

## **Proposed Business Rule for Reporting Weather and Holiday Events Within SiteManager**

### **Current Process:**

Specification requires that a Time Extension be granted on a day for day basis of conditions meeting the requirements for these types of events. This requires the creation of both a Time Extension in SiteManager to document the additional day and creation of a 'weather letter' for granting weather days. Holidays would be done in a similar fashion.

To prevent weather and holidays from negatively affecting our monthly and quarterly reports we have to subtract these days from the total number of days 'used' before we establish the percent increase in time for the contract.

### **Proposed Process:**

Specification and Construction procedures require us to document each day of the contract as being a 'used' day. Currently in SiteManager this is done using the Diary function which defaults to the day being a 'used' (charged) day. A function not currently utilized completely is the ability to indicate that a day is to be a 'non-used' (non-charge) day for a given reason.

We're proposing that two reasons for non-charge day be established, one for 'weather' and one for 'holidays'. Upon proper approval the Project Engineer can indicate that a given day was not to be charged as a used day due to either of these reasons. This would be documented using the Daily Diary Function within SiteManager and if it's to be a used day then no additional effort is required. If to be a non-used day due to one of these events then it would be noted on the 'Charge Tab' as a non-used day for a given reason.

Monthly a report could be produced that would show the number of days that were not charged to the contractor for work because of these reasons. This report could be used as documentation for the 'weather letter'.

For our monthly and quarter reports we would not have to subtract out these days for the days used in order to calculate the actual number of work days used but would just use the 'used' days. We would still be able to show the number of days for weather and holidays.

The decision as to whether the day should be 'charged' (used) or 'non-charged' (unused) can be made at any time during the month but must be made prior to the time the estimate is generated as this is the time when all Daily Diaries and Daily Work Reports are approved and no further changes can be made to them.

If for some reason an error in how a day is charged or not charged occurs, a function is available in SiteManager to correct this error.

### **Advantages:**

Project personnel would save some time in the use of SiteManager in that no Time Extension needs to be documented for the additional days. Remember the day would still have to be documented as either 'charged' (used) or 'non-charged' (unused) but that process is a bi-product of the approval of the Daily Work Reports through the use of the Daily Diary.

Project personnel would not have to enter Change Order Time Extension in SiteManager to add these days to the length of the contract and we wouldn't have to keep track of these Time Extension any longer.

Project Manager would be able to manage the contract actively on a day by day basis and document these types of events as they occur and not after the fact.

We could take advantage of an existing process without any additional requirements.

## Change Orders Header

Required Fields:	
Contract ID:	System(key)
CO Number:	System(key)
Description:	System
Reason Code:	System
CO Type:	System
Functions:	System
Override APP	FDOT
Rules:	

1. **Tentative Verbal Approval Dates:** May be used if it applies. Emergency Change Orders may use these fields.
2. **Status:** Leave Status as Draft until all of the items and explanations are entered correctly.
3. **Description:** A short description of the Change Order.
4. **Reason Code:** Choose reason code from drop down list. Combination is a catch all if multiple reasons apply.
5. **CO Type:** Choose type of change order. The type you pick is determined by the existing rules set forth for all Change Orders.

The screenshot shows a web-based form titled 'Change Orders Header'. The form contains several input fields and checkboxes. At the top, there are fields for 'Contract ID', 'CO Number', and 'Tentative Verbal Approval Dates'. Below these are 'CO Created by', 'Status', 'Approval Level', and 'Description'. There are also 'Reason Code' and 'CO Type' dropdown menus. A 'Functions' section contains several checkboxes. At the bottom, there are 'Emergency Work' and 'Force Account' checkboxes, and a 'Save' button.

6. **Override Approval Rules:** This is to be selected to override the default review/approval rules that had been created for the given type of contract, CO Type and CO Function. See section below on Change Order Rules and Overriding Them.
7. **Functions:** Function must be chosen for the type of items in the Change Order. Every Function that is applicable to the change order must be checked or an error will appear when entering items. Do not use the Force Account check box. If the Force Account box is checked a force account number must be associated to the Change Order. FDOT will not be

using the Force Account section of SM at this time due to the fact that it does not match our specifications. For now if there is a Force Account on the Change Order just treat it as Extra Work. If it is a "no cost" Change Order, SM still needs to have a function picked. Pick the Overrun/Underrun if the Change Order is "no cost".

8. **Emergency Work:** Check if this applies.
9. **Force Account:** Not used at this time.
10. **Reference Doc:** Reference documents may be attached.
11. To save information entered, press the **Save** icon.

## Change Order Time Adjustments

Required Fields:	
Contract ID:	System(key)
Change Order Nbr:	System(key)
Time Adjustment Days:	System

If the Change Order that you are entering included the Function – Time Adjustment, then you will be able to enter the Time Adjustment functions.

Time Adjustments for our Working Day contracts will be adjusted by entering the number of days that contract is to be adjusted because of extra work being added to the contract or adjustment of time for valid reasons as per the contract specifications and FDOT procedures. The number of days should be entered in the field Time Adjustment Days.

Contract ID: 0000 Change Order Nbr: 002

Adjusted Contract or Milestone	Adjustment Days	Adjustment Date	Explanation
00	000000	00/00/00	

Time Adjustment Days: 0 Adjusted Completion Date: 00/00/00

For Milestone: 00  For Contract Completion

Explanation:

Adjusted Completion Date will not be entered and will be calculated based on the Notice to Proceed Date and original number of contract days.

If adjustments are being made for a contract milestone you should check the For Milestone button and also pick from the drop down menu the sequence number of the appropriate Milestone being adjusted.

The Milestone or Contract Completion button should be checked if the adjustment is for the contract overall and not specific to a given Milestone.

The Explanation field can be used to provide information as to the reason and description for this Time Adjustment.

### Saving Change Order

To save the change order and get it on its way in the approval cycle, return to the Header window and change status from draft to pending, then press the Save icon on the toolbar. This will display the Change Order Approval Level window. Then designate the people you want as the approval level. The first two approval levels are Contractor and Change Order Level Approval Level 1. This was done because the actual personnel that have the responsibility for the respective levels is different for different offices.

### Change Order Review/Approve

If you had been requested to review a Change Order for approval then double clicking this icon you will be presented a list of contracts and Change Orders that are awaiting your review. Upon selecting your contract and Change Order, a screen that will allow you to record your actions and comments related to the Change Order. Upon your saving your recommendations and comments a message will be sent either to the user who requested your review or it will be sent to the next person in line for approval to let them know that they require action.

## HANDLING WEATHER DAY AND HOLIDAY TIME SUSPENSIONS

Accounting for weather days and holidays will be done in "real time" by project personnel completing the Daily Work Report and Diary.

The inspector creating the DWR will make the recommendation to suspend time at the time it is completed by entering appropriate remarks.

The Project Administrator will review those remarks and denote concurrence by entering appropriate remarks and showing the diary as a "No Charge" day and selecting the appropriate credit reason.

### INSTRUCTIONS:

Sample DWR info remarks by inspector documenting conditions and recommendation concerning suspension of time.

Project Administrator reviews DWR when creating the diary.

The screenshot displays the 'AASHTO SiteManager' application window. The main title bar reads 'AASHTO SiteManager'. Below the title bar is a menu bar with 'File', 'Edit', 'Services', 'Window', and 'Help'. The main content area is titled 'Daily Work Reports' and contains several tabs: 'DWR Info', 'Contractors', 'Contractor Equip', 'Daily Staff', 'Work Items', and 'Force Accounts'. The 'DWR Info' tab is active, showing the following data:

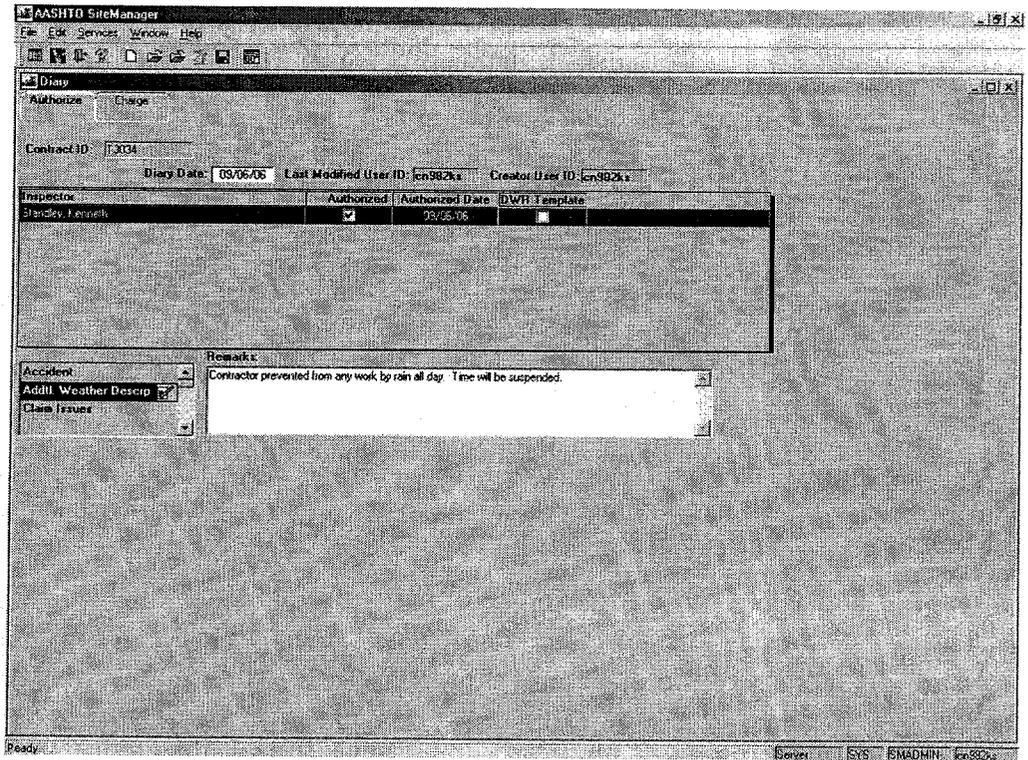
- Contract ID: 1034
- Inspector: Stanley Karsch
- DWR Date: 09/06/06

Below this information are several input fields and checkboxes:

- Locked: No
- Authorized: No
- Authorized Date: 00/00/00
- Temperature: High: 89, Low: 72
- Weather Conditions: A.M. Heavy Rain, P.M. Intermittent Rain
- Work Suspended:
- Suspended Time: 00:00
- Resumed Time: 00:00
- No Work Items Installed:
- No Contractors On Site:
- No Daily Staff On Site:

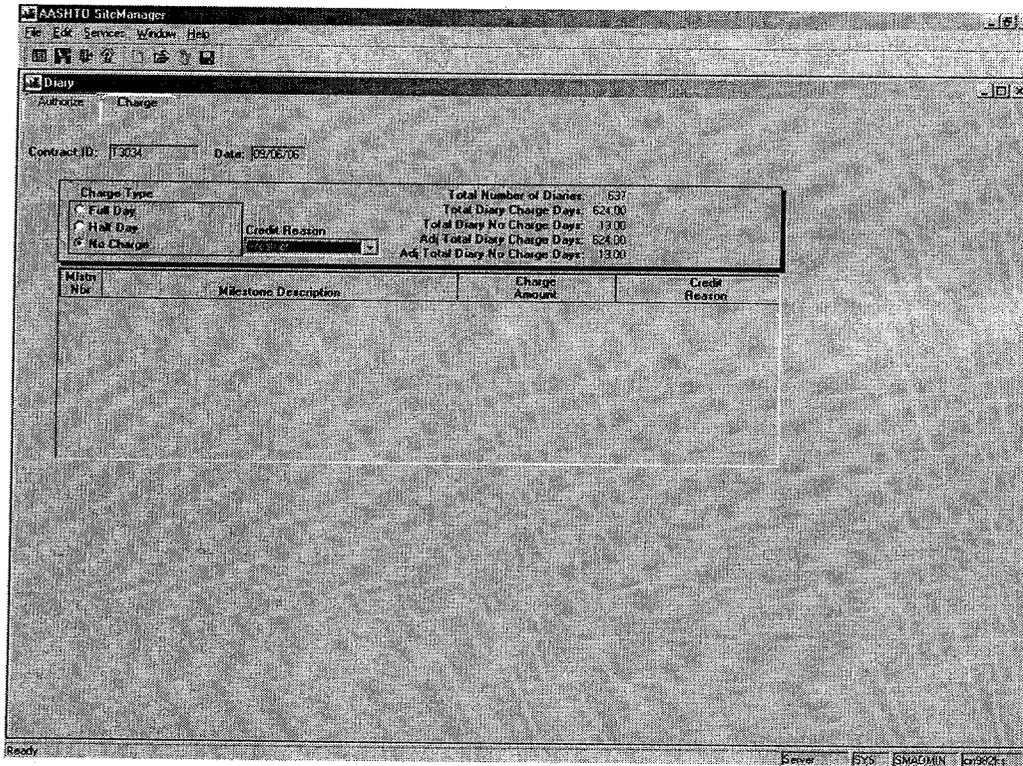
At the bottom, there is a 'Remarks' section with a text area containing the text: "Weather conditions prevented any work on the project. Recommend time suspension for weather conditions." There are also dropdown menus for 'Add Weather Descrip' and 'Add Issues'.

Project Administrator confirms inspector's recommendation with appropriate remarks on the Diary as it is authorized.



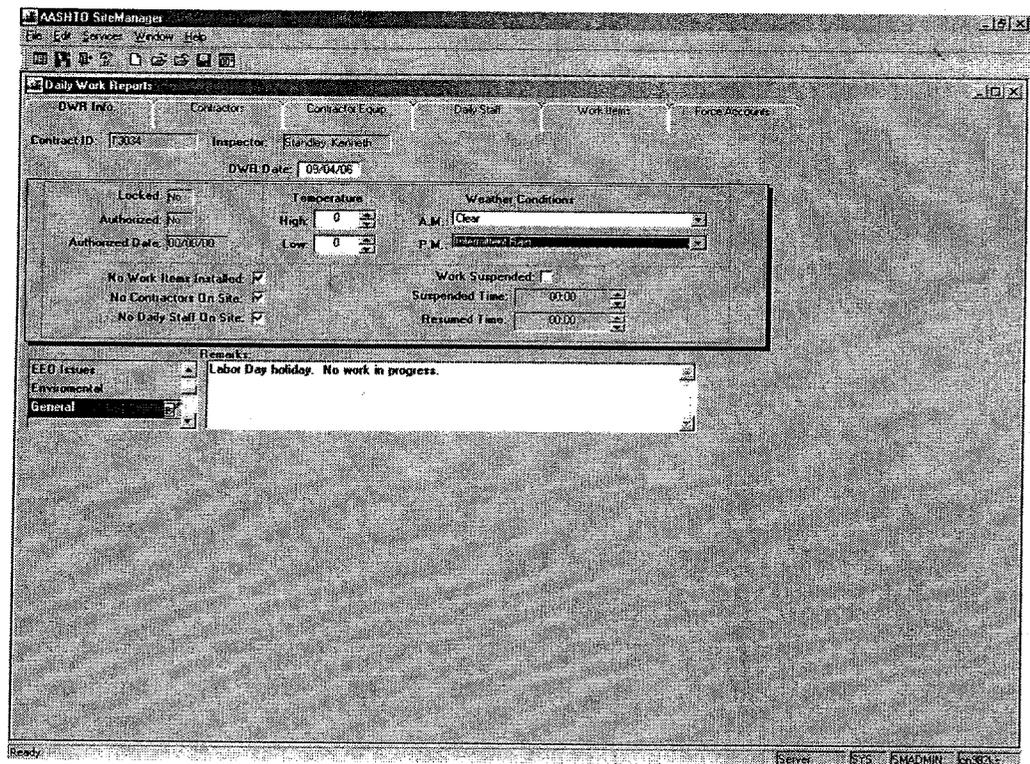
On the Charge tab, select charge type of "No Charge".

Select credit reason of "Weather".

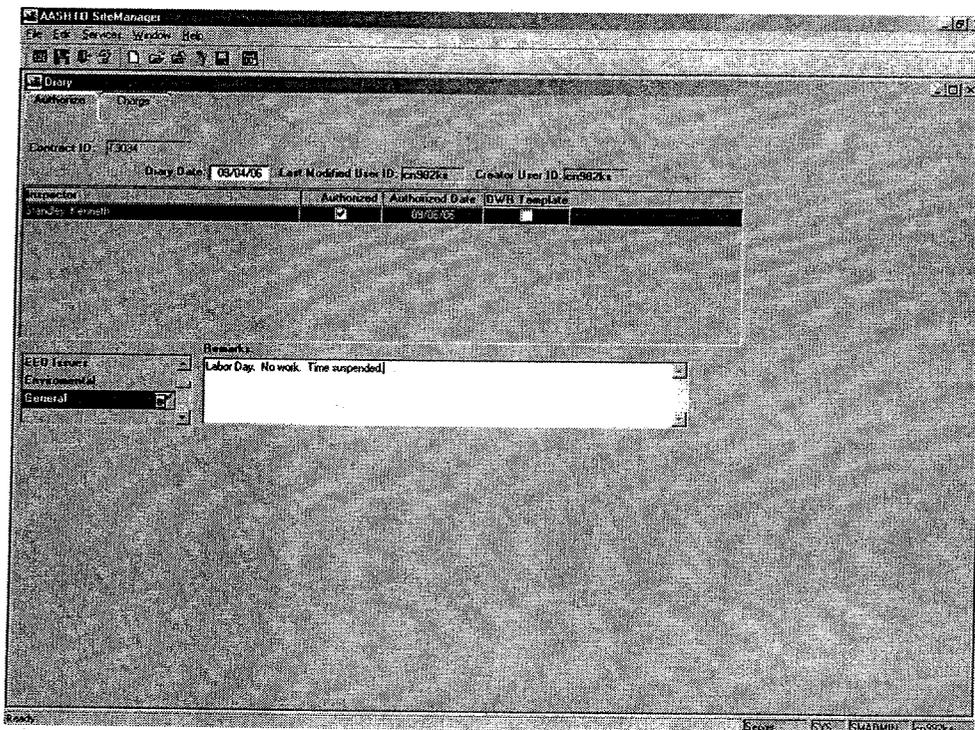


Sample DWR info remarks by inspector documents holiday and recommends suspension of time.

Project Administrator reviews DWR when creating the diary.



Project Administrator confirms inspector's recommendation with appropriate remarks on the Diary as it is authorized.



On the Charge tab, select charge type of "No Charge".

Select credit reason of "Holiday Time Suspension"

**AASHTO SiteManager**  
File Edit Services Window Help

Diary

Contract ID: 1334 Date: 8/04/06

Charge Type:  Full Day  Half Day  No Charge

Credit Reason:  Holiday Time Suspension

Total Number of Diaries: 838  
Total Diary Charge Days: 623.00  
Total Diary No Charge Days: 15.00  
Adj Total Diary Charge Days: 623.00  
Adj Total Diary No Charge Days: 15.00

Milestone Nbr	Milestone Description	Charge Amount	Credit Reason
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Ready Server: JXS SMADMIN 66363

