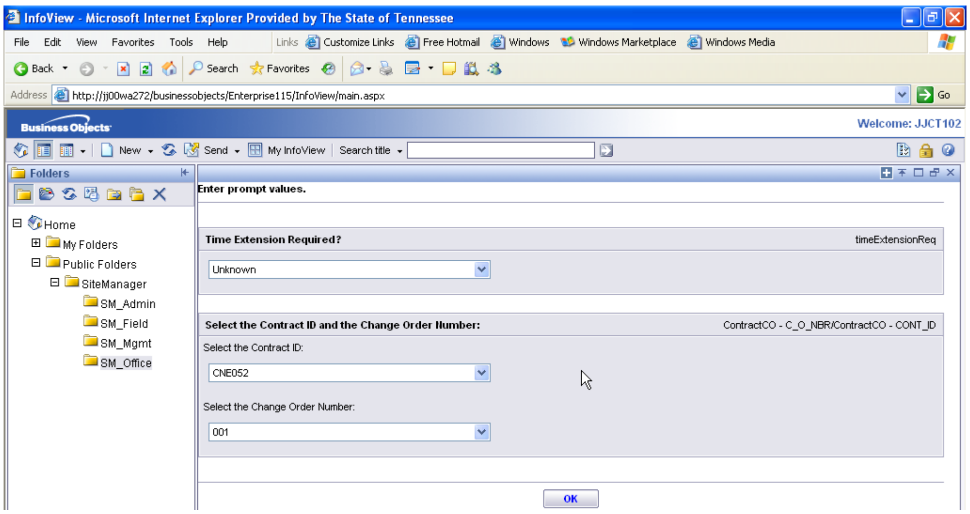
In the following exercise, you will view the tracking window for Change Order 002 for Contract CNB022I.

User ID: **jj05751**   Group: **INSP**   Contract: **CNB022I**

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

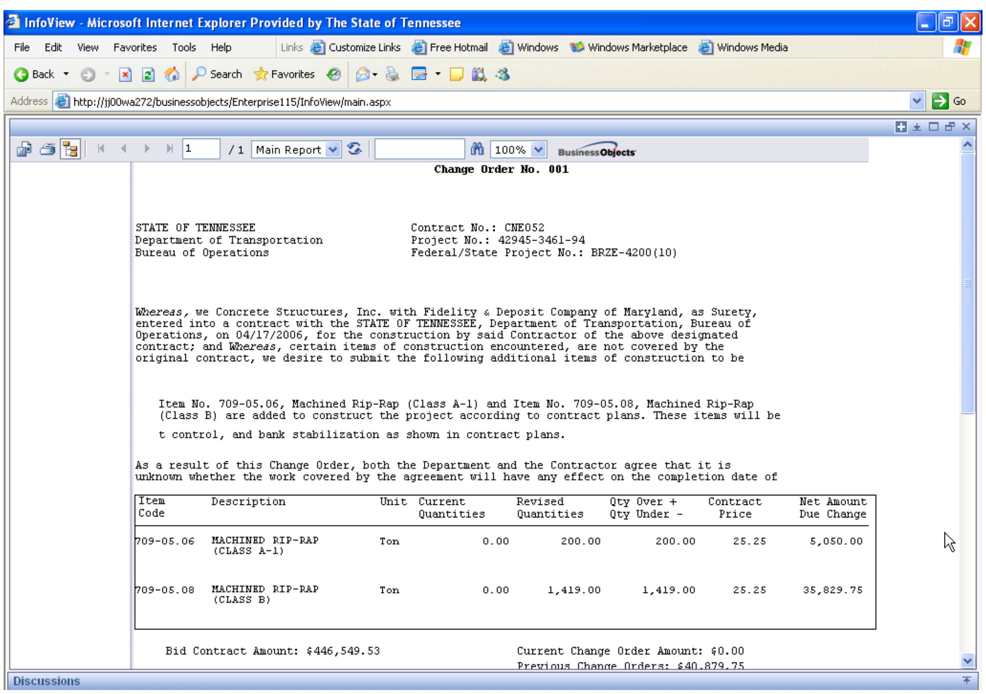
Viewing the Custom Change Order

The custom Change Order is a custom TDOT document.



The Change Order Parameters Window

Figure 10-4



The Change Order Window

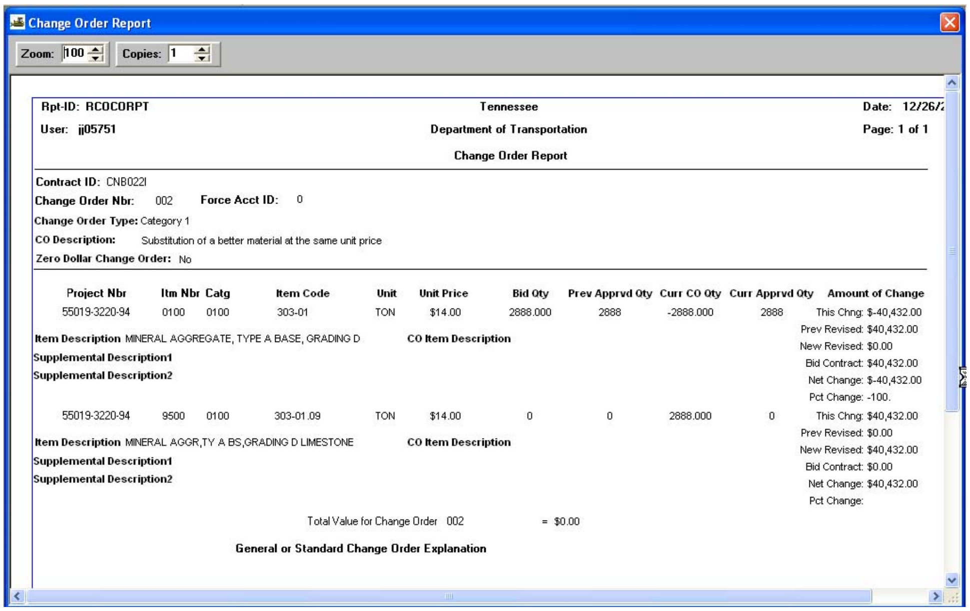
Figure 10-5

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

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

Viewing the Change Order Report

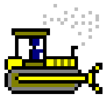
The Change Order Report window can be utilized as a source of information for the review and/or approver of a change order. This is a two-page report window that displays all other date included on a change order. The second page displays only if there are Time Extensions associated with the change order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



The Change Order Report

Figure 10-6

The Standard Change Order Report is available in Standalone mode.



Exercise 10-4

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

User ID: **jj05751** Group: **INSP** Contract: **CNB022I**

1. Click the **Change Orders** folder tab.
2. On the **Change Orders** panel, double-click the **Reports** icon.
3. Double-click the **Change Order Report** icon.
4. Click **OK** to generate the report.
5. What is the description for this change order?
   Substitution of a better material at same unit price
6. What is the Total Value of Change Order 002? **$0.00**
7. To close the **Change Order Report** window, click the **Close** button.

Review for Section 10

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 view the Item Summary window:

1. On the **Main Panel**, double-click the **Change Orders** icon.
2. On the Change Orders panel, double-click the Change Order Maintenance icon.
3. On the Change Order Maintenance panel, double-click the Item Summary icon.
4. Open a Contract to view the change order item summary.
5. When complete, click the **Close** button.

To track the status of a change order:

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

To view the change order report:

1. Click the **Change Orders** folder tab.
2. On the **Change Orders** panel, double-click the **Reports** icon.
3. Double-click the **Change Order Report** icon.
4. Using the right mouse button, click the **Change Order** field.
5. In the **Object** menu, click **Search.**
6. Click **OK** to generate the report.

Summary Exercise for Section 10

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

User ID: **jj05751** Group: **INSP** Contract: **CNB022I**

1. Navigate to the **Change Order Report** window.
2. Generate the **Change Order Report** for Contract **CNB022I**, Change Order **001**.
3. What is the **Change Order Type** for this Change Order? **Category 3**
4. Navigate to the **Tracking** window and view the approvers for Contract **CNB022I**, Change Order **001.**
5. Who is the next approver for this Change Order? **Lindsey Jacobs**
6. Exit SiteManager.

Congratulations! You have completed the course.