

Florida Department of Transportation

User's Handbook

Release 3.9B

REVISED

January 2010

Table of Contents

TABLE	OF CONTENTS	2
I.	CONTRACT ACTIVATION FUNCTION	5
CONT	RACT ACTIVATION GETTING STARTED	6
	RIPTION TAB	
	TION TAB	
	CAL DATES TAB	
	ARY PERSONNEL TAB	
	CONTRACTOR TAB	
	stractor Address	
	ne Associates	
	Сомміт Тав	
	IING PLAN TAB	
	ATING THE CONTRACT	
	NG ASSOCIATES TO A VENDOR	
Mana	AGING CONTRACT AUTHORITY	
Gra	nting Contract Authority	
End	ling Contract Authority	
CONT	RACTOR PAYMENT APPROVAL LEVELS	16
II.	SUBCONTRACT MANAGEMENT FUNCTION	
DESCR	RIPTION TAB	
	Тав	
	NG PAY ITEMS TO ANOTHER SUB	
III.	DAILY WORK REPORTS FUNCTION	
Denn	WORK REPORTS GETTING STARTED	
	WORK REPORTS GETTING STARTED	
	INFO. TAB RACTORS TAB	
	RACTORS TAB	
	/ STAFF TAB	
	CITEMS TAB	
	E ACCOUNT TAB (NOT USED BY FDOT AT THIS TIME)	
	REPORTS WHAT YOU SHOULD KNOW	
	TAINING A MASTER LIST	
	ding the Generic List to a Contract	
	or Master List Load Utility	
	dor Master List Load Utility Getting Started	
	On-Line Reports	
IV.	DIARY APPROVAL FUNCTION	
DIARY	APPROVAL GETTING STARTED	
	ORIZE TAB	
CHAR	GE TAB (NOT USED BY FDOT AT THIS TIME)	
V.	ESTIMATES GENERATION FUNCTION	
ESTIM	IATES GENERATION: WHAT YOU SHOULD KNOW	
	IATE GENERATION: GETTING STARTED	
Adjus	STING AN ESTIMATE	
Con	ıtract Level Adjustments	
Line	e Item Adjustments	
	ING AND REVIEWING THE ESTIMATE REPORT	
Delet	FING AN ESTIMATE	

ESTIMAT	r Approval Level Management e Approval Process ion of Printed Estimate For Comptroller	
VI.	CHANGE ORDER MANAGEMENT FUNCTION	63
	Orders, What You Should Know DNS	
CHANGE	T CHANGE ORDERS GETTING STARTED Orders Header	67
Chang	Order Items Folder e Order Item Tab ontract Item Tab	<i>6</i> 8
CHANGE	Order Time Adjustments Order Explanations	69
CHANGE Saving (Order Tracking Change Order	71 71
DELETIN	ORDER REVIEW/APPROVE	
	A PSR Order Example – No Additional Cost Change Order	
VII.	STOCKPILE MATERIALS FUNCTION	
	ed Materials: Getting Started Started	
REPLENIS	HING A STOCKPILE	79
	OUT STOCKPILE MATERIAL BALANCES:	
VIII.	CHECKLIST SCHEDULED EVENTS AND DATES	
IX.	KEY DATES	
	ES: GETTING STARTED DULE A KEY DATE:	
TO ENTER	R THE ACTUAL DATE OF A KEY DATE:	
	те а Кеу Date: те A New Key Date:	
X.	CONTRACTOR EVALUATION	
CONTRAC	TOR EVALUATION GETTING STARTED	
XI.	MASTER LIST MAINTENANCE FUNCTION	
FUNCTIO	ORK REPORTS VENDOR MASTER LIST N 1 – MAINTAINING VENDOR MASTER LIST	
Adding	y Supervisors Personnel Equipment	
Chang	ing an Existing Item.	
	N 2 – MAINTAINING CONTRACT MASTER LIST Ta Resource to the Contract Vendor List	
Adding	all Resources to the Contract Vendor List	
	ing a Resource from the Contract Vendor List ing all Resources from the Contract Vendor List	
XII.	STAND-ALONE FUNCTION	
	SIN SINCE A STREET ST	
GETTING	CONTRACT INFORMATION DOWN TO THE "PROJECT MANAGER'S" WORKSTATION	103

Florida Department of Transportation Trns*port SiteManager Function

User's Manual

Contract Activation

WORKING IN "STAND-ALONE" MODE.	107
MOVING INFORMATION BACK TO THE NETWORK SERVER.	108
GETTING INFORMATION ON WHAT HAS BEEN PIPED TO INSPECTOR'S WORKSTATION	110



Florida Department of Transportation

User's Handbook

I. Contract Activation Function

Release 3.9b

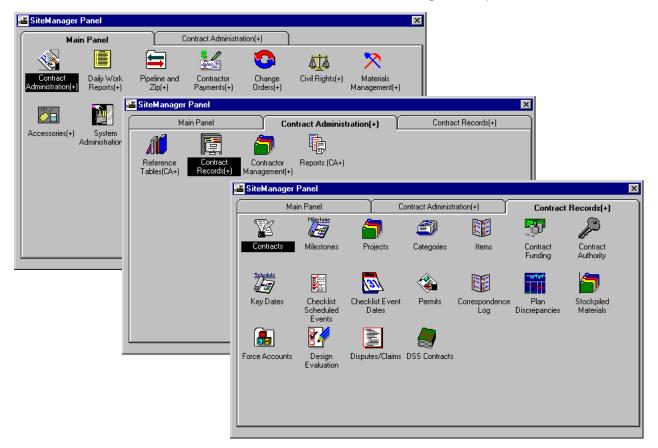
January 2010

Contract Activation Getting Started

Contract Activation must be completed before any work can be reported against a contract.

When contract information is brought over from the pre-construction system (LAS) the contract status will be pending. Status must be changed to "Active" in order to complete Contract Activation.

To start activation, select Contract Administration from the SiteManager Main panel.



Select Contract Records from the Contract Administration panel; then select Contracts from the Contract Records panel.

Once selected, the following screen will appear. If you haven't selected a contract in some other window prior to opening this window, all of the fields will be blank.

If the screen is blank (that is, No keys have been selected), then select File from the Menu – then select Open. Locate the contract you want to work with and then press OK. You could also use the Open icon from the toolbar.

Note: You will only see contracts that you have authority to access.

Contract I				Fed St/Pr Pr			
	as: Pending	<u> </u>			PCN: 409497	5201 • Funding	
Distri ogress Sche	ot:01 💌	Resid-Yard:	2	Field : Variance Pct:		Federal	
	510 B	TIC TRAFFIC STRIPING		valiance Pct.		State/Province Both	
	CALENDAR DA			Bid Days: 450	Bid Amt:	\$780,724.19	
	e: Construction Co				L. L. L.	Fed Oversight	
Work Typ	m: Miscellaneous I	Construction	<u>×</u>		T.	Local Oversight	
				Proposal	Fund Type:		
Spec	Yi: 2000	Unit System: Engl	sh 💌 Supp	Spec Bk Yr: 2004	Alt ID:		
Wage	Decision ID		Wage Decision De	cription		Genri Wg Darn ID	
in:							

Florida Department of Transportation Trns*port SiteManager Function

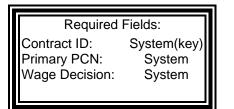
User's Manual

Contract Activation

There are **8** different "tabs" on this window and all of them will be used except the **DBE Commit** and **Training Plan** tabs at the initial implementation of SiteManager in FDOT. The following describes the individual "tabs" and what is required to be entered for "Activation".

These steps can be done in any order but once you have changed status to "Active" in order to save any information you will need to have all data entered that is required for "activation".

Description Tab



If you are ready to activate a contract go to the Description tab and perform the following functions.

1. Verify the **Fed St Project Nbr** is the FA number for your contract (if there is federal funding). If the contract is 100% state funded, then this text box should be populated with N/A.

	ontract escript		Location	Payme	nt Data 🕺 Citica	Dates Prima	ry Personnel 7	Prime Contra	ctor DBE	E Commit	Training Plan
Statur: Active Primary PCN: 6084795200 Image: District: 01 Resid-Yard: Image: Field:: Image: Dense: THEFMOPLASTIC TRAFFIC STRIPING Variance Pet: 00 Image: Field:: Image: Time: Changer: OLE NDAP DAYS Image: Bid Days: 650 Bid Aat: 5780.724.19 Contract: Image: Image: Construction Contract: Image: Image: Fed Oversight Work: Type: Construction Contract: Image: Image: Fed Oversight Spec: Yc 2000 Unit System: English Suppt Spec: Bid At: D:						and the second second				40.00017.022	
District: 01	Ce	entract ID:	E1E45				F	ed St/Pr Prj	Nbr: N/A		
Togress Sched: Variance Pet: 00 Desc: THEFMOPLASTIC TRAFFIC STRIPING Desc: THEFMOPLASTIC TRAFFIC STRIPING Time Charger: CALENDAR DAYS Work Type: Microlineous Contracts Work Type: Microlineous Contraction Versight Versight Spec Ye: 2000 Unit System: English Suppl Spec Bk Ye: 2004 Ak ID: Suppl Spec Versight Spec Ye: 2004 S		Status:	Active	•				Primary	PCN: 40949	1755201	*
mogeni Schedi Unit System: English Suppl Spec Bit Yr; 2004 Ak ID: Wage Decision ID		District:	01 .	1	Resid-Yard:	*	Fie	Id :	-	Fundi	19
Desc: [THEFMOPLASTIC TRAFFIC STRIPING Time Charger: GALENDAR STIC TRAFFIC STRIPING Time Charger: GALENDAR STIC TRAFFIC STRIPING Work Type: [Also Bid Days: 450 Bid Ant: 5700724.1]9 Contact Type: [Also Communic Construction Work Type: [Also Bid Communic Construction Proposal Fund Type: [Spec Yc: 2000 Unit System: English III Suppl Spec Bit Yc: 2004 Alt ID: Wage Decision ID Wage Decision Description Genet Wag Decision Final Structure	Progre	ss Sched:		- 20			Vari	ance Pet	.00	C State/P	ovince
Contract Type: Contraction Contract Work Type: Microfureous Contraction w Fed Oversight Work Type: Microfureous Contraction w Proposal Fund Type: Spec Yr: 2000 Unit System: English Suppl Spec Bk Yr: * Wage Decision Biered Wag Decision Biered Wag Decision		Desc:	THERMOR	PLASTIC TRA	FFIC STRIPING					C Both	
Work Type: Microlaneous Construction w I Local Oversight Proposal Fund Type: Proposal Fund Type:	Time	Charges:	CALENDA	A DAYS			 Bid Da 	91: 450	Bid Amt:	5	780,724.19
Proposal Fund Type: Spec Yc 2000 Unit System: Crastin Suppl Spec Bk-Yc 2001 Ak ID: Wage Decision ID Wage Decision Description Genet Wa Decis ID											
Spec Yr: 2000 Unit System: Inglinh 💌 Suppl Spec Bk Yr: 2004 Ak ID:	~	/ork Type:	Miscelland	sous Construct	ion	1	•			C Local 0	versight
Wage Decision ID Wage Decision Description Genel Wg Dosn ID					12			a state of the second s	10000000000000		
		Spec Yr:	2000	Unil	System: English	- Sup	opl Spec Bk '	Ye 2004	Alt ID:	I	_
	ge	Wage De	cision ID	V.	Wa	ge Decision D	escription			Genel Wg E	can ID
	ision:										
	10										
											1

2. Leave the **Status** as "Pending" for right now. We will change this after we have entered all the information required to activate the contract.

Helpful Hint:

If you change the status to Active at this point, you can press the **Save** icon and the system will tell you if you have entered all of the information required and that it has been entered correctly for activation. If you want to save data that you have entered to this point but you don't have all of the data entered for activation then change status back to pending and press **Save**. This will save the data to this point and contract as pending and you can come back later on and complete the activation process.

- **3.** If the lead Financial Project ID is not shown in the field labeled **Primary PCN** then select it from the drop-down list.
- 4. Make sure the **Time Charges** is set to "Available Working Days"
- 5. Wage Decision is not going be used initially by FDOT but SiteManager requires that a valid decision be entered. We have set up a default value to enter. To enter the wage decision do the following:
 - Place focus on the lower portion of the window by clicking the mouse in that area.
 - Select the **New** icon.
 - Search in the first test box (Wage Decision ID) by clicking the right mouse button and selecting Search from the menu. Select the appropriate wage decision.
- 6. Do not edit any other editable fields.
- 7. Press the **Save** icon on the toolbar.

Florida Department of Transportation Trns*port SiteManager Function Location Tab

User's Manual

Contract Activation

1. Check for the proper Contract County.

- 2. To add a new **Contract County**, place the focus in the lower portion of window by clicking the mouse in the area. Then press the **New** icon to insert a blank row. Use the search lens to select the desired county to add by clicking the right mouse button.
- 3. Make sure that at least one county has been checked as the **Primary County**.
- 4. Make sure a Location has been entered.
- 5. Press the Save icon on the toolbar

Payment Data Tab

Required Fields	3:
Contract ID:	System(key)
Liquidated Dam Rate Amt:	FDOT
Auto Liquidated Dam:	FDOT
Trgr Pct:	FDOT
Retain Stkpiled Ind:	FDOT
Unlimited Escrow:	FDOT

2. The Contract Limit Pct. is the allowable amount that we can overrun the existing funding sources when we add a contract change. This percent should be set to at least 100% to ensure that no additional funding sources will have to be added during the contract life. It can be higher or lower than this. This has nothing to do with our state statute that only allows for 5% overrun before a Supplemental Agreement must be done using the Change Order function.

antract ID: E1E45 Location: On the Road g Sta Nb: Beg Termini: 000000.000 Route Nbr: d Sta Nb: End Termini: 000000.000 Highway Nbr:	scription	Location	Payment Data	Critical Dates	Primary Personnel	Prime Contractor	DBE Commit	Training Plan
Beg Ste Nbr: Beg Terminic 000000 000 Houte Nbr: Highway Nbr: Highway Nbr: Town: Spaces Town: Spaces Town: Primary County Highway Type: Spaces Town: Town: Spaces Town: Spaces Town: Spaces Town: Spaces Town: Space Town:	Cerchpion	COCUMAN	r aymerir crana	Cincaroani	T IIII AY T GIVEN IN	TIME CONTROLS	DOL COMM	
Beg Ste Nbr: Beg Terminic 000000 000 Houte Nbr: Highway Nbr: Highway Nbr: Town: Spaces Town: Spaces Town: Primary County Highway Type: Spaces Town: Town: Spaces Town: Spaces Town: Spaces Town: Spaces Town: Space Town:								
Cind Sta Mile: End Terminic (000000000) Highway Mar: Ioad System: Space: Ioad System: Town: Ioad System: Space: Highway Type: Space: Ioad System: Primary County Highway Type: Primary County Ioad System: Ioad System:	Location:	On the Road						8
Cind Sta Mile: End Terminic (000000000) Highway Mar: Ioad System: Space: Ioad System: Town: Ioad System: Space: Highway Type: Space: Ioad System: Primary County Highway Type: Primary County Ioad System: Ioad System:	Reg Sta Nbc			Reg Termini	000000.000	Boute NE	er.	- 11
Ioad System: Space: Highway Type: Space: Tom: Tom: HARDEE: STATEWIDE WANATEE MANATEE	End Sta Nbr:							- 77
Contract County Primary County HARDEE If STATEWIDE If HighLANDS If MANATEE If	Road System:	Spaces				0001		-
FARDEE F STATEWICE F FIGHANDS F MANATEE F		Town:						
FARDEE F STATEWICE F FIGHANDS F MANATEE F					1.601			
STATEWIDE IV RIGHLANDS IT		l.	Contro	ct County				
FIGHLANDS T		and the second second						
MANATEE						R		
						—		
		MANATEE				No. And American		
		OKEECHOBEE						
						_		

1. Leave the Contract Limit Amt. blank.

Cenception Location Peyment Data Difical Date: Primary Personnel Prime Contracts DEE Contract Training Plan Contract DI: ETEC5 Contract Limit Am: 5:00 Lispidated Dam Rate Am: 3780/224.15 enerate Ext2 Day: Contract Limit Pet: 0:00 RETAINAGE Price Adjunct Ind Securities Allowed Retain Stipaled Ind Vorth Cengl Data Effect Date Pot Pot Base Mar Pot Mar Amt Lump Amt Training Plan	ontracts			A Part of Control of C				the second
Generale Exit Day: Contract Linit Ant: \$00 Liquidated Dam Rate Ant: \$100 Generale Exit Day: Contract Linit Ant: \$00 Auto Liquidated Dam Bet Auto Liqui		Payment Data	Critical Dates	Primary Personnel	Prime Contractor	DBE Comm	it Training Pla	n
Generate Ett2 Day: Contract Limit Pote 00 File Adjunct Linuid Added Dam RETAINAGE Price Adjunct Ind Securities Allowed File Etain Stiguled Ind Retainage Changes: Work Compil Basis Effect Date Pot Pot Base Max Pot Max Ant Lump Ant Trg: Pot Trg: Base	Contract ID: E1E45		1		Current Contract	Ant:	\$780,724.19	T
RETAINAGE Price Adjunct Ind Securities Allowed Retain Stikpled Ind Volamited Excrow Max Excrow Ant \$100 Retainage Changes: Work Compl Basis Effect Date Pct Base Max Pot Max Ant Lump Ant Trip Pct Trip Base	Generate Est1 Day:	Contract Limit Ami	t l	\$.00 L	iquidated Dam Rate	Amt	\$1[00	2
Image: Change: Image: Change: Work Compiliasis Effect Date Pct Date	Generate Est2 Day:	Contract Limit Pe	t					8
Securities Allowed Retain Stikpled Ind Retainage Changes: Work Compl Basis Effect Date Pct Pct Base Max Pct Max Amt Lump Ant Trgr Pct Trgr Base			RETAINA	.GF		T Price	e Adjant Ind	
Work Compl Basis Effect Date Pct Pct Base Max Pct Max Amt Lump Amt Trgr Pct Trgr Base	Securities Allowed	Retain Stkpiled In			Max Escrow	Ant	\$.00	
Work Compl Basis Effect Date Pct Pct Base Max Pct Max Amt Lump Amt Trgr Pct Trgr Base								1
			-					
OFFICIN PLACE II 102/25/04 OQ CUPRENT AND OQ E.OQ E.OQ OQ CUPRENT AND						Trgr Pc		
					\$.00	.00 .0	CURRENT A	
					\$ 00	1.00 <u>.</u> 01	CURRENTA	
					\$ CQ	1.00 <u>.</u> 0	CURRENT A	
					\$ (7)	E 00 . O		
					\$ 00]	too o		
					\$101	tod .o		
					\$10	too <u>(</u> .o		
					\$10	too <u></u> .o	(CURRENT A	

- 3. The Liquidated Damage Rate Amt. is by default set to \$1.00. You will need to check the contract and determine the correct LD amount to be entered into this field.
- 3.4. If you entered an amount in the Liquidated Dam Rate Amt. field then you will need to check this box if you want SM to apply LD's to your estimate. If you do not want SM to apply LDs, then do not check this box.
- 4.5. If fuel adjustments are to be paid to the contractor then the Price Adjmnt Ind check box must be checked. In most cases this will be checked. You will need to check your contract to make sure the contracts meets the requirements for the adjustments.
- 5.6. Make sure the Unlimited Escrow and Retain Stkpiled Ind under Retainage are checked.
- 6-7. The Retainage portion of the tab at the bottom should not require any changes to it.
- 7.8. Press the **Save** icon on the toolbar.

Critical Dates Tab

Required Field	ds:
Contract ID:	System(key)
Letting Date:	System
Award Date:	System
Execution Date:	System
Notice to Proceed Date:	System

The **Critical Dates Tab** contains most of the important dates that will need to be kept during the life of the contract. Some of these dates are calculated automatically by SiteManager and will not have to be entered by any user. Three dates should already be populated by the system upon the contract entering SiteManager. They

Description Location P		Critical Primary Dates Personnel	Prime DBE Co Contractor	ommit [×] Training Plan
Contract ID: 30002				
Critical Date Description	Actual Date	Required to Activate	Required to Finalize	▲
etting Date	04/27/94			
ward Date	06/01/94			
igned Date	00/00/00	N	N	
xecution Date	09/04/94	Y	N	_
lotice to Proceed Date	00/00/00	N	N	
rice Adjustments Base Date	00/00/00	N	N	
hecked Out to Field Date	00/00/00	N	N	
Vork Begin Date	00/00/00	N	N	~

are Letting Date, Award Date and Execution Date.

One date is required to "activate" a contract. This date is the **Execution Date**.

If the Execution Date did not transfer, you can enter a date for the **Execution Date** now. The **Notice to Proceed Date** can be entered at a later date.

To enter the **Execution Date** do the following:

- Select **Execution Date** on the top portion of the window.
- On the lower portion, enter the Actual Occurrence Date.
- If you wish to inform a group of users (**Distribution List**) or a single user (**Recipient ID**) defined to SiteManager you can select those by using the search lens on each field.
- If you select a group of users or a single user then you can enter the text of the message that you wish to send at the time of saving this information.

Press the Save icon on the toolbar.

	AASHTO SiteManager
	File Edit Services Window Help
NOTE: See Attachment "A" a	t 🗍 🖾 🚰 🖄 🖬 📮 🖾 🐃 🖢 🖉 🔤 🖗
end of this section for a list o	
the Critical dates along with a	Contract ID: [E1245 Project Manager:
description and the Office	Project Engineer: N Contract Designer:
responsible for the entering of	Df Contract Created By:
the dates.	User ID: Distribution List:
	Work Progress Behind Schedule User ID: Distribution List:
	Civil Rights Exception Report Generated:
Primary Personnel Tab	User ID: Distribution List:
Required Fields:	
Contract ID: System(key) Project System	
Manager: Project System Engineer:	
	When the contract is transferred from LAS to SiteManager the Project

Florida Department of Transportation Trns*port SiteManager Function

User's Manual

Manager and **Project Engineer** will be blank. Before you can save the contract even as **pending** you will need to designate the Project Manager and Project Engineer that will be responsible for managing this contract.

To enter the **User ID** for these, you can either type the **User ID** in the field or use the search lens. While on the field, click the right button on the mouse and select **Search** from the menu. A list of users will be displayed. Select the appropriate user(s) from the list that is displayed. This list will show all users of SiteManager. If you display this list you should sort the list on **User ID** to get all construction users together for your district. To sort on the User ID just click your mouse on the User ID heading and the list will sort in ascending order. Locate the user you're looking for and press **OK**.

If you wish to send a message to a single user or a group of users when contract moves from "Pending" to "Active" then in the lower portion of the window enter a User ID or Distribution List. Again either typing the known value in the field or using the search lens while on the field can do these. The user(s) will be notified when contract status is changed.

Leave the other fields blank.

Press the Save icon on the toolbar. This will save the contract to pending.

Prime Contractor Tab

Required Fields	S:
Contract ID: Max Subcontract Pct:	System FDOT
Subcontractors Paid:	FDOT
Prime Associates:	System

The awarded contractor vendor number should be showing in the **Current Prime** field and contractor name should be next to that. No changes should be made to this field.

Make sure **Payroll Required** checkbox is blank.

Make sure Subcontractors Paid checkbox is checked.

Description	Location	Payment Data	Critical Dates	Primary Personnel	Prime Contractor	DBE Commit	Training Plan
Contract II							
	n: NF59298205600	A AMERISEAL N	IOR THEAST FLOR	IDA, INC.		☐ Joint \	Venture
Payroll Requir	red Freg in \	Veeks: 0	Max 5	ubcontract Pct	50.00	Subcontracto	orn Paid
Bankruptcy D			J ype Desc: Spac		10000	S	
- Defaulted			The name labor				
Indicate	ANY INCOMENTATION OF THE REAL PROPERTY OF THE PROPERTY OF THE REAL PROPE	paces			Date: 00/00	2/00	
Original Pri	me Contractor: 🗌						
ime Contacts:	Co	nlact Name		Con	act Type		Jser Id
¹	(2011) - C. (1997)						
				ciate Short Name		Associal	e Type
ime Associates:		CAPITOL INDE	MNITY CORPORA			Surety	1812
ime Associates:	239-0971527		INSURANCE CON			Insurance	

Two things are may required to be done on this screen before we can activate the contract. The first is to include the **Contractor Address** and the second is to associate a "Surety" and "Insurance" **Associate Type** to the prime contractor. This information should have transferred into SM when the Contract was transferred from LAS to SM.

Contractor Address

To add a contractor address, do the following:

- 1. Make sure focus is on the upper portion of the window.
- 2. Select Services, and then Address from the pull down menu or press the Address icon on the toolbar.
- 3. Highlight the Vendor Home Address selection.
- 4. Press the Address icon on the toolbar to hide the address window.

To add the "Surety" and "Insurance" **Associate Type** do the following:

- 1. Place focus on the **Prime Associates** portion of the window.
- 2. Press the New icon on the toolbar.
- 3. In the Associate Vendor ID column use the search lens to locate the "surety" Associate Type from the Prime Contractor Associate tab.
- 4. Select the appropriate firm from the list shown. Make sure Associate Type is "surety".
- 5. Press OK.
- 6. Repeat the above steps but select "insurance" as the Associate Type.

Note:

If the "Surety" and "Insurance" company is the same company, first select the vendor "Insurance and Surety are the same company" and show the **"Associate Type"** as "insurance" then select the vendor "Surety and Insurance are the same company" and show the **"Associate Type"** as "surety".

Press the **Save** icon on the toolbar.

Note:

If no associates appear on the Prime Contractors **Associate** tab then you will have to follow the instructions below labeled **Adding Associates to a Vendor**.

DBE Commit Tab

This tab will not be used by FDOT initially. Changes in the DBE rules and how they will be reported using SiteManager is still being reviewed at this time. If the contractor is designated as a DBE in the DOT Vendor file; however; the system requires us to set the DBE work type on the DBE tab before the contract can be activated.

Training Plan Tab

This tab will not be used by FDOT at this time.

Activating the Contract

If you have entered all required data, you can go back to the **Description** tab and change the **Status** to **Active**. Press the **Save** icon on the toolbar to save the changes. If all required data has been entered correctly you will get the message shown on the right.

Press the **OK** button to continue.

SiteMana	ager 🔀
٩	Contract is Successfully Activated
	OK

Florida Department of Transportation Trns*port SiteManager Function

User's Manual

Contract Activation

Adding Associates to a Vendor

Required Fields: Vendor ID: System(key)

 Using the SiteManager Panel icon on toolbar to go to the SiteManager Main Panel and double click on the Contract Administration icon to go to the Contract Administration Panel.

 Double click the Reference Table (CA+) icon.
 Double click the Vendors icon. The Vendors Description tab will be

displayed.

遥 SiteManager Panel Main Panel Contract Administration(+) Reference Tables(CA+) h ЛÏ Contract Contractor Records(+) Management(+) Reports (CA+) Process List Reference Tables(CA+) 基 SiteManager Panel × Main Panel Contract Administration(+) Reference Tables(CA+) 邗 1214 -70 Factory ß Ē Interface Load Administrative Offices Item Master Funding Sources Vendors Default Critical Default Key Messages Dates Dates 31 Default Checklist Default Events Liquidated Damages

Select Open from the File menu or press the Open icon on the toolbar to display a list of FDOT vendors.

Locate your contractor within the list of vendors. Upon highlighting it press OK.

Verify that your contractor is being displayed.

Now go to the **Associates** tab.

On this tab we will associate both the "surety" and "insurance" type associate to our Prime Contractor. If you know the Prime Contractor's Surety and Insurance company by name then you have the option of locating that vendor within the vendor file or you can use the default "surety" and "insurance" that has been supplied with the vendor file.

On the Associates tab, do the following to add the "surety" and "insurance" to the contractor you have selected.

Required	Fields:
Vendor ID:	System(k
Surety:	ey)
	FDOT
Insurance:	FDOT

Vendor ID: VS59	036366001 Short Name:	AMERICAN EAGLE	Accounts	Urage	
	Associate Short Name	Аззосія	ite Type		
			-		

- 1. Make sure focus has been set on the lower portion of the screen.
- 2. Press the **New** icon on the toolbar to add a blank row.

Contract Activation

- 3. On the field Associate Short Name use the search lens to locate the appropriate "surety" company for this contractor.
- 4. After highlighting the "surety" vendor press OK.
- 5. Under the **Associate Type**, use the drop down menu to highlight "surety" as the appropriate type.
- 6. Repeat steps 2 through 5 but this time make the Associate Type "insurance".
- 7. Press the **Save** icon on the toolbar.
- 8. Close the Vendors tab and return to the Contract Prime Contractor tab. You can do this by using the Windows command on the menu and select this tab from the list of windows.

If the **Prime Contractor** tab is not available to you then either check, under the Windows menu option for the Contracts window and click on it or follow the navigation for the Contract Activation to return to the Contracts window. You should then be able to follow the instructions under Prime Associates above to add "surety" and "insurance" to this contract for the Prime Contractor.

Managing Contract Authority

If you are the Project Manager or Project Administrator for this contract then you will need to add additional users to Contract Security so that they will be able to access this contract to enter Daily Work Reports and Diaries. This security along with the group that the users belong to will give them the necessary authority they need to process contract information during the life of the contract.

Contract security is now viewed from the user perspective instead of the contract. In previous versions of SiteManager you would identify the contract and then add the persons you wanted to grant contract authority. Under the latest version of SiteManager, you will now identify the person and then add the contracts that you want that person to have authority on.

To give someone else contract authority, do the following.

- 1. From the Main panel double click on the Contract Administration icon.
- 2. Double click on the Contract Records icon to bring up the Contract Records panel.



3. Double click on the Contract Authority Icon.

Florida Department of Transportation Trns*port SiteManager Function

User's Manual

4. The screen below will be displayed. This displays a list of all SiteManager users in the top portion of the screen, User Identification. As you highlight a user in the top, the lower portion displays the contract authority that has been granted to that user in the lower portion of the screen, Contract Authority Assignment. The following fields are displayed:

🚢 Contract Aut	hority	1								-
User Identificati										
User ID			User Name		CO	1)0 R	0	FLD	
cn706jj	Jolliff, Joyce				No	07				
KNAIMDR	Rampt, Doroth	าบ			No	07	714			
ad218ck	Knight, Rocky	•			No	02				
ad218rh	Hancock, Rot	bert			No	02				
ad218sm	Mott, Stephan	ie, Transferred			No	02				
ad303jr	Rodgers, Jam	es M.			No	03				
bu218lg	Green, Linda				No	02				
cn106aj	Jordan, Amy				No	01				
cn106bm	Monkelbaan, I	Brian			No	01				Ţ
Contract Author	ity Accianment	•								_
Group De		Office-wide	Contract Id	Contract	Descriptio		Autho	ritv	Authority	
01000 00	acription	Access	Contractio	Contract	beaenpad		Start D		End Dt	
SiteManager Inquir	y Group									
SiteManager Inquir	y Group		E4G53	SR-A-1-A from Hutch	ninson Hous	e W. to	Marti <mark>5/4/2004 1</mark>	3:42:4		
SiteManager Inquir	y Group		T1036	SR 45 (US 41)			12/16/200	3 10:07		
SiteManager Inquir	y Group		T1039	SR 78 (PINE ISLAND I	RD)		12/16/200	3 11:04		
SiteManager Inquir	y Group		T1033	SR 659 (COMBEE RD)		1/15/2004	11:18:		
SiteManager Inquir	y Group		T1050	SR 62			7/20/2004	16:32:		
SiteManager Inquir	v Group		17019	SR 93A (I-75)			12/11/200	3 10:09	12/29/2003 08	:09

a. User Identification - Top Portion of Screen

Userid – SiteManager assigned user identification

User Name - Full name of user for given Userid

- CO Indicates whether user is assigned to the Central Office
- DO Indicates the District in which the user is assigned
- RO Indicates the Resident Office in which the user is assigned
- FLD Indicates the Field Office in which the user is assigned
- b. Contract Authority Assignment Lower Portion of Screen

Group Description – User groups in which the user has been assigned

Office-Wide Access – Indicates if user has been granted Global Contract Access for that group

Contract ID - Indicates the contract for which user is being granted contract authority

Contract Description – Short description of contract work as shown on the Contracts Record

Authority Start Date – Indicates for specific contracts the date and time when contract authority began.

Authority End Dt – Indicates for specific contracts the date and time when contract authority was ended.

Granting Contract Authority

- 1. To give contract authority, locate and highlight the user in the top portion of the screen for whom you wish to grant contract authority. This will display information about current contract authority that the user has in the lower portion of the screen.
- 2. Place focus in the lower portion of the screen and click on the Add button (looks like a sheet of paper). The following screen will be displayed.

New Contract Group Authority			×
Group Description	Contract Id	Contract Description	Authority Start Date
_			
<u>S</u> ave	<u>C</u> ancel		

- **3.** In the area labeled **Group Description**, use the drop-down to display all groups that the user belongs to. Click on the appropriate group under which the user will be performing their work for the authority being granted.
- 4. To grant specific contract authority, either enter the contract ID or use the search lens by clicking your right mouse button while in the **Contract ID** field. A list of contracts will be displayed, locate the contract you are granting authority for. Upon identifying the contract id, the Contract Description will be shown.
- 5. Click on the **Save** button to save the record. You will be returned to the previous screen where the new record will be added and the **Authority Start Date** will be included. You can click on **Cancel** to ignore this change.
- 6. Ending Contract Authority: To end contract authority from an individual who has already been granted authority at some other time just highlight the name in the User Identification (upper) portion of the window. Highlight the record(s) (hold the shift key down to highlight multiple records) that you wish to end authority for in the lower portion of the window and choose **Services** then **End Contract Authority** or press **Ctrl+Shift+E**.
- 7. Granting Contract Authority: To grant authority to an individual who at one time had authority but it had been ended at some point, just highlight the name in the User Identification (upper) portion of the window and press the new button (looks like a sheet of paper) on the toolbar. Follow steps 2 5 described in the text above.

Ending Contract Authority

Highlight the contract and group for which you want to end contract authority in the Contract Authority Assignment (lower) portion of the window and choose **Services** then **End Contract Authority** or press **Ctrl+Shift+E**. You can select multiple contracts to end authority on by holding the shift key down while clicking on the desired records. Each of these methods will add the date and time into the **Authority End Dt** field in the lower portion of the screen.

Note:

When you **End** someone's contract authority they do not disappear from the list. The **End Date** is populated with the date that the authority ended. This is done in order that we might have an audit trail of all individuals who has ever had **Contract Authority**.

Contractor Payment Approval Levels

Required Fields: Contract ID: System(key)

To ensure that proper individuals have the ability to generate estimates it is necessary to review the **Contractor Payment Approval Levels** under the Contractor Payments icon on the SiteManager Main Menu and from there using the Reference Tables icon for Contractor Payment Approval Levels.

Contractor Payment approval Levels have now been separated into the 3 different groups. There is now a unique approval level for Progress Estimates, Final Estimates and Supplemental Estimates. Each of these different estimate types will need to have their appropriate Contractor Payment Approval Level established.

There are default values that have been set and will be established for each contract. However, because our payment approvals are done differently in each District they will need to be set specifically for each of your contracts. You can define up to 5 approval levels for each contract. The following show some possible assignments for Progress Estimates (**Note:** position titles and descriptions may differ from district to district):

- Level 1 Person charged with generating the estimate, Resident Office, Office Engineer or Project Engineer.
- **Level 2** Initial Approval Project Engineer
- **Level 3** Resident Office Approval Resident Engineer
- Level 4 District Office Approval District Office, Office Engineer
- Level 5 Electronic Estimate Approval EED

Each level of approval will be given to a specific group. An individual must belong to that group in order for that individual to either generate the estimate or perform any approval of the estimate. Since this approval can be customized for each contract, you can designate any individual to perform any level of approval by including the group in which that individual belongs as long as they have contract authority for the specific contract.

See Estimate Generation Function on how to set up Contractor Payment Approval Levels.

Florida Department of Transportation Trns*port SiteManager Function

Attachment "A" Critical Dates

Data Type CRITDATE	CODE ID	Code Description	Definition Not used By FDOT
CRITDATE	ADJC	Accepted Date Adjusted Completion Date	Used only on Calendar Day Contracts
CRITDATE	ARCH	Contract Archived Date	Date contract was Archive
CRITDATE	AWRD	Award Date	Date contract was Awarded
CRITDATE	BKDT	Contractor Bankruptcy Date	Date Automatically populated by system
CRITDATE	CKDO	Checked Out to Field Date	Not used by FDOT (initialy for SitePad)
CRITDATE	DELT	Contractor Default Date	Date Automatically populated by system
CRITDATE	EXEC	Execution Date	Date the Contract was executed
CRITDATE	FMEX	Assigned to FieldManager Date	Not used by FDOT
CRITDATE	FREL	Contractor Final Release Date	Not used by FDOT
CRITDATE	LETD	Letting Date	Date the Contract was let
CRITDATE	NTPD	Notice to Proceed Date	The date the Contractor can begin work
CRITDATE	OPTF	Open to Traffic Date	Not used By FDOT
CRITDATE	ORGC	Original Completion Date	Used only on Calendar Day Contracts
CRITDATE	PAJB	Price Adjustments Base Date	Date at which any item price adjustment is based (normally same as letting date)
CRITDATE	SIGN	Signed Date	Not used by FDOT
CRITDATE	SWKC	Substantial Work Complete Date	Not used by FDOT
CRITDATE	WKBG	Work Begin Date	Contractor begins physical work on Contract
CRITDATE	WKCM	Physical Work Complete Date	Not used by FDOT

This page was left blank intentionally

•



Florida Department of Transportation

User's Handbook

II. Subcontract Management Function

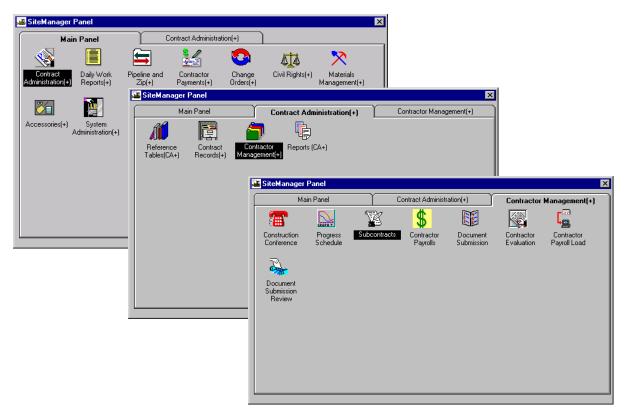
Release 3.9b

January

Subcontract Management Getting Started

So, you want to create a Subcontract? Here's a quick reference on what steps to take.

Select **Contract Administration** from the **SiteManager Main** panel to display it and then select **Contractor Management** from the **Contract Administration** panel. From the **Contractor Management** panel double click on the **Subcontracts icon**, to display the **Subcontract Description** folder tab.



Description Tab

Required	Fields:
Contract ID:	System(key)
SubCont Nbr:	System
Subcontractor:	System
SubCont Type:	System
Work Type:	FDOT

Remember if the Contract ID is blank or it is not the one that you wish to work with, from the **Services** menu select **Choose Keys** to locate the appropriate contract.

SubCont Nbr: Use up to four digits as the subcontract number such as S100, S200, etc. this will put the subcontracts in logical order when looking at a list of the

AASHTO SiteManager	
le <u>E</u> dit <u>S</u> ervices <u>W</u> indow <u>H</u> elp	
III 🙀 🗣 😤 🗅 📽 🏂 🖬 🖓 📟	
Subcontracts	
Description Items Contract ID : 20002	
SubCont Nbr: S001 Parent Subcont Nbr: Supp/Hauler Ind	
Subcontractor: CONCRETE PAVERS, INC. Contract DBE Goal Pct: 00	
SubCont Type: User Defined DBE Type: Only DBE Verified Payment Amt	
Work Type: Hot Plant-Mixed Bitumin 💌 Cert Type: Last: .00 Total: .00	
Approval Date: 08/01/94 Pct Twrds DBE Goal: 100.00 Fed Supp/Haul Fund Pct: 00	
Amounts Pct of Total Sub'd Pct of Total Contract	
This SubContract: 1,950.00 100 4.82	
This Original Commitment :	
This Current Commitment: 1,950.00 100 4.82	_
Total Original Commitment: .00 .00	
Total Current Commitment: 1,950.00 4.82	
Total Allowable Max (non-spcity): 19,806.05 49.00	
Total Towards Max (non-spcity): 1,950.00 4.82	
Total Spcity Subcontracted: .00 .00	
Total Subcontracted: 1,950.00 4.82	

subcontracts because of the method SM uses to sort numeric values. This number must be unique for this contract.

- 1. **Parent Subcont Nbr:** SiteManager allows for adding subcontracts to existing subcontracts. There is no limit to the levels of subcontracting within SiteManager. If this subcontract is a subcontract to another subcontract then enter the two digits **SubCont Nbr** for that subcontract.
- 2. **Supp/Hauler Ind:** If this subcontract is for a Supplier or Hauler then check this flag.
- 3. Subcontractor: Subcontractor is picked from the vendor list by using the search lens while on the Subcontractor field. The same sub may be listed on more than one subcontract. Select the subcontractor using the vendor number on the sublet form. If the subcontractor does not appear on the list then it must be added to the Vendor list.

DO NOT ATTEMPT TO ADD A VENDOR TO THE VENDOR LIST YOURSELF.

Forward a request to your District SiteManager coordinator to have this done. All vendors must enter SiteManager from the preconstruction system (LAS). Once the vendor has been added to LAS it will transfer to SiteManager overnight.

- **3.4. SubCont Type:** Pick the one that most closely fits. This is only a description field and does not affect how the subcontract is calculated.
- 4.5. DBE Type: Choose Spaces as the DBE type. This field affects the way the subcontract is calculated and for now, DBE's will not be tracked within FDOT using SiteManager initially.
- 5.6. Work Type: Use what matches the subcontractor the closest. Sometimes work type for contractors is not populated with real "work types" that are associated with each contractor and this causes SiteManager to produce warning statements saying that the subcontractor is not associated with the specified work type. If you receive this warning, select OK. A subcontract can still be entered after these warnings are bypassed.
- 6.7. Verified Payment Amt.: At this time there is no need to put an entry in this field.
- 7.8. Approval Date: Enter the date when this subcontract was given approval by appropriate individual. This can be entered at a later date either by you or by the appropriate individual. You will not be able to show work against the sub until the Approval Date has been entered.
- 8.9. This Original Commitment: Leave blank, this may be used later if we track DBE's within SiteManager.
- 9.10. Save the information entered. If you receive the error "Subcontractor's uncompleted work amount exceeds the sum of work class qualification amount" appears, select **OK**.
- 10.11. If your contract is Design-Build or Lump Sum you may have more to do on this screen, if you choose to create your subcontract without referencing the pay item you will need to enter an amount directly into the This SubContract field. In order to access this field you will need to check the Supp/Hauler Ind box. When you do this the This SubContract field will become white and you can enter the total amount of the subcontract. Save when you are done and this will complete this subcontract.

NOTE: When this method is followed, you will be unable to access the **Items tab**.

🚘 AASHTO SiteManager

Items Tab

Required F	ields:
Contract ID:	System(ke
Subcontract Nbr:	y)
Prj Nbr:	System(ke
	y)
	System
Line Item:	System
Quantity:	System
Unit:	System
Price \$:	System

If no blank line appears in the upper portion of the window then with focus on this portion of the window click on the New icon from the toolbar.

Once you have added a blank row in the upper

portion, entry of the data will be done usin	g the	
blanks in the lower portion of the window.	For the following,	Be sure to place the focus in the lower
portion of the window.	-	-

- 1. Pri Nbr: This is the Financial Project ID for which this subcontract will be applied to. Select the Financial Project ID from the drop down list.
- 2. Line Item: This will identify the proper Pay Item number that is to be included in this subcontract. While on the Line Item field use the search lens and locate the appropriate Pay Item number from the list. After selecting the appropriate Line Item from the list, press OK to return to the Items tab.
- This Subcontract, Quantity: Enter the quantity of the item that is subcontracted unless an item is 3. included on more than one subcontract. If it is, SiteManager requires you to calculate the quantity of the item based on the percentage of the unit price for which the subcontractor will be reimbursed. Only adjust the quantity of the item, leave the unit price the same as the original contract amount.

NOTE: If your contract is a Design-Build or Lump Sum, you should not use the item tab to enter the item and unit price. Follow instruction 11 associated with the **Description Tab** directions above.

- 3.4. This Subcontract, Unit: The correct unit should already be displayed for the line item. If not, select from the drop down list. See NOTE above.
- 4.5. This Subcontract, Price \$: Enter the price per unit for the item. This may have to be adjusted from what it actually is if you encounter a situation as described in 3 above.
- 5.6. Save the information entered.
- 6.7. Repeat Steps 1 6 of the Items Tab section for any additional items associated to this subcontract. Focus in the upper portion of the window and select the new icon. Remember to save each additional item.

Subcontracts						
Description	ltems	Contract ID) : 20002	Sul	ocontract Nbr :	S001
Project Number	Line Item	Item Code	Units Type	Specialty		Short Descript
97930-3301 0	0400	0331 2	TON	N	ASPH CONC TYPE	S
ا						
∢ Prj Nbr: 97930-33	301	Line Item: 040	D Supl Desc			
	301	Line Item: 0400 Quantity	Supl Desc Unit		Price \$	Amount \$
			Unit		Price \$	Amount \$ 2,600.00
Prj Nbr: 97930-33	t Bid:	Quantity	Unit TON			
Prj Nbr: 97930-33	t Bid:	Quantity 26.000	Unit TON TON		100.00000	2,600.00

If additional subcontracts are desired, return to the **Description** folder tab and select the new icon.

Adding Pay Items to another SUB

If you have already added some pay items to a Subcontractor and that Subcontractor is not able to perform the work, you have two options in SM. SM will not allow you to add a new first tier Subcontractor with the same pay items that have already been shown against another Subcontractor.

- 1. If you have not already paid on an item to a Subcontractor, you can delete the pay item from the initial Subcontractor and then assign it to a new Subcontractor that you created in the above instructions.
- 2. If a partial payment has been made on an item, then the other way would be to add a second tier Subcontractor to the parent Subcontractor that the pay item is attached to and add the pay item with the remaining quantity to the second tier Subcontractor at the same or a new unit price.

NOTE: At no time do you need to change the Units of Measurement for a pay item just to get the pay item associated with another Subcontractor.

This page left blank intentionally.



Florida Department of Transportation

User's Handbook

III. Daily Work Reports Function

Release 3.9b

January 2010

Daily Work Reports Getting Started

This function has replaced our need for the Daily Inspection Reports we previously used. However, there may be certain contracts that are not in SM and will need to be tracked by the use of the Daily Report of Construction form <u>700-010-13</u> in the forms library. Currently the form is in PDF, HTML or Word format. The Inspector can download the Word format form to their laptop and fill the report out in the field. This DWR is essentially a paper form and will need to be input into the current EDMS system.

From the **SiteManager Main** panel double click the **Daily Work reports** icon and then double click the **Daily Work Reports** to display the daily work report (DWR) window.

꾧 SiteManager Panel		X
Main Panel	Contract Administration(+)	
Contract Administration(+)	Contractor Change Payments(+) Orders(+)	Civil Rights(+) Materials Management(+)
	SiteManager Panel	
DWR Info. Tab	Process List Reference Tables(DWF	
		AASHTOSitzManager Ele Ede Services Window Help
Required Field	ds:	IIII 🚰 🕸 党 D. 😂 😂 🔜 🔤 🕎
Contract ID: DWR Date: Inspector ID: High Temperature: Low Temperature: A.M. Weather Conditions: P.M. Weather Conditions: Remarks in General:	System(key) System System(key) FDOT FDOT FDOT FDOT FDOT	Device Reports Contractors Contractors Dely Stall Work Items Force Accounts Centract ID: E1E45 Inspector: Evrett: Kathy DWTI Inde: 00/10 Jate: 00/01 Jate: Weather Conditions Authorized Date: 00/00/000 High: 75 Stall Weather Conditions Authorized Date: 00/00/000 High: 75 Stall P.M.: No Work Items Installed: F Work Suppended: Suppended: No Unstacture to Rese: Suppended Time: 00:00 Stall No Dady Stall On Stal: F Resumed Time: 00:00 Stall
If the Contract ID is blank th Services - Choose Keys to To open a contract that has r	pick your contract.	ect

To open a contract that has DWR's on it, you can use the open folder icon on the tool bar at the top to pick your contract.

Enter the date of the DWR in the **DWR Date** field. You can either type the date or you can select by using the built-in calendar functions by double clicking within the **DWR Date** field. Press the tab or enter key to move

Services – Choose Keys to pick your contract.

off the **DWR Date** field. If this is not your first DWR for this contract, then you will be asked to copy Contractor Information. Respond with **OK** and this will copy the previous day's information on the **Contractor** tab and **Contractor Equip** tab.

Tab to the **Temperature** fields and type in the temperature or use the arrows to pick the **high** and **low** temperature for the day.

Tab to the **Weather Conditions** and select a short descriptive phrase from the drop down list about the weather conditions.

In the **Remarks** area include any necessary comments under any of the standard remarks labels to the left. Just highlight the appropriate remark type and type your comment in the Remark field. Once you move off of the remark type then a check mark will be displayed to indicate that you included comments.

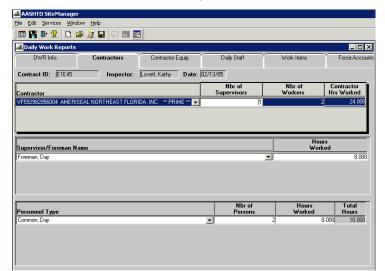
Save the information by using either the File – Save command or the Save icon on the toolbar.

Helpful Hints:

The check-boxes labeled "No Work Items Installed", "No Contractors On Site", and "No Daily Staff On Site" appear as though they need to be checked by the user when recording information on the DWR Info. tab. Actually they are automatically checked based on information entered on the other DWR tabs and the user **should not** make changes to these check boxes. You can preview the DWR by clicking on the icon labeled **Preview DWR** located on the toolbar at the top of the screen.

Contractors Tab

Required Fi	elds:
Contractor ID: Inspector: Date: Contractor: Supervisor/Foreman	System(key) System(key) System(key) System FDOT
Name: Hours Worked:	FDOT
Personnel Type:	FDOT
Nbr of Persons: Hours Worked:	FDOT FDOT



- 1. Focus in the upper portion of the window and select the **New** icon. **Add** the Prime Contractor for this contract from the drop down list. Occasionally the arrow, which indicates a drop down list, does not appear when selecting a contractor. If this happens, click in the field for contractors and the drop down list will appear.
- 2. <u>DO NOT</u> try to populate the fields **Nbr. of Supervisors**, **Nbr. of Workers** and **Contractor Hrs. Worked** located in the "Contractor" portion of the window. These fields are automatically populated from the entries made in the **Supervisor/Foreman Name** and **Personnel Type** portions of the window.
- 3. A generic Master List of Equipment, Personnel, and Supervisor is available to be used for each contract. The Master List is not job specific as one might think; instead it is user specific. See section Maintaining a Master List below for managing the Master List.
- 4. The list of personnel for the "prime" contractor or any subcontractor can be specified either by type as we currently do on our Daily Inspection Reports or it can be specific to a given individual. If you prefer to use type then the use the generic list. You will record the number of this type of personnel and the hours that

each work. You may have some that work half day and some a full day. Make sure you select the type that represents the type position they hold as well as if they worked a partial or full day.

- 5. A contractor must be selected and shown here if items are to be entered on the **Work Items** tab. SM will not let items be chosen when no contractor has been included on this tab.
- 6. Add any subcontractors to this list who are working on the project for the day of this DWR. Follow the procedure in Step 1 of this section.

NOTE: When you add Superintendent and Foreman, you only need to bring them into one group, either the Supervisor group or the Personnel group. A problem arises when they are shown on both groups. Sometimes SM will double the reported Superintendent or Foreman quantity.

Contractors Equip. Tab

	🕌 AASHTO SiteManager
	Elle Edit Services Window Help
lds:	🛛 🎟 📲 🗣 🔶 🗅 🗀 🕸 🐷 💭 🔤
System(ke y) System(ke y)	Daily Work Reports Down Reports D
System(ke y) EDOT	Equipment ID - Description Pieces Used Used
FDOT FDOT FDOT FDOT	gen - 07 Backhoe <u>1</u> 11 4.000
	y) System(ke y) System(ke y) FDOT FDOT FDOT

Click on the **Contractors Equipment** tab, Recording of Equipment will be done in a similar fashion as with personnel. You can record hours by specific piece of equipment by entering an **Equipment ID** or you can report hours to a generic piece of equipment. The number of pieces of equipment that are being used should be reported as well as the number of pieces that are idle. This will give us the actual number of pieces of equipment that contractor has on sight and the number of hours used.

If a certain piece of equipment does not exist, you must modify the master list to add this equipment prior to selecting it. See below for how to manage the **Master List**.

Daily Staff Tab

DO NOT use the Daily Staff folder tab at this time. Employee's time and mileage reporting will still be recorded as it is now. However, SiteManager may be utilized in the future for recording this information.

Daily Work Reports	Contractors	Contra	ctor Equip.	Daily Staff	Work	ltems	Force	_ C Accounts
Contract ID: E1E45	Inspector:	Lovett, Kat	hy Date: 00	2/14/05	ļ			
Staff Member		S/C	Work Code	Reg. Hours	OT Hours	Vehicle ID	Starting Mileage	Ending Mileage
Alan Bryant - P.E.		▼ S		8.000	.000			13,550
Allen Forget		▼ S		5.000	3.000	0040	1,200	1,240
Alvin Starling		▼ C		4.000	.000	0045	80,000	80,062
Chris Kilpatrick		- C		8.000	2.000	0060	43,233	43,262

Work Items Tab

Require	d Fields:
Contract ID:	System(key)
Inspector:	System(key)
Date:	System(key)
Placed Qty:	System
Contractor:	System
Location:	System

Remember **Work Items** cannot be entered if there has not been a contractor chosen for the day.

The list displayed here is the contract pay items that were included in the

Daily Wor	k Penorts					
DW/P	K Reports					_ 0
Dwith	nfo.	Contracto	rs ČCo	ntractor Equip. Daily Staff Worl	k Items Force Acc	ounts
Contract ID	E1E45	Insp	ector: Lovett,	Kathy Date: 02/14/05		
Project Number	Line Item Number	Category Number	Item Code	Description	Supplemental InstldDescription 1	-
40949755201	0005	0300	010214	TRAFFIC CONTROL OFFICER		
40949755201	0010	0300	0711 3	PAVT MESSAGES THERMOPLASTIC		-
40949755201	0015	0300	0711 4	DIRECTIONAL ARROWS THERMOPLASTIC		
40949755201	0020	0300	0711 5 1	GUIDE LINES (THERMOPLASTIC) (WHITE)		
40949755201	0025	0300	0711 5 2	GUIDE LINES (THERMOPLASTIC) (YELLOW)		
40949755201	0030	0300	0711 31	TRAFFIC STRIPE SKIP (THERMOPLASTIC)(WHITE)		
40949755201	0035	0300	0711 32	TRAFFIC STRIPE SKIP (THERMOPLASTIC)(YELLOW)		
40949755201	0040	0300	0711 33	TRAFFIC STRIPE SKIP (THERMOPLASTIC) (WHITE)		
40949755201	0045	0300	0711 34	TRAFFIC STRIPE SKIP (THERMOPLASTIC) (YELLOW)		
40949755201	0050	0300	0711 35 61	TRAFFIC STRIPE SOLID (THERMOPLASTIC)(WHITE) (6")		
40949755201	0055	0300	0711 35 81	TRAFFIC STRIPE SOLID (THERMOPLASTIC)(WHITE) (8")		
40949755201	0060	0300	0711 35121	TRAFFIC STRIPE SOLID (THERMOPLASTIC)(WHITE) (12")		
40949755201	0065	0300	0711 35181	TRAFFIC STRIPE SOLID (THERMOPLASTIC)(WHITE) (18")		
40949755201	0070	0300	0711 35241	TRAFFIC STRIPE SOLID (THERMOPLASTIC)(WHITE) (24")		
40949755201	0075	0300	0711 36 61	TRAFFIC STRIPE SOLID (THERMOPLASTIC)(YELLOW)(6"		
40949755201	0080	0300	0711 36 81	TRAFFIC STRIPE SOLID (THERMOPLASTIC)(YELLOW)(8"		
40949755201	0085	0300	0711 36181	TRAFFIC STRIPE SOLID (THERMOPLASTIC)(YELLOW)(18		

original contract or have been added through the Change Order process. Locate the pay item you wish to report work against. You will need to know the Financial Project number and category to ensure you have the correct work item.

🔟 🕌 🗣 😤 🗅 🖨 🔰 🖬 🖓 💆 🛸 📷 📂

Contractors

Contractor Equip.

Inspector: Lovett, Kathy Date: 02/14/05

👪 AASHTO SiteManager

Hork Reports

DWR Info.

Contract ID: E1E45

File Edit Services Window Help

Once you have highlighted the appropriate pay item, either use **Services** – **Record Work Item** or the **Record Work Item** icon from the toolbar or double click the item to display the window where work will be reported.

.000 To:

Material Inspection Detail

Cont Est Matri Qty Satisf Repr Matri Qty Reprt Matri Qty Matri Unit

window where work will be reported.	· · ·	0949755201 Line Itm Nbr: 0005 Item Code; 0102 14 Category Nbr: 0300
window where work will be reported.	Item Desc: TR.	AFFIC CONTROL OFFICER Unit Price: \$10000
😹 Daily Work Reports		
DiwR Info. Contractors Contractor Equip. Daily Staff Work Item	ns Force Accounts	Qty Reported to Date: 0.000 Qty Authorized to Date: 0.000 Units Type: MH Qty Installed to Date: 0.000 Bid Qty: 120.000 Pay To Plan Qty:
Contract ID: E1E45 Inspector: Carter, Steve Date: 08/21/09		Qty Paid to Date:
Project Nbr: 40949855201 Line Itm Nbr: 0005 Item Code: 010214 Category Nt	br: 0300	Location Installed Placed Qty. Plan Page Number Templt Used
Item Desc: TRAFFIC CONTROL OFFICER Unit Price:	\$.10000	Roadway 2.0000
Supp Desc 1:		
Supp Desc 2:		2.000 Plan Page Nbr: 0 Contractor: AMERISEAL NORTHEAST FLORIDA, INC. ** PRIME *** •
di inspirios de balo. J	nits Type: MH	Location: Roadway Measured Indicator:
Qty Installed to Date:	To Plan Qty: 🗌	Station Offset Distance Station Offset Distance
Status: Active Qty Paid to Date: .000 Current Contract Qty: 210.000		+ .000 To: + .000 .000
Loc Seq Nbr Location Installed Placed Qty. Plan Page Number Templt U	sed	Material Inspection Detail nponent Cont Est Matri Qty Satisf Repr Matri Qty Reprt Matri Qty Matri Unit
1 along proj 50.0000 🗌	Ē.	
Placed Qty: 50.000 Plan Page Nbr: 0 Contractor: AMERISEAL NORTHEAST FLORIDAJN	IC ** PRIME ** 🗾	
As Built Qty:	r Measured Indicaton	With the Work Report window displayed, make sure
	C.V	the middle of the window has the fears and then pro

With the Work Report window displayed, make sure the middle of the window has the focus and then press the **New** icon on the toolbar to enter a new location to report work. Work will be reported by location in the lower portion of the window by entering the following

Daily Staff

Work Items

fields.

Placed Quantity – Enter the quantity of the work for the pay item to be recorded for the contractor. This quantity is what is paid for on an estimate.

h

.000 C N

000

From:

Material Component

000

- 🗆 ×

Force Accounts

As Built Quantity -- This column is a field that will be used to record the As Built Quantity on the work item record. This field is <u>informational</u> only and does not affect estimate calculations.

Contractor - From the drop down list select the contractor for which you are reporting work.

Location – Enter some description about location where work is to be performed.

All of the other fields are optional at this time and if you wish to enter information you can do so at this time. The **Measured Indicator** is used to indicate that a placed quantity was either measured or not measured. The default is **N**. You will need to select which button is correct for the quantity you submitted. If you field measured the quantity, then select **Y** for yes or **N** if you did not field measure the quantity. For example, if you counted the quantity or kept field records for the quantities, then this would be a **Measured** quantity.

If you are observing another contractor working on the same pay item for this contract then you can repeat the steps above to enter another location and pick that contractor from the drop down list.

Save the information recorded.

Repeat this process for all items you are paying for on this DWR and for all contractors that you are observing.

The big difference between our previous system and SiteManager is that in SiteManager a DWR is by inspector with multiple contractors while our previous system required you to complete a daily for each contractor being observed.

Helpful Hints:

The "Qty. Installed To Date" and "Qty Paid To Date" do not update until an estimate is approved. If previous payments need to be reviewed before an estimate is approved, this will have to be done in DWR History section of SiteManager.

Force Account Tab (Not Used by FDOT at this time)

The **Force Account** section of SiteManager will not be used by FDOT at this time. It could be used in the future to pay for work done by contractor where we have instructed work to be paid for by labor, equipment and materials. This will be documented at a later date as the need arises.

DWR Reports What You Should Know

The difference between our previous Daily Inspection Report and this one contained within SiteManager is that previously an Inspector had to complete a Daily Inspection Report for each contractor being observed. In SiteManager the **DWR** is specific to an Inspector and all work being observed by an inspector will be recorded on the single DWR for the day no matter how many contractors are observed.

Work reported on a DWR is not used on an estimate until it has been associated to a Diary and approved. If you find an error on a DWR, it can be unapproved and corrected as long as it has not been paid on. If an error is found after payment has been made, you must create a new DWR with the appropriate change to correct the error that was made. This correction would be reflected on the next estimate paid.

Maintaining a Master List

The **Master List** is a listing of all personnel, supervisors and equipment for the contractors working on this contract as well as Department/Consultant Staff working on this contract. A generic list of equipment, personnel, and supervisors is available for use by the inspector on this contract each day the inspector completes a **Daily Work Report**. If a contractor furnishes the Department with an electronic file that contains his specific equipment, etc., it can be loaded using the **Vendor Master List Load Utility**. See instructions for use below.

AASHTO SiteManag					
e <u>E</u> dit <u>S</u> ervices <u>W</u> ir					
🎟 👫 🗣 😤 🗋	🛎 💐 🖬 🖓 🖬				
Daily Work Report	;				_[
DWR Info.	Contractors	Contractor Equip.	Daily Staff	Work Items	Force Accounts
Contract ID: T1047	Inspector:	Lovett, Kathy Date	: 02/14/05		
contract ID: jr 1047	inspector.	Loven, Kariy Date	Nbr of	<u> </u>	
Contractor			Nbr of Supervisors	Nbr of ₩orkers	Contractor Hrs Worked
F650595477001 GCE :	SERVICES INC		-		.000
					ours
upervisor/Foreman	lame				ours orked
upervisor/Foreman	Name Missing Supervisors				
upervisor/Foreman	Missing Supervisors	must be added to the mast	er list before they can be rec	w	
upervisor/Foreman	Missing Supervisors	must be added to the mast	er list before they can be rec	w	
upervisor/Foreman	Missing Supervisors	must be added to the mast	er list before they can be rec	w	
upervisor/Foreman Personnel Type	Missing Supervisors		er list before they can be rec	w	

Loading the Generic List to a Contract

If when you attempt to add either, Contractor Personnel, Supervisors, Equipment or Staff Member to the selected contractor on the appropriate tabs and you get the screen shown at the right, then you must move the **Generic List** to the contract.

From the **SiteManager Main** panel double click the **Daily Work Reports** icon then double click the **Reference Tables (DWR+)** then double click the **Contract Master List** as shown below.

Main Pa	anel) Da	aily Work F	eports(+))		
Select Contract Vendor				(·)			×	Select Contract Vendor
2 Contract ID							ate agei	Contract ID E1E49
nd :							'ts(Find : Fi
Contract ID	Vendor ID Fe	ed State Proj Nbr	Status	County	Lvi 2 Lvi	3 Lvl 4 Loca		20-0745118 CENTRAL FLORIDA STRIPING
0934 VF6		3004U	ACTV	16 17 01	01 106 01 106 01 113		lte T	59-256553 GULF COAST BORING & PIPELINE, INC. 59-3042773 TRANS-PHOS, INC. 59-3324026 FLORIDA LANDSCAPE AND DESIGN
1103 VF8 1103-R1 VF8	840915605002 095 840915605002 095	i1557U i1557U	ACTV PEND	17 17	01 106 01 106	AT BR # 170021 AT BR # 170021		593421520 DON ROBINSON CONCRETE, INC. VF060421150002 CENTRAL FLORIDA HOT MIX THE LANE CONSTRUCTION C
1143 VF5	592651115001 100	11044P	ACTV	07	01 106	SR 80 east of CR 7		VF592871792001 SENTRY BARRICADES, INC. VF850005286001 SDUTHERN ROAD BUILDERS OF POLK
	OK	Cancel					ster	OK Cancel

A contract selection screen will pop up as shown in the screen below.

Highlight the contract you want and press **OK** or double click the contract and the list of contractor/sub contractors associated with the contract will be displayed as shown on the right. Highlight the vendor you want the master list on and press **OK** or double click on it.

The contract master list window will be displayed as shown on the right. If you want the whole list available for use, just press the Add All button and it will transfer over to the Contract Vendor List column. If you want to select certain records, you can hold the SHIFT button down to select a range of records shown in a row or hold the CTRL button down to independently select records that are not shown in a row. After selecting the records you want, just press the Add button and the records will transfer to the Contract Vendor List shown on the right hand side of the screen. All entries moved over will have the Active box already checked. If you have some that are not going to be used for this contract, just remove the check out of the Active box. To save the data, just press the icon that looks like a disk on the tool bar or go to File then Save. The Staff Member tab is the only tab that does not contain the Active box. You are ready to start reporting on your DWR's at this point.

AASHTO Sit	eManager			
le <u>S</u> ervices	<u>Window</u> Help			
🚥 🕌 💵 :	🐒 🚅 🚔 🔒			
🕹 Contract N	1aster List			_ 🗆 🗙
Contract ID:	,,		RN ROAD BUILDERS OF PO	K
Vendor Ma	ster List:		Contract Vendor List:	
Eqp ID	Equipment I)es 🔺	Eqp ID	Equipment Descri
gen - 01	Air Compressor			
gen • 02	Air Hammer			
- gen - 03	Arrow Board			
gen - 04	Asphalt Distributor			
gen - 05	Asphalt Paver			
gen - 06	Automobile			
gen - 07	Backhoe			
gen - 08	Barge	<u>A</u> dd ->		
gen - 09	Boat	Add All ->>		
gen · 10	Boat Motorized	_		
gen - 11	BobCat	<- Remove		
gen • 12	BobCat W/Attachments	<<- Rem All		
gen - 13	Boom Truck			
gen - 14	Box Tractor			
gen · 15	Bridge Segment Gantry	-1		

Vendor Master List Load Utility

Vendor Master List Load Utility Getting Started

The **Vendor Master Resource Load Process** provides a method to load contractor equipment resources for each vendor in SiteManager. The process uses the built-in function in SiteManager called "Attachments".

From the **SiteManager Main Menu** panel select **Accessories**. Select **System Attachments** from the **Accessories Menu** as shown in the screen below.



This will display the screen shown below.

Name	Туре	Description	Autoru
TRNSDQR	Plug	Reports	
TRNSDQU	Plug	Update	
SIM Web Reports	Plug	SIM Web Reports	
MMS	Plug	Maintenance MMS	
CopyContract	Plug	Maintenance CopyContract	
MMS Batch	Plug	MMS Batch	
VendMast	Plug	Vendor Master List Load Utility	
TEST	URL	wfwe	

Double click on the row labeled **VendMast** or highlight the row with **VendMast** and click on the icon for the 'running man'. The screen shown below will appear.

MastLoad (FrmMain)

On this screen you will identify the vendor you wish to load resources for and the location of the file that contains the resources to be loaded.

Select the method for searching the vendor list by clicking on either **Vendor Name** or **Vendor Number**.

In the area underneath "**Select Vendor Number**" or "**Select Vendor Name**" (depending on which was selected above) type a portion of the number or name to go to that area of the list.

Once you have found the correct vendor, highlight the name (or vendor number) and the appropriate information will be shown in the area below the list.

On the right side of the screen you will select first the drive and directory where the resource file is stored. In the middle portion on the right side of the screen select the appropriate file name of the resources to be loaded.

Find Vendor By:	C Vendor Name	Load File Location
	Vendor Number	룾 o: [\\dotvcofp001\appdata\] 💌
Select Vendo	or Number	0: \
		Siteman Con 1982kl
010569979001		🗖 rtf
01-0597015 01-0702154		
017589375001 02-0656317		
02-538693		MakeXML.txt setup32a1.txt
027461995001 03-0373571		setup34a.txt
03-0393497 03-0402658		sm.ini
04111700000 04-3112211	•	Smdbl00.db Smhelp.hlp
	_	
Vendor Nam	.e	File Path
,		
ок	H	elp Exit
·		

Florida DOT Construction Office

Vendor Master Custom List Load Utility

Once you have selected all information press **OK** to continue and the window on the right will be displayed.

This is to confirm the information you selected on the previous screen and will also show the **Current Master Items** for the vendor as well as the **Master Items to be Loaded**.

If everything looks okay press the "**Load**" button. If you need to correct something then press the "**Back**" button.

Exit will take you out of this program completely.

Once you have press the "**Load**" button, your data will be loaded and you will be advised as to how many items were loaded and if some of the items already existed on the vendor's master list you will be notified. This load program will ensure that no duplicates (that is no duplicated Ids) are loaded for the vendor.

endor Number	VF591683951001						
endor Name	C W ROBERTS CONTRACTING INC						
'urrent Master æms	equp 1 11983 FORD RANGER P/U equp 10 101991 FORD PASSENGER VAN equp 100 1001 1994 GMC K2500 P/U 4X4 equp 101 1011 1997 GMC K2500 P/U 4X4 equp 101 1011 1997 GMC K2500 P/U 4X4 equp 102 102 1996 FORD F250 P/U 4X4 SC equp 103 103 1999 FORD F250 P/U 4X4 SC	•					
oad File	v:\SiteManager\Contractor Master List\District 3\CW Ro	oberts					
		-					
Iaster Items to e Loaded	equp 1 1 1989 FORD RANGER P/U equp 2 2 1994 FORD RANGER P/U equp 3 31994 FORD RANGER P/U equp 4 41994 FORD RANGER P/U equp 5 51991 FORD RANGER P/U	-					

DWR On-line Reports

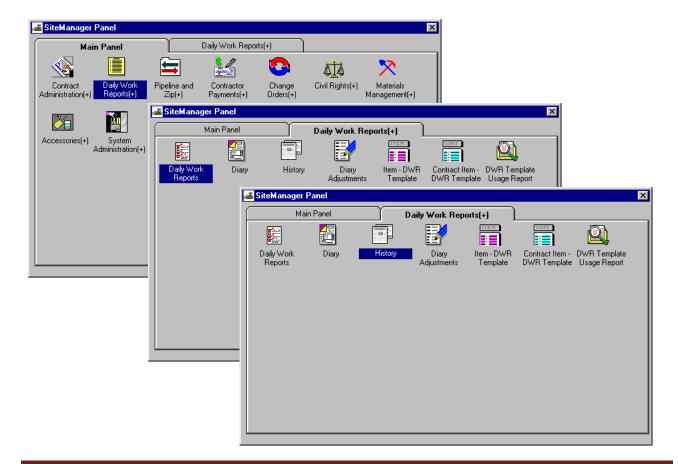
To access the DWR on-line reports, select Daily Work Reports from the SiteManager Main panel.

User's Handbook

Select History from Daily Work Reports panel by double clicking on the icon.

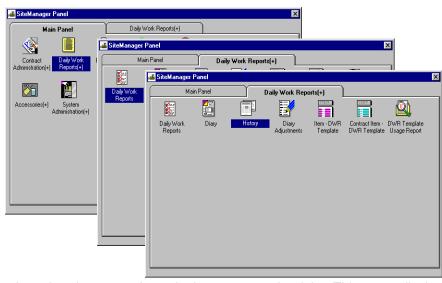
SiteManager Panel	V		_		×			
Main Panel	Daily We	ork Reports(+)	1					
	SiteManager P		~				2	I
Contract Daily Work F Administration(+) Reports(+)	Main	Panel Daily Work Reports(+)					-1	
	i	🚢 SiteManager P					-	
	Daily Work Reports	Mair	Panel	Daily	y Work Repor	ts(+)		
Accessories(+) System Administration(+)	ricpons				1	ITEM	CONT	
		Daily Work Reports	Diary	History	Diary Adjustments	Item - DWR Template	Contract Item -	DWR Template Usage Report
					-			

Once selected, the following screen will be displayed. This first report is the **DWR History** which shows the DWR data grouped by date. As you can see at the right, the report displays the inspector ID, DWR date, whether the DWR is locked, whether the DWR is authorized, has the DWR been paid, high and low temperature, AM and PM conditions, when work was suspended or resumed, whether daily staff was on board, was work installed, and whether or not a contractor was on site.



User's Handbook

🚢 AASHTO Sitel	lanager								
<u>F</u> ile <u>E</u> dit <u>W</u> indow	<u>H</u> elp								
🛛 🎟 👫 🗣 😤	🗃 🖆 🛧	+							
🚢 History									
DWR Histo	огу 🍸	Work Item H	istory 🌱	Contractor	History				
Contract ID: 3	0002	1							
RPT-ID: RD	WRHCON	SysTES	T Florida	SysTEST	DATE:	09/18/2000	_		
USER: cn9	182kl	Dep	partment of Tr	ansportatio	on PAGE:	1 of 7			
DAILY WORK REPORT HISTORY FOR CONTRACT: 30002 GROUP BY DWR DATE									
Inspector ID	D₩R Date L	.ocked Au	ithorized Pai	High d Temp	Low AM Temp Condition	PM Condition			
cn982kl	09/15/2000	No	No No)					
Remarks: No			Wo Suspende Indicat	ed	No Daily Staff on Site:	Yes			
			Wa Suspenda Tir		No Work Items Installed:	Yes			
			Resum	ork 00:00 ed ne:	No Contractor on Site:				
•									



Next select the **Work Item History**

tab to view the report shown in the screen on the right. This report displays the work item history grouped by DWR date. It displays the line item number, project number, category number, item code, description, installed quantity to date, bid quantity, final quantity, date, user ID, location installed, contractor ID, reported quantity, from station, offset, distance, and to station, offset, distance.

AV 🚟	ASHTO SiteMa	anager						
<u>F</u> ile	<u>E</u> dit <u>W</u> indow	<u>H</u> elp						
	👫 🗣 😤	🛎 🛧 🔸						
	listory							
	DWR History	v Y	ork Item Histo	ry Cor	ntractor History			
Cor	ntract ID: 300	002						
Г								_
	RPT-ID:	DWRHWIH	SysT	FEST Florid	la SysTEST	Γ	DATE: 09/18/2	2000
	USER:	cn982kl	De	epartment of 1	ransportation	I	PAGE: 1 of 1	
				EM HISTORY GROUP BY DA	FOR CONTRA	ACT: 30002		
	Line Pro Item Nbr Nb	oject Cat or Nbr			ATE	CT: 30002 Installed Q To Date	ty Bid Qty	Final C
		or Nbr	(Item	GROUP BY DA Description	ATE	Installed Q	ty Bid Qty 3,360.000	Final G .000
	ltem Nbr Nb	or Nbr	ltem Code	GROUP BY D/ Description SIGNS COM (TEMP - PC	ATE INSTRUCTION IST MOUNTED)	Installed Q To Date		
	ltem NbrNb 0030 19363 Date	vr Nbr 1815201 100 User ID 994 cn982kl	Item Code 0102 75 Location Ins Up the creek	SROUP BY DA Descriptio SIGNS COM (TEMP - PC talled	ATE INN ISTRUCTION IST MOUNTED) Co CO	Installed Q To Date 0 ntactor ID 02439008	3,360.000 Reported Qty 30.000	
	Item Nbr Nb 0030 19363 Date 10/20/13	vr Nbr 1815201 100 User ID 934 cn982kl Station	Item Code 0102 75 Location Ins Up the creek Offset	SIGNS CON CTEMP - PC talled Distance	ATE INTRUCTION IST MOUNTED Co CO Station	Installed Q To Date 0 ntactor ID 02439008	3,360.000 Reported Qty 30.000 fset Distance	
	ltem NbrNb 0030 19363 Date	vr Nbr 1815201 100 User ID 994 cn982kl Station	Item Code 0102 75 Location Ins Up the creek	SIGNS CON CTEMP - PC talled Distance	ATE INN ISTRUCTION IST MOUNTED) Co CO	Installed Q To Date 0 ntactor ID 02439008	3,360.000 Reported Qty 30.000	
1	Item Nbr Nb 0030 19363 Date 10/20/13	vr Nbr 1815201 100 User ID 934 cn982kl Station	Item Code 0102 75 Location Ins Up the creek Offset	SIGNS CON CTEMP - PC talled Distance	ATE INTRUCTION IST MOUNTED Co CO Station	Installed Q To Date 0 ntactor ID 02439008	3,360.000 Reported Qty 30.000 fset Distance	

The last report available to you is under the **Contractor History** tab. This report is grouped by contractor and then by date. This report displays contractor name, DWR date, user ID, equipment description, equipment number, number of pieces, number used and hours used.

story DWR His	tory Y W	/ork Item History	Con	ractor His	tory				[
ract ID:	30002								
								_ _	
	D:RDWRHEQP	SysTEST	Florida	SysTES			09/18/2000		
USER	: cn982kl	•		nsportatio			1 of 1		
		EQUIPMENT H				0002			
-			UP BY CU	NTRACTO	JR/DATE				
	tor: AJAX CONSTR	RUCTION INC.							
	ite: 10/20/1994			_					
User ID	Equipment Description			Eqpmint ID	Nbr of Pieces	Nbr Used	Used Hrs		
cn982kl	87878 Roller			87878	1		5.000		
	ite: 10/17/1994								
User ID	Equipment Description			Eqpmint ID	Nbr of Pieces	Nbr Llsed	Used Hrs		
cn982kl	87878 Roller			87878	1	, 1	5.000		

Any of these reports can be printed by going to File drop down menu and then by selecting the Print Option

This page left blank intentionally.



Florida Department of Transportation

User's Handbook

IV. Diary Approval Function

Release 3.9b

January 2010

Diary Approval Getting Started

From the **SiteManager Main** panel double click on the **Daily Work Reports** icon and then double click on the **Diary** icon to display the **Authorize** tab.

📕 SiteManager Panel		×	
Main Panel	Daily Work Reports(+)]	
🛛 🚳 📃 🔄	🛃 📀	ATA 🔀	
Contract Daily Work Pipeline a Administration(+) Reports(+) Zip(+)	nd Contractor Change Payments(+) Orders(+)	Civil Rights(+) Materials Management(+)	
Accessories(+) System Administration(+) Manuals	+) SiteManager Panel Main Panel Daily Work Diary Reports	Daily Work Reports	×1

Authorize Tab

Require	d Fields:
Contract ID:	System(key)
Diary Date:	System(key)

Remember, if the **Contract ID** is missing then you will need to use the **Services** menu option, **Choose Keys** to select the correct contract. After selecting the appropriate contract and highlighting it, press **OK** to return to **Authorize** tab.

The Appropriate Engineer or Lead Inspector is required to authorize all **Daily Work Reports** for each day. Only those Daily Work Reports that have been approved by this process will be included in the Estimate Generation process.

This authorization is done as follows.

- 1. On the **Diary Date** field enter the date for which you want to authorize DWRs.
- For each of the DWRs displayed for the date, highlight them and then using the Services menu, select Preview DWR or click on the Preview DWR icon to display the highlighted DWR. If information is correct and complete then close screen to return to Authorize tab.

🚢 AASHTO SiteManager	
<u>File Edit Services Window H</u> elp	
🔤 📑 🗣 😤 🗅 😂 🏂 🔛 🐻	
🞿 Diary	
Authorize Charge	
Contract ID:	
Diary Date: 00/00/00	
Inspector Authorized	Authorized Date
Remarks:	
	*
	T

3. Check the box under the field **Authorized**. This will enter the current date under Authorized Date. This will lock the DWR making changes impossible by the inspector. The Project Administrator can take the approval off of a DWR and the Inspector can then make changes as long as the DWR has not been used

in an estimate. If the DWR was used in an estimate, the only way to correct changes to it is to create a new DWR and make appropriate changes to compensate for the mistake made in the first DWR – it is important to make notes on why these changes are being made. This DWR should be dated the day you found the mistake but make sure you note what the date of the DWR you are making a correction to.

- 4. Repeat these steps for each DWR displayed.
- 5. **Remarks:** Add any additional comments for this contract for the specific areas listed under the **Remarks**. This is the proper place for Engineers/Lead Inspectors to add any comments that need to be recorded for the day (i.e., Important verbal instructions to the contractor, discussions with the inspectors, significant events of the job, etc.).
- 6. Use the Save icon to save the information entered.

Charge Tab (Not used by FDOT at this time)

Required	d Fields:
Contract ID:	System(key)
Date:	System(key)
Charge Type:	System

Once you have completed the **Authorize** tab, you can then go to the **Charge** tab. Every day will be shown as a "charge" day under the **Charge** tab <u>except</u> when the Project Administrator or other personnel needs to make payment on an estimate either before time begins or after Final Acceptance. Time charges run on a continuous basis and any changes in time are documented as Change Orders in SM.

🛋 🗛	HTO Si	eManager							_ 8 ×
<u>File</u> <u>E</u> o	bit <u>S</u> ervi	ces <u>W</u> indow <u>H</u> elp							
🛛 🖽 🕌	i 📭 🕯	2 🗅 🖆 🥸 🖬							
🚢 Dia	ry								_ 🗆 🗡
Auth	norize	Charge							
Contra	act ID:	30002 Date: 10/20/94							
	Cha	де Туре		Total	Number of Diaries:	1			
	• Fu			Total D	iary Charge Days:	1.00			
		lf Day Credit Reason			No Charge Days: iary Charge Days:	0.00			
	C No	Charge	•		No Charge Days:	0.00			
	Mistn			Charge	Credit				
	Nbr	Milestone Description		Amount	Reason				
ļ									
Ready					Ser	/er	TEST	SMADMIN	cn982kl

Save the information entered.

If you have not defined **Milestones** for your contract then the lower portion of the window will not be used. If you have valid **Milestones** defined for the contract you can use the lower portion of the window to define appropriate time charges and/or credit for these **Milestones**. To do this, do the following from each defined **Milestone**.

- 1. Place focus in the lower portion of the window.
- 2. Press the New icon from the toolbar to insert a new row in the lower portion.
- 3. In the field **MIstn Nbr** use the search lens to find the appropriate **Milestone** to be reported. Once highlighted press **OK** to return to the **Charge** tab.
- 4. In the field **Charge Amount**, select the appropriate **Charge Type** from the drop down menu.
- 5. If No Charge was entered as the Charge Type, then select the appropriate Credit Reason from the drop down menu.
- 6. Repeat these steps for each of the Milestones to be reported.

Page left blank intentionally



Florida Department of Transportation

User's Handbook

V. Estimates Generation Function

Release 3.9b

January 2010

Estimates Generation: What You Should Know

In SiteManager estimates are defined as Progress Estimates, Final Estimates and Supplemental Estimates. Because in SiteManager no further charges can be made against the items in the contract once the Final Estimates has been approved, FDOT will use the Progress Estimate process to generate the various estimates we need for payment, leaving the Final Estimate to be generated only when we are sure there will be no further payments made on the contract. Supplemental Estimates are available should a situation arise where we must pay an estimate after the final has been approved. No pay items can be addressed on a Supplemental Estimate.

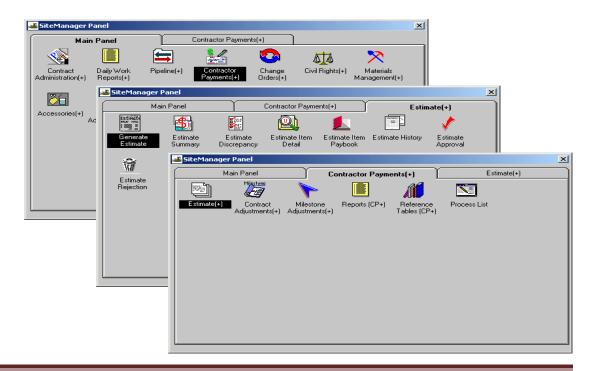
During the Contract Activation function the Contractor Payment Approval Levels must be set so that the first level of approval is set to the group of the person that will be responsible for generating the estimates. If this was not done at that time the person will not be able to generate an estimate. Prior to generating the first estimate you should still check the Estimate Approval levels to ensure that they are correct. See below for how to define the approval levels for the contract.

It should be noted that the Estimate Approval process provided within SiteManager can be defined specifically for a contract and can be changed during the life of the contract. For example, this would occur whenever there is a change in project personnel or when the field has completed their preparation of the Estimate package and the Final Estimates process has begun. The District Final Estimates staff should redefine the Estimate Approval process so that no other estimates can be generated by others outside the District Final Estimates Manager's Office. In addition the Contract Authority should also be adjusted to remove all users except the appropriate Final Estimates personnel.

Estimate Generation: Getting Started

Require	d Fields:
Contract ID:	System(key)
End Date:	System
Туре:	System

To perform the **Estimates Functions** double click the **Contractor Payments** icon on the **SiteManager Main** panel. From the **Contractor Payments** panel, double click the **Estimate** icon.



Make sure all DWR's have been compiled and approved in the diaries through the estimate period. The user can check this in the **DWR History** section.

If you get the message that states, "You don't have authority to Generate Estimate" then you should check the Estimate Approval window to see what group you must be logged in as to generate an estimate.

If the **Contract ID** is blank then you will need to use **Choose Keys** from the Services menu item to locate the appropriate contract. Once you have highlighted it press **OK** to return to the **Generate Estimate** window.

- 1. Check the Estimate Number. If this is the first estimate to be generated the **Generate Estimate Number** will be **001** and the **Last Estimate Number** will be blank.
- 2. Check the **Begin Date**. This should be the **Notice to Proceed Date**. The End Date will default to the current system date but can be changed by either typing the correct date in the field or by selecting the date on the calendar. Normally this date would be the monthly cutoff date.
- 3. Make sure the estimate **Type** is correct depending on the type of estimate you are generating.

<u>NOTE: Only the District Office Final Estimates staff should select the Type of</u> Estimate as a FINAL. If you mistakenly check the FINAL button, the system will not let you do anything else.

- 4. The Delay Generation checkbox will not be used by FDOT.
- 5. Select Generate Estimate from the Services menu or use the Generate Estimate icon on the toolbar.



<u>Note</u>: If you have generated this estimate before, the window at the right will be displayed. This is a warning message that means the current estimate

and all adjustments will be deleted. If this is acceptable, press Yes to continue.

6. You will now receive the following notices as your estimate has been submitted and processed.

AASHTO 9	SiteManager	×				
i	Job submitted to	BACKGND				
		Client Jol	b Monitor	2	×	
	<u>OK</u>	٩	Process OCPINTESA	submitted.	ł.	
				DPS State	tus Monitor	×
			OK	(i)	Profile OCPINTESB for process SMBAPP has complet	:ed
					OK	

The estimate has now been processed by the batch server. **<u>NOTE</u>**: This is just a process, no report is generated. See below for estimate reports.

Adjusting an Estimate

From time to time it is necessary to **Adjust an Estimate** due to failed or defective materials, behind schedule retainage, penalties, fuel adjustments, bituminous adjustments and others. Adjustments can be entered for the contract or for any pay item on the contract. All adjustments entered for an estimate will be marked as to when and who entered them. Currently SiteManager automatically calculates adjustments such as fuel adjustments, stockpile adjustments and regular retainage, if used, and these will be entered as "System" generated adjustments. To enter any

A DESCRIPTION OF A DESC					
	(pastroents	and the second			الا التاريخ
Descripti	Proj Dia	libution			
Contract ID:	Pive				
Estimate	Entered Date	Adjustment Description	Rask. Uses ID	Adjustment	
0032 02		Discislantive	ef intoic	#180.000.00	
	Entered Date: 83/20	O4 User ID: En10ic	Est. Nbc: 5002	0	
Adjustmen	d Description Incent				
Adpest	ment Amount: 100.00	0.00			
Remarks	18 days @ 10.000 /	/ dag			

adjustments to an estimate, the estimate must first be generated. The following provides information and examples as to how adjustments are entered into SiteManager.

NOTE: When it is necessary to change an adjustment that has been created, DELETE the adjustment in question and re-enter it completely. Do not try to correct the quantity as failure to delete the adjustment may result in an inaccurate estimate.

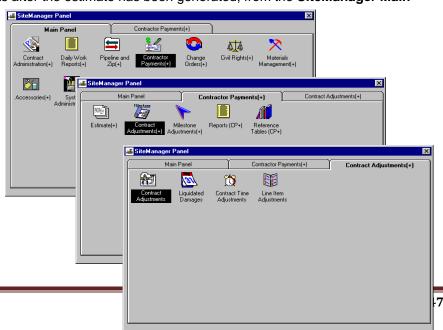
Contract Level Adjustments

Required Field	ds:
Contract ID: Entered Date:	System(key)
Userid:	System(key) System(key)
Estimate Nbr:	System(key)
Adjustment Description: Adjustment Amount:	System System
Location:	System
Remarks:	FDOT

Contract Level Adjustments are those adjustments that are made at the contract level for a given estimate. To enter these types of adjustments after the estimate has been generated, from the **SiteManager Main**

panel double click on the Contractor Payments icon to display the Contractor Payments panel. Then double click on the Contract Adjustments icon to display the Contract Adjustments panel. This will display the Contract Adjustments panel as shown below.

From this panel, select the **Contract Adjustments** icon and if you have not already selected your contract on another window you will be presented with a list of contracts that are available to you for entry of adjustments. Just



January 2010

double click on the contract you wish to work with and the **Contract Adjustment** window shown below will be displayed. This window is divided into two parts. The upper section of the window displays the list of adjustments, if any, that have already been entered for this contract.

Contract Adjustment Proc Databasis Descriptions End Databasis Contract Discription Rail: Uses 10 Adjustment Discriptions End Databasis Fill Databasis Discription Rail: Uses 10 Adjustment Discription End out = (000004 Uses 10: (on 10) Adjustment Adjustment End out = (000004 Uses 10: (on 10) Adjustment Adjustment Discription End table: (0000 Adjustment Adjustment Discription End table: (0000	کلہ
andraet DI: [57102] Calmand: Date: BC/2004 Adjustment Description Reak User ID Adjustment DI: DC/2004 Incenting Description (Particle International Description (Particle In	
Contract Contract Adjustment Description Real Uses ID Real Description Real Part Rea	
Nu Due Acception During Control of the ID Section Acception Accept	
2 2020/04 browning Outprocessing	
Adjustment Description Frontise Durcentise	
Adjustment Description Frontise Durcentise	
Adjustment Description: Treative Discontine	
Adjustment Description: Security Discontine	
Adjustment Description: Security Discontine	
Adjustment Description: Treative Discontine	
Remarks [18 days @ 10.000 / day.	

Remember that the system automatically generates adjustments, such as liquidated damages or regular retainage (if used) and these will be shown with the User Id of "SYSTEM".

The lower portion of the window is used to enter new adjustments. If this is the first adjustment to be added you can just go to the lower portion and begin entering the data else you will need to insert a new line. To insert a new line, you can press the **New** icon on the toolbar or enter **File**, **New** on the menu. Once the new line is inserted and is highlighted you can then enter the information in the lower section of the screen.

The following describes the fields that are shown on this screen.

- 1. Adjustment Description: This is a drop down menu of standard reasons why an adjustment is being made. Select the appropriate reason.
- 2. Adjustment Amount: Enter the total amount for this type of adjustment. If this is to be a credit to the contractor then it should be entered as a *negative* number.
- 3. Reference Document: This field is not required and will not be used initially.
- 4. **Remarks:** You should include a descriptive phrase as to why this adjustment is being entered. This information will be helpful to the Final Estimates process as well as documentation for any other audit later on. Use as much detail as you feel is necessary to describe the justification for the adjustment.

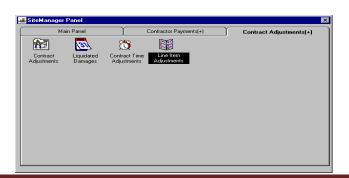
Once you have entered all of the information then save the Information, by pressing the **Save** icon on the toolbar or using **File, Save** on the menu.

Line Item Adjustments

Required Fields:						
Contract ID:	System(ke					
Estimate Nbr:	y)					
Project Number:	System(ke					
	у)					
	System					
Line Item Number:	System					
Туре:	System					
Quantity:	System					
Unit Price:	System					

From the same **Contract Adjustment** panel as shown above, double click the **Line Item Adjustment** icon to display the **Line Item Adjustments** window shown on the next page.

As in the Contract Adjustment process above, if you have not already selected a contract number to work with you will be presented a list



of contracts that possibly could have adjustments made to them. These are contracts that have pending estimates on them. Double clicking on the contract you wish to work will display the estimates that exist for

that contract. Double clicking on the estimate you want to work with, this will always be the one listed on the top, which is the current estimate that is being processed. If you select an estimate that has already been approved and paid, you get the message shown on the right. Pressing OK allows you to pick either another contract or the correct estimate. Remember, you cannot adjust an estimate that has already been paid. You can only adjust the estimate that is in



pending status and has not been approved by the first level approver.

Once you have selected the appropriate contract and estimate the Line Item Adjustments window shown here will be displayed.

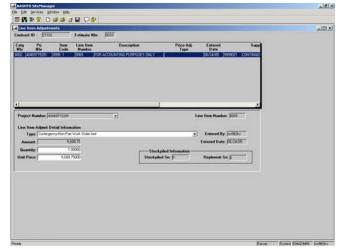
The upper portion of the window will display any adjustments that have already been added to this Estimate. If there were line item adjustments made automatically such as fuel or stockpile payment then these will be

listed here and if you want to review them you just highlight each one and the display in the lower portion of the window will change to show details of the adjustment including who entered the adjustment. In the case where the adjustments were done automatically by the program then the Entered By field would display SYSTEM.

If you wish to enter a new adjustment, then you will need to insert a new line in the upper portion of the window. To insert a new line use the New icon on the toolbar or use File New from the menu. Highlighting a blank line on the top portion of the screen will display blanks in the lower portion to be completed.

The following describe the fields that are shown on the Line Item Adjustments window.

1. Project Number: The FDOT Financial Project ID on this contract where the item to be adjusted is assigned. If there is more than one Financial Project ID then the drop down menu will have all Financial Project ID's that exist for this contract.



- 2. Line Item Number: This designates the item that is to be adjusted. Each pay item that exists on the contract has been assigned a Line Item Number. If you already know this you can enter it or you can use the Search Lens to display all Line Item Numbers with the appropriate pay item number and descriptions. The Line Item Numbers displayed this way will only be those for the Financial Project ID that was selected above.
- 3. Type: This is a drop down menu from which you can make the appropriate selection for the type of adjustment that is being made.
- 4. Reference Document: This field will not be used initially and can be left blank.
- 5. Amount: This is the total amount of the adjustment being made. It is preferred that you do not use this field, rather, use the quantity and unit price fields below. If you enter a total here the Quantity and Unit Price fields will not be available for entering information.
- 6. Quantity: This is the quantity of the item that is being adjusted by the unit price entered below. Only available for entry of data if the *Amount* field was left blank.

7. Unit Price: This is the unit price for the item quantity entered above. Only available if *Amount* field was left blank.

The remaining fields on the screen are automatically entered by the system and are not changeable by the user. They are:

- 1. Entered By: This is the User ID of the person who entered this adjustment. If the adjustment was entered automatically by the system then the User ID would be SYSTEM.
- 2. Entered Date: This is the date that the adjustment was entered.
- **3. Stockpile Sn:** If the adjustment was for Stockpiled Material then this would display the original Stockpile Sequence number that was used to adjust this item.
- **4. Replenish Sn:** If the adjustment was for Stockpiled Material and the Original Stockpile had been replenished then this would display the Replenish Sequence number that used to adjust this item.

Florida Department of Transportation Trns*port SiteManager

User's Handbook

Estimates Generation Function

A **Remark** entry should be made for adjustment before being saved. To enter a **Remark** just click on the *"Remarks*" icon on the tool bar and the window on the right will be displayed.

The "*Remarks*" icon is the "cartoon balloon" on the right end of the toolbar below the Menu line.

Enter your remarks in the window and then click on the "*Remarks*" icon again to save them. Your remarks should include sufficient descriptive information to document just what the adjustment is and, if necessary, how it was calculated. First 3 lines of remarks will be shown on estimate as description for this adjustment.

Line Item Adjust					_10
atg Pri Nbr Nbr 302 40469715201	Remarks (General Remarks) :	2	9999021 (COV	Supp Name	
	Detail Information :	×	Line Item Number: 1005	<u>.</u>	
	gency-Non-Part Work Dider Ant		Entered By: cn903ks		
Amount: Quantity:	5.689.75		Entered Date: (06/24/05		
Unit Price:	5.689.75000	Stockpiled Information Stockpiled Sn: 0	Replenish Src D		

Once you have entered all of the information for an adjustment press the **Save** icon on the toolbar or use **File Save** on the menu.

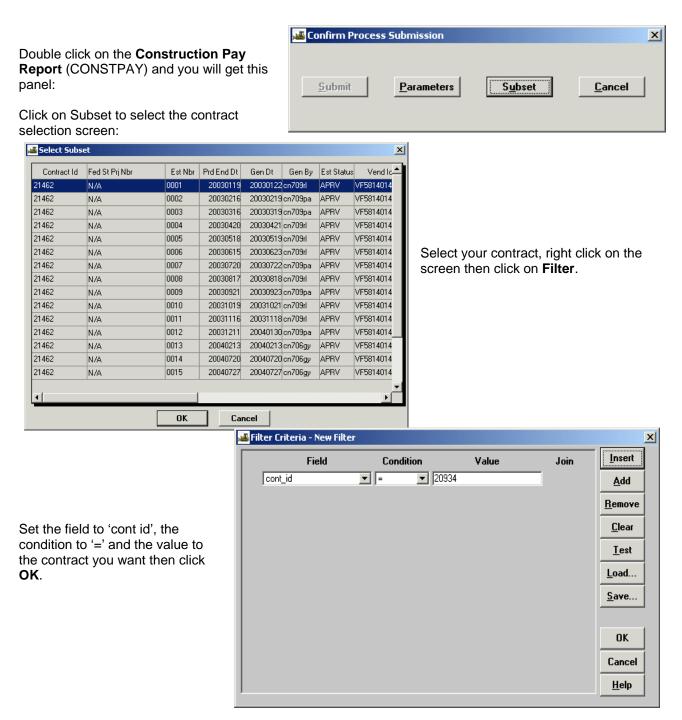
<u>Note:</u> If there is an error in the entry of an adjustment, just delete the adjustment and re-enter it. NEVER just make a correction to an adjustment as this can cause your estimate to be incorrect.

Printing and Reviewing the Estimate Report

There are multiple reports available, both internal and external to SiteManager, that can be used to review the estimate to determine its correctness.

The preferred internal report is called the **Construction Pay Estimate**.

To print the estimate report, double click on the Process List icon on the Contract Payment panel.

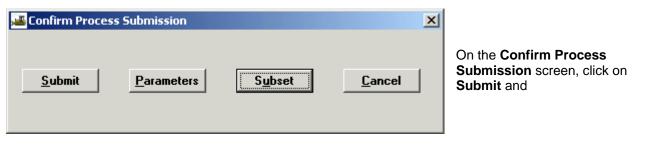




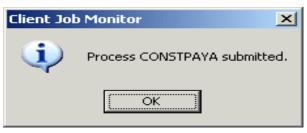
The Filter Message will tell you how many rows (number of estimates) will be returned. Click **OK**.

Contract Id	Fed St Prj Nbr	Est Nbr	Prd End Dt	Gen Dt	Gen By	Est Status	
20934	0423004U	0000	20030420	20030505	SYSTEM	APRV	VF6503940
20934	0423004U	0029	20030518	20030528	cn106jc	APRV	VF6503940
20934	0423004U	0030	20030615	20030623	cn115ss	APRV	VF6503940
20934	0423004U	0031	20030725	20030725	kn106gm	APRV	VF6503940
20934	0423004U	0032	20030821	20030821	kn106gm	APRV	VF6503940
20934	0423004U	0033	20030921	20030924	kn106gm	APRV	VF6503940
20934	0423004U	0034	20031019	20031023	kn106gm	APRV	VF6503940
20934	0423004U	0035	20031116	20031120	kn106gm	APRV	VF6503940
20934	0423004U	0036	20031214	20031219	kn106gm	APRV	VF6503940
20934	0423004U	0037	20040118	20040122	kn106gm	APRV	VF6503940
20934	0423004U	0038	20040215	20040218	kn106gm	APRV	VF6503940
20934	0423004U	0039	20040321	20040322	knpbjtm	APRV	VF6503940
20934	0423004U	0040	20040405	20040405	kn106gm	APRV	VF6503940
20934	0423004U	0041	20040418	20040420	knpbjtm	APRV	VF6503940
20934	0423004U	0042	20040514	20040514	knpbjtm	APRV	VF6503940

From the subset list, select the estimate you wish to run then click **OK**.



you will receive this message, click OK:



Next click on the Services menu and select Process

Status. You can continually refresh (File>Refresh) this screen or simply wait for the completion screen to pop up:

🚢 AASHTO SiteManager										_ 8 ×
Eile Edit Services Window	Help									
🔄 🎬 🗣 😤 🚔 🧕										
🚢 Process Status										
Regular Scheduled	1									
Ľ										
Process Name		Status	Date	Queue	Start Time	End Tin				
		518183	Submitted	Time						
CONSTPAYA	Completed		6/7/2005	01:00 pm		01:05 pm				
CONSTPAYB	Completed		6/7/2005	01:03 pm	01:03 pm	01:07 pm				
CONSTPAYC	Completed		6/7/2005	02:18 pm	02:18 pm	02:22 pm				
CONSTPAYD	Completed		6/7/2005	03:22 pm	03:22 pm	03:26 pm		-		
CONSTPAYA	Completed	DPS Status	Monitor				×	1		
								-		
		(i) F	Drofile CONS	STRAVD 6		CONST	PAY has completed			
			Fronie Cora.	DIFAIDI	or proces:	CONDI	FAT has completed			
						_				
				f	OK Ì	1				
						-				
						Þ				
Ready								Server	Systest SMADMIN	cn982ks

Double click on the line that represents the estimate process just completed, then double click on the Output line and the estimate will be displayed

	STPARC STD A	
	1 ^{er} Show system Nes	
Name OUTPUT THT PROCLOG THT	Size Dute Time 1433(4/7200) 1422222 0624/72005 142222	
Sycand	16266-772005 14.18.33	
	🚄 AASHTO SReManager	X
	Elle Edit Services Window Help	
	View File OUTPUT.TXT for Process CONSTRAYA	
	Rpt-ID: CONSTPAY v3.2 Florida Date: 06/10 - User: Department of Transportation Page: 1	
	Contractor Estimate Summary	
	Vendor: ID:: VF650394050001	
	Contract ID: 20934	
	Contract Description: 03-41-803	
	Contract Location: FROM PALERMO PLACE TO US 41 BUS (BYPASS N)	
leady	Contractor: GLF CONSTRUCTION CORPORATION	
	Critical Dates Rey Dates Let: 04/31/2000 Time Hegani 00/00/1 Awarded: 07/39/2000 Final Acceptance: 00/00/1 Contract Executed: 00/00/0 Material Certification: 00/00/1	
	Notice to Proceed: 04/02/2001 Paid Off: 00/00/i Work Began: 04/02/2001 Passed: 00/00/i Vork Began: 04/02/2001 Passed: 00/00/i Offer Locepted: 00/00/i 0/00/i	
	Vork Began: 04/02/2001 Passed: 00/00/ Final Payment Offer: 00/00/	

This report contains detailed information needed to determine if the estimate correctly reflects what should be due the contractor for the pay period.

- 1. The first page contains basic contract information as well as the current contract status.
- 2. The second page contains a contract summary that displays the regular work, contract adjustment and line item adjustments for the current estimate and the previous estimates.
- 3. Subsequent pages detail the items paid during the period as well as detail line item adjustment information.
- 4. The final page contains the project totals and contract grand totals.

Once you have determined the amounts are correct, approve the estimate. A message will be sent to the next reviewer for approval. Refer to the Estimate Approval process below for instructions on how to do this.

The next levels of reviewers/approvers should review the estimate and approve accordingly. If errors are found in the next level of approval, rejection should be made and the first level approver will need to correct the estimate and generate/review/approve accordingly. With the approval levels set as discussed below, last level of approval done by an individual will cause the estimate to be picked up by the Electronic Estimates Disbursement (EED) system (as discussed below). This automated system will review the system to determine if errors exist that will keep the estimate from being paid without manual intervention. If, errors are found then the system will hold the estimate until they are resolved. If the errors can be resolved then EED will automatically process the estimate for payment and return the final level of approval to SM. If errors prevent the estimate from being paid in its current configuration, control of the estimate can be returned (rejected) back to the originator for deletion or correction. Once corrected, the whole approval process must be started again. Once the EED level approves the estimate, **no** further changes can be made to the estimate.

SiteManager updates the header information of reports each time an estimate is ran. SiteManager also does not automatically save a report when you close it. So if you generate a report on a certain date and do not save it, the next time that you generate that report the header information will be for the date that it is generated.

Conclusion: If you want a Change Order, Estimate Summary to Contractor or any other SiteManager report to have the header information reflect the contract status at the time the report was first made correctly, you must **save** the report as a PSR (previously saved report). If this is done the header will correctly reflect the contract information at the time of the report.

Deleting an Estimate

An estimate that is still in 'Pending' status (has not had any approval done) can be deleted during the review process by following the steps below. This is only necessary where a change in the generated estimate is needed, not in the adjustments. In the case where only adjustments are going to be changed after the initial entry it is not necessary to delete the estimate just delete the adjustment and recreate it.

If an estimate has been approved at any level, it must first be rejected back to the originator before it can be deleted.

To delete an estimate: From the **SiteManager Main** menu select the **Contractor Payments** icon. Then select the **Estimates** icon from the **Contractor Payments** menu. Finally select the **Estimates History** icon from the **Estimates** menu. The following screen will appear. Select your contract either by double clicking your mouse on the contract or by pressing **OK** once you have the contract number highlighted. This will display a list of estimates for your contract. The only one that you can delete is the current one that has not had any approval done on it as of yet. Highlight the estimate and then either use **Edit – Delete** from the menu or click on the "**trash can**" icon.

Payment Approval Level Management

Required Fields:						
Contract ID:	System(key)					
User Group:	System					

SiteManager has a very extensive payment approval process that can be set up to conform to each district's estimates work flow process.

In addition to the internal approval process there is an external approval process known as **Electronic Estimates Disbursement** or **EED.**

🛎 SiteManager Panel					×
Main Panel	C	ontractor Payr	nents(+)	Reference Tables (CP+)	
Milestone	-			_	
Estimate(+) Contrac Adjustment		Reports (CP+)	Reference Tables (CP+)	
	🚢 SiteManager I	Panel			×
	Mai	n Panel		Contractor Payments(+)	Reference Tables (CP+)
	8 3	<u>j</u>		5 83	
	Price Adjustment Maintenance	Autopay Item	Contract Discrepancy	Contractor Payment Approval Levels	
			Options	Approvancevers	

A full description of this

process is contained in a separate manual but the basic purpose of **EED** is to further automate the processing of estimates through the state accounting system and to acknowledge payment of those estimates by writing an approval back to SiteManager.

This is accomplished by setting the last approval to **EED** for all estimates except those that are generated as part of the Final Estimates process. Those will be set to **EEDFINLS**.

It is recommended that there be at least two levels of approval at the district level prior to EED.

From the Contractor Payments panel double click the Reference Tables icon.

Once you Double click the **Contractor Payment Approval Levels** icon the **Approval Levels** window shown below will be displayed.

₽¶ D @ @			and set land
val Levels			.ID X
	Contract ID: [21562 US 19 (AT DREW ST]		
Estimate Typ	n: Progess 💌 🗖 Use System Defaults		
	Description		
Level Number	User Group		
1	Titice Express		
	Dist 7 Resident Project Engineer		
2	Dist 7 Final Est Stat		
	Dist 7 Final Estimates Stall		
3	Compholer		
202	EED approvals		
	dennederate and a state		
		Server Systest SMADMIN	cróliúks

Initially the **System Default** approval levels will be displayed but these should be changed, those unique to your district.

<u>Note:</u> There is a drop down next to **Estimate Type**; this is because a separate approval process can be set for the progress, final or supplemental estimate types. The process for setting approval levels is the same for all types, varying only in the groups selected. Setting progress estimate approvals should be done as part of the activation process. Setting final estimate approvals can wait until the final estimate process begins.

The first level should always be the **User Group** for the person who is to generate the estimate. Generally this is the Project Administrator or Office Engineer.

The intermediate level(s) can be used for whatever groups (Resident Engineer, District Office Engineer, etc.) necessary in the approval process in your district. In any case, the next to last level should be the individual responsible for final approval of the estimate before it is submitted to **EED** for processing.

To change any level, use the drop down menu under **User Group** for each and select the appropriate group from the list. You can enter a generic name, title or specific name on line above the **User Group**.

NOTE: You cannot use the same user group at more than one level.

To delete unneeded levels, set the cursor on the name line and click the delete icon on the tool bar.

Make sure you **save** any changes you make to this screen by using either the **File – Save** command on the menu or the **Save** icon on the toolbar.

To reset the approval levels to the System Defaults, just click in the checkbox for Use System Defaults.

Estimate Approval Process

Generally, the estimate approval process will follow these steps. The estimate will be generated, printed and reviewed and once the estimate is determined to be correct, the first level approver should indicate estimate is approved. The estimate will then be forwarded to each subsequent approver for their review and approval or rejection. Once the estimate has reached the **EED** level, it will be the responsibility of the last reviewer to test the estimate for errors in accordance with EED procedures. All errors that are the responsibility of the district must be resolved before the estimate is released for payment in EED.

It's important to <u>note</u> that, once an estimate has received final level approval, that estimate cannot be changed, deleted or unapproved. For purposes of an audit trail it now stands as "paid" in SiteManager. That's why it's important to review and seek signoff of estimate prior to the final level of approval.

Generation of Printed Estimate For Comptroller.

Until we modify the SiteManager standard report "Summary to Contractor", it will be necessary to produce a printed Estimate similar to the "green bar" estimate that has been used for both District Contract Prototype (DCP) System and Construction Reporting System (CRS). This printed estimate will be used by the Comptroller Office to do their review and edits prior to sending it being transmitted to the State Comptroller for payment. The final level of approval within SiteManager should not be done until notice is received back from the Comptroller's Office that the estimate has been paid. If errors are found by the Comptroller's Office then you may need to regenerate the estimate to correct the error. **Errors cannot be fixed or estimate rerun once the final level of approval for the estimate has been entered.**

The following instructions should be followed in generating this printed estimate.

Instructions:

Method 1

- Logon to mainframe TSO.
- At TSO ready prompt type 'tso TSM'.
- Choose option 'A' SiteManager Pay Estimate.
- Follow instructions for data entry of contract and estimate number.
- After all input data is entered press 'ENTER' or 'PF3' for job submission screen.
- Enter job submission data and choose printing option.
- Enter 'SUB' on command line and press ENTER.
- Choose option 'Z' to view job.

Instructions:

Method 2

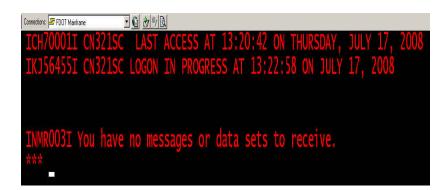
- Logon to mainframe TSO.
- At Master Application Menu, choose option 6, Information Management Systems.
- At Information Management Systems menu, select 'TSM'.
- Choose option 'A' SiteManager Pay Estimate.
- Follow instructions for data entry of contract and estimate number.
- After all input data is entered press 'ENTER' or 'PF3' for job submission screen.
- Enter job submission data and choose printing option.
- Enter 'SUB' on command line and press ENTER.
- Choose option 'Z' to view job.

Find below the instructions for method 1 . . .

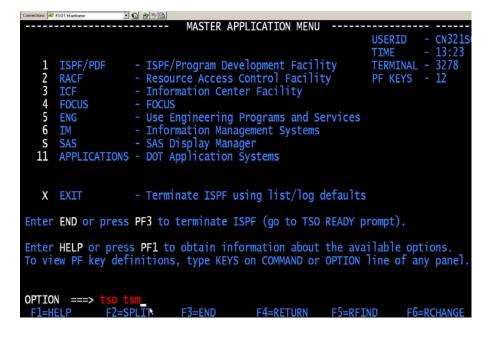
When you log into Mainframe/DOTNET, this screen will come up. Select TSO and hit enter.

	<u>A</u> CTIONS	<u>o</u> ptions	<u>c</u> ommands	<u>F</u> eatures <u>H</u>
			CL/SUPE	RSESSION Main
Se	lect session	s with a	"/" or an	action code.
	Session ID	Descript	ion	
	PCR TSO EED FLAIR FM	TSO/E EED Syst FLAIR Sy	/stem	eport ent System

This screen will come up. Press enter to move on.



This screen will come up. Type in "tso tsm" on the OPTION line bottom left and hit enter.



This screen will come up and you will need to choose option "A" and hit enter

SESSIONI - EXTRAI (or Windows 98 / Windows	NT			S C X
		CR M N			
	TRNSPORT	INTERFACE TO	O (PES,LAS,SIT	EMANAGER, DSS	
OPTION ===>					
		DDUCTION - IN NTERFACE MEN		USERID DATE TIME	= CN321SC = 04/06/09 = 15:34
8 - ADD-REFR	GER PAY ESTIN ESH TRNSPORT ESH TRNSPORT ITEM HISTROIO	PROJECTS	(SITEMANAGER (PES,LAS) (PES,LAS) (DSS))	
X - EXIT		******	******	******	******
	W JOBS SUBMI		QUESTIONS, CAL DINATOR OR CEN		
SELECT OPTIC	N AND PRESS				
F1=HELP	F2=SPLIT	F3=END	F4=RETURN	F5=RFIND	F6=RCHANGE
F7=UP	F8=DOWN	F9=SWAP	F10=LEFT	F11=RIGHT	F12=RETRIEVE
8	0.10	2			02/17
constant to board TL MOSTEL DO	STATE FLUG (156 75 178 194) 0	TTP9D00		r	NUM DI34 PM

Type a "C" on the second line first column along with the contract # and Est # and hit enter. Hit the F3 key to submit.

	or Windows 98 / Windows N	IT			_ & ×
Eile Edit View Tools Ses	sion <u>O</u> ptions <u>H</u> elp				
	- 🗷 🖗 🖬 🔪 🕳 🖉				
	TRNSPOR	T INTERFACES	S TO (PES.LAS.S	SITEMANAGER)	Row 1 to 2 of 2
COMMAND ===>					
COMMAND					
	A - 1	SITEMANAGER	PAY ESTIMATE		
THIS PROGRAM	PRINTS THE P	AYMENT ESTIN	MATE REPORT FOR	R CONTRACTOR	PAYMENTS.
			E BY MAINTENANG		
	TIPLE CONTROL			CE AND CONSTR	ocrion.
""NOTE: MOL	TIPLE CONTROL	CARDS ALLOW	NED.		
**ENTER CONT	<code>FRACT# , ESTIM</code>	ATE# AND PRE	ESS ENTER FOR :	JOB CARD.	
PE3 SUBMIT	PF4 MAIN ME	NU PE7 PAG	SE BACK PES	PAGE EORWARD	
			DE DACIC TION	AGE FORMARD	
				RD ID = ANY U	NIQUE CHARACTERS
SEL= A(ADD)	C(CHANGE) D(DELETE) CONT	TROL CARDS. CAP	RD ID = ANY U TRAINING	NIQUE CHARACTERS
	C(CHANGE) D(DELETE) CONT		RD ID = ANY U	NIQUE CHARACTERS
SEL= A(ADD)	C(CHANGE) D(DELETE) CONT	TROL CARDS. CAP	RD ID = ANY U TRAINING	NIQUE CHARACTERS
SEL= A(ADD)	C(CHANGE) D(DELETE) CONT	TROL CARDS. CAP	RD ID = ANY U TRAINING	NIQUE CHARACTERS
SEL= A(ADD) SEL CARD I	C(CHANGE) D(DELETE) CONT	FROL CARDS. CAP ESTIMATE#	RD ID = ANY U TRAINING	NIQUE CHARACTERS
SEL= A(ADD) SEL CARD J	C(CHANGE) D(DELETE) CONT RACT#	FROL CARDS. CAP	RD ID = ANY U TRAINING CONTRACT	
SEL= A(ADD) SEL CARD J	C(CHANGE) D(DELETE) CONT RACT#	FROL CARDS. CAP	RD ID = ANY U TRAINING CONTRACT	NIQUE CHARACTERS
SEL= A(ADD) SEL CARD J	C(CHANGE) D(DELETE) CONT RACT#	FROL CARDS. CAP	RD ID = ANY U TRAINING CONTRACT	
SEL= A(ADD) SEL CARD J	C(CHANGE) D(DELETE) CONT RACT#	FROL CARDS. CAP	RD ID = ANY U TRAINING CONTRACT	
SEL= A(ADD) SEL CARD I C 01	C(CHANGE) D(CONT E3C33_	DELETE) CONT RACT#	FROL CARDS. CAP ESTIMATE# 00004 om of data ****	RD ID = ANY U TRAINING CONTRACT	****
SEL= A(ADD) <u>SEL</u> CARD 1 <u>C</u> 01 ************************************	C(CHANGE) D(CONT E3C33_ **********************************	DELETE) CONT RACT# ****** Botto F3=END	FROL CARDS. CAP ESTIMATE# 0004 om of data *** F4=RETURN	RD ID = ANY U TRAINING CONTRACT - ***********************************	*************** F6=RCHANGE
SEL= A(ADD) SEL CARD I C 01	C(CHANGE) D(CONT E3C33_	DELETE) CONT RACT#	FROL CARDS. CAP ESTIMATE# 00004 om of data ****	RD ID = ANY U TRAINING CONTRACT	****
SEL= A(ADD) SEL CARD I C 01 ***********	C(CHANGE) D(CONT E3C33_ **********************************	DELETE) CONT RACT# ****** Botto F3=END	FROL CARDS. CAP ESTIMATE# 0004 om of data *** F4=RETURN	RD ID = ANY U TRAINING CONTRACT - ***********************************	*************** F6=RCHANGE

Florida Department of Transportation Trns*port SiteManager

User's Handbook

Enter in any information that is filled out on this screen that is not filled out on the screen you are looking at. To be able to preview an estimate before it prints, you need to enter a "Q" in the Message Output Class field. This sends the estimates to a queue for viewing later. This would save some paper if the estimate was found to be incorrect.

ENTER THE FOL	LOWING:				EXAMPLES	
USERID			===> CN321SC		RD999XX	
ACCOUNT NU	IMBER		===> 5590321			
PROJECT RE	QUEST NUMBE	R	===> 99999999		33344466	6
	T LOCATION		===> LTLGT3E3		DIST3, L	TCNT7XX
JOB CLASS					2,5,7,8,	
	TPUT CLASS				A(PRINT)	
FORMS :	CLADU				in the second se	
	/2 GREEN BA	R STANDARD			1	
	/2 GREEN BA				ENTE	R
	/2 WHITE 3-				'x'	
	11 WHITE LE				FOR	
	11 LASER PR		4)		FORM	
	11 LASER PR				FORM	
NUMBER OF		INI (CENI O	01			
		2110	UE> 01		DTH	
LAST NAME	===> CARTER	РНО	NE ===> 922194		BIN SEE>	
ENTER SUR ON	COMMAND I TH		ENTER KEY TO			
ENTER SUB ON	COMMAND LIN	E AND PRESS	ENTER KEY TO			
F1=HELP	F2=SPLIT	F3=END	F4=RETURN	F	5=RFIND	F6=RCHANGE
F7=UP	F8=DOWN	F9=SWAP	F10=LEFT		1=RIGHT	

Type in "sub" on the command line and hit enter.

jie <u>E</u> dit ⊻iew <u>T</u> ools <u>S</u> e	for Windows 98 / Windows ssion Options Help 30 3 № 2 10 0 0 2 2				_ 8
COMMAND ===			ORMATION(MANDAT	ORY)	
ENTER THE USERID			===> CN321SC	EXAMPLES A RD999XX	
ROUTE P JOB CLA MESSAGE	REQUEST NUMBE RINT LOCATION	R	===> 5590321 ===> 9999999999 ===> LTLGT3E3 ===> 8 ===> Q	33344466 DIST3, L 2,5,7,8, A(PRINT)	TCNT7XX 9
14 X 14 X 8 1/2 8 1/2	8 1/2 GREEN BA 8 1/2 GREEN BA 8 1/2 WHITE 3- X 11 WHITE LE X 11 LASER PR X 11 LASER PR	R 2-PART PART TTER SIZE INT (DIST 1		ENTE X' FOR FORM T	
NUMBER	OF COPIES ME ===> CARTER		===> 01 NE ===> 9221949	_ BIN ===>	
ENTER SUB	ON COMMAND LIN	E AND PRESS	ENTER KEY TO S	UBMIT JOB	
F1=HELP F7=UP	F2=SPLIT F8=DOWN	F3=END F9=SWAP	F4=RETURN F10=LEFT	F5=RFIND F11=RIGHT	F6=RCHANGE F12=RETRIEVE
nnected to host TLHOST01 D	0 : 00 .	1			02/20

Make sure your Route Print Location has the L Term of your printer session. (Make sure you have the printer session running) Once you have set it, you probably will not want to change it. Type an "x" on the line 14×8 $\frac{1}{2}$ Green Bar Standard. You may also have to fill in your last name and phone # as shown in this insert.

This will bring you back to the initial screen. Here you can look at the estimate by typing a "z" for IOF in the option line.

	<u>i m di ist sidis m</u> i					
	TRNSPORT INTER	FACE TO ((PES,LAS,SIT	EMA J	OB NOT	SUBMITTE
	PRODUCTIO		4	USERID DATE TIME	= CN3 = 04/ = 15:	06/09
- ADD-REFRE - ADD-REFRE	ER PAY ESTIMATE SH TRNSPORT PROJEC SH TRNSPORT VENDO TEM HISTROICAL PR	CTS (RS ((SITEMANAGER (PES,LAS) (PES,LAS) (DSS)			
C - EXIT 2 - IOF (VIEW	JOBS SUBMITTED)	**************************************	EXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	L YOUR DISTR		

After the job has ran, you will eventually come to the following screen. Type an "s" in the first column and hit the enter key.

ESSIONI - EXTRA) for Windows 98 / Windows NT Edit Yew Tools Eastern Optons Earp I I I I I I I I I I I I I I I I I I I					
OMMAND ===>	IOF JOB L1 Output	st Menu		LL ===> 9	SCREE
JOBNAMEJOBIDACT-5 1 CN321SCA J006448 SEL	STAT-OWNER	-DEST/DEVICE	RECS-		
@:00.1					05/03

Florida Department of Transportation Trns*port SiteManager

User's Handbook

This screen will come up. If everything ran right, to look at the estimate, type a "b" in the line that contains "SYSPRINT" (most if the time line 6. Just look for the largest size file.) and hit enter.

Connections: 🖂	FDOT Mainframe	<u>.</u> 🙆 ớ 🦻 🖄	Attn PA1 PA2	Reset PF01 PF	F02 PF03	PF04 PF0	5 PF06	PF07 PF08	PF09	PF1I
			IO	F Job Sun	mary					
COMMA	√D ===>							S	CRO	LL
JOB	NAMEJOBID-	STATUS	SRAN/R	ECEIVED		DAY		DEST-		
	32SCA J00118									
	- PGM									
0	SORT		STEP1	SORTD						
0	IEBGENER	STEP2								
0	IKJEFT01	GO	STEP3	EPDB2						
	DDNAME	-STEP		-STAT-ACT	-C-G	RP-D-	SIZE-	U-DES	T	
	LOG	*		HELD	0	1 н	20		P122	
	2 JCL			HELD	õ	1 H	20		P122	
	MESSAGES			HELD	ò	1 H		L LPI		
-	SYSOUT	SORT	STEP1	HELD	ò	1 H		L LPI		
-	SYSPRINT	STEP2		HELD	0	1 H		L LPI		
_	SYSPRINT	GO	STEP3	HELD	õ	1 H		L LPI	and the second second	
-¥	SYSTSPRT	GO	STEP3	HELD	Q	1 H	8		P122	
-	SYSOUT	GO	STEP3	HELD	õ	1 H	20		P122	
-	515001	00	JILIJ	HEED	×	± 11	20	L L L	1 1 4 4	

The Estimate will come up and you can browse using the F7 and F8 key for up and down, the F10 and F11 key for moving right and left.

If you want to print the estimate, type an "r" to release to the printer in the line that contains "SYSPRINT" and hit enter. The estimate will come out where ever you told it to go to in the setup screen. This is handled in the "Route Print Location" and should contain the L term for you print session.

This page left blank intentionally



Florida Department of Transportation

User's Handbook

VI. Change Order Management Function

Release 3.9b

January 2010

Change Orders, What You Should Know

What FDOT currently calls a Supplemental Agreement or Time Extension are just types of SiteManager **Change Orders**. To SiteManager any contract change is called a Change Order. Each of these will be entered using the Change Order function. There are certain administrative functions that can be addressed by this function also. Definitions and uses will be described below.

SiteManager allows for developing a contract change, reviewing and approval of contract changes on-line.

In developing a Change Order in SiteManager you will create a header, address item changes, additions or deletions and/or address contract time issues. When completed, there is a report called the 'Contract Change Report' that can be printed out that represents a summary of the changes.

The report, printed out and combined with the remaining portion of the document is then sent around to all parties for review and approval. As the change is reviewed each level, the reviewer can accept or reject the change from within SM. On final approval the status will change from pending, to approved. The approval of change orders can occur anytime during the estimate cycle and it will not interfere with the estimate process. Because we are required to track more information pertaining to an SA or Time Extension than what is allowed in SM, a separate system for tracking this information was developed. This parallel system is called the **Contract Change Tracking System**.

Change Order Types And Uses

A Supplemental Agreement is used to increase or decrease existing contract items, add new items and/or make adjustments to contract time under certain conditions

Unilateral Supplemental Agreement: Covers the same functions as above but used to document and pay for work or time where we do not have agreement with the contractor on the value of such changes.

Contingency SA: Will be used to add an additional contingency item as the contingency funds encumbered for the contract are exhausted. Recording actual payments against for work under an Contingency SA will be done as Line Item Adjustments. Tracking of work orders for actual type of work performed and reasons for work will continue to be tracked within our Contract Change Tracking System.

Time Extension Agreements: Any agreement reached with the contractor for additional contract time not documented under any of the following types of extensions.

Weather Days Time Granted: Time allowed for days when weather conditions prevent the contractor from effectively working on the controlling items of work.

Contingency Work Order/Field SA Time Adjustments: Used to document time granted under either of these documents.

Movement of Items Within Contract: This is an administrative function used when work is needed on a specific project but the pay item for that work does not exist on that project but does exist on another project within the contract. Use only when the contractor agrees to perform the additional work at the contract unit price. The basic rule of this function is to reduce the plan quantity on the donor project by one unit and add that same item with a quantity of one unit to the target project using the same unit price thereby showing a net change of \$0.00. This CO type requires only one level of approval.

It is anticipated that an enhancement to SiteManager will be implemented that will allow us to track and code all information in SM that we currently track within our Contract Change Tracking System.

Definitions

The following are definitions that are used within the Change Order function of SiteManager.

- 1. Change Order Header This refers to the definition of the contract change. With this screen you will associate the change to a contract, change type, reason code and link to either a dispute or force account. This linking process is not currently in use.
- 2. Function These are predefined within SiteManager to establish what is to be included within a given change order. The functions defined are Over/Under Run, Extra Work, Time Extension, Force Account and Final Quantity. Any combinations of these can be done except Final Quantity can only be done alone and not include any of the other functions.
- **3.** Change Order Type The FDOT defined type of contract change. Examples of these might be Supplemental Agreement, Time Extension or Contingency SA.
- 4. Change Order Items These are items that are included on the Change Order. Change Order Items can include items that are currently on the contract and these are called "New Change Order Item". Change Order can also include items from the Master Pay Item list that are not currently on he contract and these are referred to as "New Contract Item".
- 5. Change Order Time Adjustment This is where you would add/delete days from the contract or possibly alter a contract milestone.
- 6. Change Order Explanations This is where you would provide the various explanations for any contract changes. This information is printed on the Contract Change report to detail any special instructions or information for the contract.
- **7.** Change Order Approval This is the process in which a change order is distributed through SiteManager to other users who have been defined to review and approve the change order.
- 8. Change Order Approval Level This refers to the different individuals that have been assigned to review and approval change orders. Different levels exist for different type of change orders and combination of functions for a change order.
- **9.** Forward To SiteManager allows you to forward the change order to other SiteManager users for their review while the change order is in Draft mode. This is different than the Change Order Approval in that reviews can be done concurrently while in the approval it must be done in order.

Contract Change Orders Getting Started

To begin a **Change Order** double click the **Change Orders** icon on the **SiteManager Main** panel. This will display the **Change Orders** panel. Double click the **Change Orders Maintenance** icon to enter the **Change Orders Maintenance** panel. Double click on the **Header** icon to display the **Change Orders Header** screen.

😹 SiteManager Panel				X	
Main Panel	Change (Irders(+)			
	🔄 🛃		ata 🔀		
Contract Daily Work Administration(+) Reports(+)	Pipeline and Contract	or Change C (+) Orders(+)	ivil Rights(+) Materials Management	(L)	
	Zip(+) Payments		Managemen	((+)	
	🚢 SiteManager Panel				×
Accessories(+) System Administration(+)	Main Pane		Change Orders(+)	Change Order Mainte	nance(+)
	Maintenance(+)	s (CO+) Reference			
	b	SiteManager Panel	~~~~~		×
		Main Pan		Change Orders(+)	Change Order Maintenance(+)
		L	1 🕅		📓 🛃 🛛
			ge Order Change Order ems Time	Change Order Item Summary Explanations	Review /
			Adjustments		Approve
		Tracking			

Change Orders Header

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

Change Orders.

- 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

- 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

Veter Window Heb We Contract ID: Contract ID: CO Number: O Federal 200000 Contract ID: Federal 20000 Contract ID: Federal 20000 Federal 200000 Contract ID: Federal 20000 Contract ID: Federal 20000 Federal	HTD SiteManager		-
for Contract ID: CO Number: D [Tentative Vential Approval Dates: Federal: 000000 Local; 000000 Status: 1001 Description: CO Type: CO Type: Uventide Approval Level: Co Type: Uventide Approval Level: Co Type: Uventide Approval Hules Functions: Uventide Approval Hules Functions: Co Free Account Find Quentide Approval Hules Find Quentide Approval Prove Account Find Quentide Account Find Quentide Approval Prove Account Find Quentide Approval Prove Account Find Quentide Approval Prove Account Find Quentide Approval Prove Account Find Quentide			
Contract ID: CO Number: D Federal: 2000/00 Locat; 2000/00 CO Created by: CO Number: D Federal: 2000/00 Locat; 2000/00 Status: Droft Approval Level: Description: Reason Code: CO Type: CO Type:	▮♥♀		
CO Created by: CO Created by: CO Created by: CO Created by: CO Created by: CO Type: CO Coreated Data CO Coreated Data Coreated Coreated Data Coreated Data Corea	der		-
CO Created by: CO Created by: CO Created by: CO Created by: CO Type: CO			
CO Created by: CO Created by: CO Created by: CO Created by: CO Created by: CO Type: CO Coreated Data CO Coreated Data Coreated Coreated Data Coreated Data Corea			
CO Created by: CO Created by: Statu:: Diot Approval Level Description: Reason Code: CO Type: Uversde Approval Hules Function: Uversde Approval Hules Function: Oversde Approval Hules Function: Function: Oversde Approval Hules Function: Oversde Ap			
CO Created by: CO Created by: Statu:: Diot Approval Level Description: Reason Code: CO Type: Uversde Approval Hules Function: Uversde Approval Hules Function: Oversde Approval Hules Function: Function: Oversde Approval Hules Function: Oversde Ap			
CO Created by: CO Created by: Statu:: Just Approval Level Description: Reason Code: CO Type: Uverside Approval Hales Function: Overun/Underwr Force Account Find Quantity Reference to: Time Adjustment Find Quantity CO Type: Common Adjustment Find Quantity Common Bill Contact Ant: 1000 Current Contact Ant: 1000			
CO Created by: CO Created by: Statu:: Just Approval Level Description: Reason Code: CO Type: Uverside Approval Hales Function: Overun/Underwr Force Account Find Quantity Reference to: Time Adjustment Find Quantity CO Type: Common Adjustment Find Quantity Common Bill Contact Ant: 1000 Current Contact Ant: 1000			
CO Created by: CO Created by: Statu:: Just Approval Level Description: Reason Code: CO Type: Uverside Approval Hales Function: Overun/Underwr Force Account Find Quantity Reference to: Time Adjustment Find Quantity CO Type: Common Adjustment Find Quantity Common Bill Contact Ant: 1000 Current Contact Ant: 1000			
CO Created by: CO Created by: Statu:: Diot Approval Level Description: Reason Code: CO Type: Uversde Approval Hules Function: Uversde Approval Hules Function: Oversde Approval Hules Function: Function: Oversde Approval Hules Function: Oversde Ap	a	Tentalise Verbal Annoval Dater	
Status: Dist Approval Level Description: Reason Code: Uvenued/Dedervor Freez Accesses Functions: Uvenued/Dedervor Freez Accesses Functions: Description: Find Quantanet Find Quantation Context Ant: \$50.00 Context Context Ant: \$	Contract ID: CO Number: 0	Federal: 00/00/00 Local: 00/00/00	
Status: [Dist) Approval Level Description: Reason Code: CO Type: Uvenued Approval Hules Functione: District Work Functione: District Work Functione: District Work Find Work Fi	CO Created by:	On: 00/00/00	
Reason Code: C0 Type: Uvernale Aupraval Hules Functione Functione Functione Functione Final Quantum Force Account Final Quantum Final Quantum Contract Ant: D0.00 C0 Annount F0.00 C0 Annount F0.			
C0 Type: Uvernade Augenzved Hufers Functions: Functions: Time Adjustment Fina Wark Fina Wark			
CO Type: Uvernade Augenaved Hules Emergence Augenaved Hules Emergence Augenaved Hules Bid Contract Anat: 50.00 Functions: Verman/Underrur Force Account State Visit (State Visit State Vi	Reason Code:	*	
Functions: Overnur/Underrur Force Account Faita Wark Zens Dollar Time Adjustment Final Quantity	CO Type:	•	
Futo Wark Zeen Dollar Time Adjustment Final Quantity Contract Ant: 90.00 Clamourt 90.00	🔽 Overnde Approval Hules 🛛 🗍	Emergency Work	
Time Adjustment Final Quantity Di Amount \$000 Di Amount \$000		Contract Amt: \$0.00	
- Reference to:		t Contract Amt: \$0.00	
		CD Amount: \$0.00	
· · · · · · · · · · · · · · · · · · ·			
		Server System SMAD	MIN cn98

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 Items Folder

Change Order Item Tab

Required	Fields:
Contract ID: CO Nbr:	System(key) System(key)
Change Order Item Description:	FDOT
This Change Order:	FDOT

With this tab you will either add or alter quantities and/or prices for existing pay items on the contract. The following steps should be followed to work with existing items.

- 1. Don't forget the first step is to select New Change Order Item from the Services Menu.
- 2. You cannot zero out an item in a change order. Therefore, if you have an item which needs to be considered a "no cost" change, you must zero out the original item and add a new change order item, using the New Contract Item folder tab, to the contract. Use the same item code, description, quantity and price for the item you are changing. You will have to include reasons for both of these items in the Line Item Explanations.

Ele Edit Services Window Help Image: Change Order Items Image: Contract Item New Contract Item Cont ID: 20006 CO Nbr: D02 Project Nbr: Line Item Nbr: Item Code: Image: Change Order Item Descriptions: Unit: Unit Price: Image: Contract Bid: 0000 Change Order Item Description: Image: Contract Bid: 0000 This item is sub-contracted Approved Change Order: 0000 \$0.000 Force Account Item Pending Change Order: 0000 \$0.000 This Change Order:	AASHTO SiteManager				
Change Order Item Change Order Item New Contract Item Cont ID: 20006 CO Nbr: 002 Project Nbr: Line Item Code: Unit: Unit: Unit Price: Item and Supplemental Descriptions: Change Order Item Description: Quantity Amount Contract Bid: 0.000 Amount Contract Bid: 0.000 Current Contract: 0.000 S0.00 Pending Change Order: 0.000 S0.00	<u>File E</u> dit <u>S</u> ervices <u>W</u> indow <u>H</u>	<u>l</u> elp			
Change Order Item New Contract Item Cont ID: 20006 CO Nbr: 002 Project Nbr: Line Item Nbr: Item Code:	🔟 🕌 🗣 😤 🗅 🖨 🏔	2 🖬 🖓			
Cont ID: 20006 CO Nbr: 002 Project Nbr: Line Item Nbr: Item Code:	🛎 Change Order Items				
Line Item Nbr: Item Code: Unit Price: Item and Supplemental Descriptions: Change Order Item Description: Quantity Amount Contract Bid: 0.000 Current Contract: 0.000 Pending Change Order: 0.000 Supplemental Dide: 0.000 Supplemental Current Contract: 0.000 Supplemental Current Contract Supplemental Current Current Contract Supplemental Current Current Contract Supplemental Current	Change Order Item N	ew Contract Item			
Unit Unit Price: Item and Supplemental Descriptions: Change Order Item Description: Quantity Amount Contract Bid: 0.000 This item is sub-contracted Approved Change Order: 0.000 \$0.00 Pending Change Order: 0.000 \$0.00	Cont ID: 20006	CO Nbr:	002 Proje	ct Nbr:	
tem and Supplemental Descriptions: Change Order Item Description: Quantity Amount Contract Bid: 0000 Approved Change Order: 0000 Current Contract: 0000 Pending Change Order: 0000 \$000	Line Item Nbr: Iter	n Code:			
Change Order Item Description:	Unit:	Unit Price:			
Quantity Amount Contract Bid: 0.000 This item is sub-contracted Approved Change Order: 0.000 \$0.00 Current Contract: 0.000 \$0.00 Pending Change Order: 0.000 \$0.00	Item and Supplemental Desc	riptions:			
Quantity Amount Contract Bid: 0.000 This item is sub-contracted Approved Change Order: 0.000 \$0.00 Current Contract: 0.000 \$0.00 Pending Change Order: 0.000 \$0.00					
Quantity Amount Contract Bid: 0.000 This item is sub-contracted Approved Change Order: 0.000 \$0.00 Current Contract: 0.000 \$0.00 Pending Change Order: 0.000 \$0.00					
Contract Bid: 0.000 This item is sub-contracted Approved Change Order: 0.000	Change Order Item Descripti	on:			
Contract Bid: 0.000 This item is sub-contracted Approved Change Order: 0.000					
Approved Change Order: 0.000 Current Contract: 0.000 \$0.00 Pending Change Order: 0.000 \$0.00		Quantity	Amount		
Current Contract: 0.000 \$0.00 Pending Change Order: 0.000 \$0.00	Contract Bid:	0.000		This item is sub-contracted	
Pending Change Order: 0.000 \$0.00	Approved Change Order:	0.000			
This Change Order: 0.000 Force Account Item		0.000	\$0.00		
	Current Contract:				
	Current Contract:	0.000		Force Account Item	
	Current Contract:	0.000		Force Account Item	
	Current Contract:	0.000		Force Account Item	

- 3. Change Order Item Description: This is the description that shows up on the explanations window, if you do not enter something here the explanations window will just have the item and line numbers for each change order item with no description.
- 4. This Change Order Quantity: The quantity of the change, not the new plan quantity as it was in the past. Enter underruns as negative amounts.
- 5. Click on the Save icon to save the information.

New Contract Item Tab	New	Contract	ltem	Tab
-----------------------	-----	----------	------	-----

Required	Fields:
Contract ID:	System(key)
Change Order Nbr:	System(key)
Line Item Number:	System
Category Number:	System
Project Nbr:	System
Item Code:	System
Unit Price:	System

With this tab, you will be able to add items to the contract that does not already exist as part of the contract. Remember that any item added to the contract must be a valid item from the Master Pay Item List. We are not able to create pseudo numbers for contract changes as we currently do in CRS. Contingent items and other miscellaneous items will be added to the Master Pay Item list to accommodate where an existing item doesn't work.

Select **New** icon from the toolbar and then select **New Contract Item** tab.

- 1. Line Item Nbr: These must be unique numbers for the contract. You should review the existing Line Item Numbers. The sorting of the contract items on the Estimate Summary is dependent upon the Line Item Numbers used. If you wish it to be directly underneath a certain contract item then the Line Item Number should be one greater than that of the existing contract item. Note: The FDOT required length for the Line Item Number is 4 digits.
- 2. Project Nbr: The project number that the new item applies to.
- 3. Item Code: If you already know the item number you want to add then you can type it in this field or you can use the search lens to locate the appropriate item from the Master Pay Item list.

<u>File Edit S</u> ervices <u>W</u> indow <u>H</u> elp
🔟 🛐 🗣 🕱 🗅 🛩 🛎 🖄 🔛 🖵
🚟 Change Order Items
Change Order Item New Contract Item
Contract ID: 20006 Change Order Nbr: 002
Line Item Nbr: Category Nbr: Project Nbr: 🔽
Item Code: Units Type: Spec Year:
Description:
Major Item: 🔲 Specialty: 🗐 Status Type:
Unit Price: \$.00000
Proposal Line Nbr: Related Item:
Critical: 🔲 Pay Plan Qty: 🔲
Supplemental Descriptions:

- 4. Major Item, Specialty (not used): Check if they apply.
- 5. Unit Price: Unit price for the item.
- 6. Related Item: This list is not populated so this field will not be used at this time.
- 7. Critical: Check if this is a critical item.
- 8. Pay Plan Qty: If this box is checked it will not be possible to overrun this item above this Change Order amount.

🚾 AASHTO SiteManager

- 9. Supplemental Descriptions: Short description for the item.
- 10. Category Number: This is how funding is assigned to the items added by this Change Order. Use the drop down menu to select the proper a Category Number.
- 11. Now go back to the Change Order Item tab and enter this for this new item in the This Change Order field under Quantity.
- 12. Press the Save icon to save the information.

Change Order Time Adjustments

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

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

Florida Department of Transportation Trns*port SiteManager Function

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.

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. Change Order Management

Change Order Time Adjust	🦉 🖬 ments		
	Contract ID: 20006	Change Orde	r Nbr: 002
	Adjusted Adjust Contract or Day Milestone	nent Adjustment s Date	Explanation
	00	00/00/00	
		6	
	Time Adjustment Da		ted Completion Date: 00/00/00
	Explanation:		<u>×</u>

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

User's Handbook

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

Change Order Explanations

As was discussed earlier, SiteManager does not provide a means to enter all of the information related to a contract change that FDOT currently requires to be entered into our Contract Change Tracking System. Until we have these features added to SiteManager, we will continue to enter information in our Contract Change Tracking System for all contract changes done in SiteManager.

However, SiteManager does provide a

F

means to enter explanations for contract changes that can be used for documenting any information that should be included as part of the actual Contract Change documentation. These explanations can be made at the Change Order level, at the Change Order Item level or applied to all Change Order Items. Explanations can be chosen from a list of standard explanations from a menu or you can type your own code and explanation that will be saved for use on other Change Orders.

The following are brief instructions on how to enter these explanations if you wish to use this function.

- Change Order explanations should be assigned to specific line items. (<u>Hint:</u> from the drop down list, select "Explanations Applied to Specific Items"). An explanation to a specific line item must be associated with an item before it can be saved with a sequence number.
- **2.** The explanation must begin with the following: Sequence Number Overrun or Underrun: Reason. For example: Seq. No. 1 Overrun: Begin typing the reason....

Florida Department of Transportation Trns*port SiteManager Function

User's Handbook

3. If you have a new item on your change order, place the "Settlement of Costs" statement at the beginning of the reason, immediately following the item description. For example: Seq. No. 1 -Overrun: Settlement of Costs based on the agreed price of \$10.00 per Linear Foot. Begin typing the reason....

Change Order Tracking

SiteManager provides a method to have Change Orders either reviewed on line as well as approved on line by other SiteManager users. This function allows you to track the current status of any Change Order, which you have authority to see.

Upon entering this screen the Change Order Header tab will be displayed. The second tab on the window will display current information related to status of either the review or approval of Change Order.

On the CO Tracking List the following information is displayed.

- 1. Sent Date: This is the date that the Change Order was sent for action by user.
- 2. Name: The name of user that was requested to take action on Change Order.
- 3. Action: The action either requested for the Change Order by the user or the action completed by the user. If Change Order sent for Review then action would be Review and if for approval then the action would be Approval.
- 4. Date: Date the user enter action taken on the Change Order.
- 5. Recommendation: The recommendation that user gave either after review or approval. Recommendation could be Approved or Denied.
- 6. Remarks: Any comments that user made during their review and/or approval.

<u>NOTE: This would be a good time to review all information that you have entered to</u> make sure it is correct before you start the approval process.

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

C0 Header C0 Tusking Lit Centerst ID: Filled CD Number: C0 Contract by: Filled CD Number: C0 Contract by: Filled D0 Ref. C0 Contract by: Filled Filled C0 Transmittion Filled Filled C0 Transmittion Filled Filled C0 Transmittion Filled Filled Filled Filled Filled	Tracking	_ioix
CO Created by Exerners: Voirs Cost Biological Cost Biological Cost Biolog		
Balance (Recovered Level (PACEFROIC) Beausen Code: [Search Level (PACEFROIC) Beausen Code: [Search Level (PACEFROIC) Code	Contract ID: KIFEE CD Number: (001 Tentative Verbal Approval Dates - Federal: (20/00/00 Local: (20/00/00	
Balance (Recovered Level (PACEFROIC) Beausen Code: [Search Level (PACEFROIC) Beausen Code: [Search Level (PACEFROIC) Code	CO Created by: Excence, Vivian Dec 05/03/05	
Brasson Cole Specification conditionary Supplier and Flates Transitions Orientick Approval Flates Transitions Orientick Approval Flates Transitions Transite Transite Transite Transitions		
CO Type: FlagBornet# Agreement CO Consult Agreement Trainer Functionary Consult Agreement Trainer Consult Agreement Trainer Agreement Traine Adjustment Print Grandt Agreement Traine Adjustment Print Grandt Agreement Co Annuel Traine		
Constantion Approval Hades Constantiate Approval Hades Constantiate Approval Hades Constantiate Approval Hades Constant Anti 19439227436 Constant Anti 1943927436 Constant Anti 19439 Constant Anti 19439		
r Ventioner Time Adjustment Prind Gaussier Prind Gaussier P		
Extra Value Zeno Dotton Tene Adjustment Trind Quantity Pleterence Co.		
P Reference for	Current Contract Ant: 14.502.274.04	
	P Reference to:	
	Dispute: Force Account	

AASHTO Si	eManager				
∃ile <u>W</u> indow <u>I</u>	<u>+</u> elp				
🔟 🕌 🃭 f	2 🛋 🏝 👘				
🛎 Tracking					
CO Head	er CO Trac	cking List			
Contract ID:	20006	Change Order NI	or: 002		
Sent Date	Name	Action D	ate Recom- mendation	Remarks	
4					Þ

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 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.

Deleting a Change Order

To **delete a Change Order** the explanations and items must be deleted before the header information can be deleted. A Change Order, which has been approved, cannot be deleted.

Saving a PSR

SiteManager updates the header information of reports each time an estimate is ran. SiteManager **does not automatically save** a report when you close it. So if you generate a report on a certain date and do not save it, the next time that you generate that report the header information will be for the date that it is generated. **Conclusion:** If you want a Change Order, Estimate Summary to Contractor or any other SiteManager report to have the header information reflect the contract status at the time the report was first made correctly you **must save the report as a PSR** (previously saved report). If this is done the header will correctly reflect the contract information at the time of the report.

AASHTO SiteManager

Change Order Example – No Additional Cost Change Order

To enter a Zero Dollar Change Order that deletes one item and replaces it with another item you will need to have 2 Change Order Items. The first item will be to zero out the quantities on the existing item and the second CO Item will be to add the new item, with the same quantity and the same unit price. To do this you must first enter the CO Header Information as described in the instructions above.

From the CO Header window menu select Services –CO Items. This will display the Change Order Items window shown on the right.

🎟 📲 🗣 😤 🗅 🖨 🋎				
🛎 Change Order Items				
Change Order Item N	lew Contract Item]		
Cont ID: 20006	CO Nbr:	004 Project	t Nbr:	
Line Item Nbr: 📃 Ite	m Code:			
Unit:	Unit Price:			
Item and Supplemental Desc	riptions:			
tom and cappionondi bood				
	-			
Change Order Item Descripti	-			
	on:			
	-	Amount		
	on:	Amount		
Change Order Item Descripti	on: Quantity	Amount		
Change Order Item Descripti Contract Bid:	on: Quantity	Amount \$0.00		
Change Order Item Descripti Contract Bid: Approved Change Order:	on: Quantity 0.000 0.000			
Change Order Item Descripti Contract Bid: Approved Change Order: Current Contract:	0n: Quantity 0.000 0.000 0.000	\$0.00	Force Account I	tem

The first tab, Change Order Items on this window should be highlighted if it is not, then just click your mouse on the tab and it will be selected.

Once the first tab has been selected, from the menu, select Services New CO Item. You will be presented a list of pay items that exist on the contract. Select the one that you wish to zero and when it has been highlighted you can either double click your mouse or press OK. This will move the information to the upper portion of the Change Order Items window under the Change Order Items tab.

Select Contract Ite	ems			
Selection Contract Items				
Contract Items Project Nbr	ltem Nbr	Item Code	Description	
72040-8377	0100	0101 1	MOBILIZATION	
72040-8377	0400	0331 2	ASPH CONC TYPE S	
/2040-8377	0500	0700 40 1	SIGN SINGLE POST	(LESS THAN
72040-8377	0600	0711 6 61	TRAFFIC STRIPE SOLID	THERMOPLASTI
•		OK Cancel	1	× <u></u> }

Florida Department of Transportation Trns*port SiteManager Function

_Now you can enter the information on the lower portion of the screen to complete this new CO Item.

Enter a *Change Order Item Description* such as "Item removed to reflect new specifications". Enter the quantity of the item that is represented by this change. In our example, we have 18 as the *Current Contract* quantity, which is the same as the *Contract Bid* quantity. In our example – 18.000 has been entered as the *This Change Order* quantity. This will have the effect of zeroing out this quantity.

Once this has been entered click the Save icon on the toolbar or use File Save from the menu.

You've just entered the first of two CO items for this change order. <u>Note</u>: The screen displays all information related to the item that we were just working with. To add the second CO Item, the new item to replace the one we've just zeroed out, click on the New icon or from the menu select File New. This will blank out all information on the Change Order Item tab. When you have added this new CO item, click on the New Contract Items tab. The screen shown to the lower right will be displayed.

Information you need to have on hand in order to be ready to add a new item is:

- 1. Project Nbr: This is the FDOT Financial Project ID for which the item is to be added. The dropdown menu on the screen will only show those Financial Project ID's for the contract selected on which you are adding this Change Order. In our example the project number is 72040-8377.
- 2. Category Nbr: This is the grouping of pay items where this item will be located. One source for this information is from the Item Quantity Report (All Statuses) from the Contract Administration Reports panel. Since the old item was in category 200 Signing and Markings we've selected that for our example.
- 3. Line Item Nbr: This is the unique number that will be assigned to the pay item that is being added. This number designates the sort order where the pay item will be displayed in the estimates report as well as other listings of pay item numbers in SiteManager. From the same report as described in item 2 above, you could find the line item number for the item that this one relates to and use a number that would make it follow that item. From this report we find that the line item number for the item deleted was 0500 we've made ours to be 0505 so that it will always be located next to the one we deleted.

AASHTO SiteManager File Edit Services Window Help 🔟 🕌 🕼 😤 🗅 🖨 🌦 🧾 🤉 - 🗆 × 🚜 Change Order Items Change Order Item New Contract Item Cont ID: 20006 CO Nbr: 004 Project Nbr: 72040-8377 Line Item Nbr: 0500 Item Code: 0700 40 1 Unit: ASSEMBLY Unit Price: \$230.00000 Item and Supplemental Descriptions: SIGN SINGLE POST (LESS THAN 12) Change Order Item Description: Item Removed to Reflect New Specifications Amount Quantity Contract Bid: 18.000 \$4,140.00 0.000 \$0.00 Approved Change Order: Current Contract: \$4,140.00 Pending Change Order: 0.000 \$0.00 This Change Order: 18.000 \$-4,140.00 Force Account Iten AASHTO SiteManager - 🗆 × <u>File Edit S</u>ervices <u>W</u>indow <u>H</u>elp 🔟 🕌 🍁 😤 🗅 😂 🎒 🖶 💭 _ 🗆 × 🚢 Change Order Items Change Order Item New Contract Item Cont ID: 20006 CO Nbr: 004 Project Nbr: 72040-8377 Line Item Nbr: 0500 Item Code: 0700 40 1 Unit Price: \$230.00000 Unit: ASSEMBLY Item and Supplemental Descriptions: SIGN SINGLE POST (LESS THAN 12) Change Order Item Description: em Removed to Reflect New Specifications Quantity Amount 18.000 \$4,140.00 Contract Bid: 0.000 \$0.00 Approved Change Order: 18.000 \$4,140.00 Current Contract: Pending Change Order: \$0.00 This Change Order: -18.000 \$-4,140.00 Force Account Iter Ready Server PROD SMADMIN CN982JJ

Change Order Rem N	ew Contract Item				
Cont ID: 40002	CO Nbr:	002 Project	t Nbr.		
Construction and a second	a Code:				
10100 B	Jnit Price:				
tem and Supplemental Desc	iptions:				
				_	
				_	
Change Order Item Description	on:	11			
	Quantity	Amount		-	
Contract Bid:	0.000	Allouna			
Approved Change Order:	0.000				
Current Contract:	0.000	\$0.00			
Pending Change Order:	0.000	\$0.00			
This Change Order:	0.000		Force Account Item		
This change ofder. 1			Torce Account item		

- 4. Item Code: This is the FDOT pay item number you wish to add. Because the Department's standard pay item list is so large you would not want to take the time to display the entire list with Search lens while on this field. It is best to type the pay item number directly in this field. In our example we input 0700 40 2 as the Item Code.
- **5.** Unit Price: This is the appropriate unit price for the item being added. We set our unit price the same as the item deleted which was \$230.000.

All of the other fields are optional and not required to be used at this time.

Now that you have entered the information for the Item Code to be added as the second Change Order Item, you now need to go back to the Change Order Item tab to enter the quantity. In our example we've entered 18.000 to match the item that was deleted.

To save the changes click on the Save icon on the toolbar or use File Save from the menu.

🚢 AASHTO SiteManager				_ 🗆 2
<u>File E</u> dit <u>S</u> ervices <u>W</u> indow <u>H</u> elp				
] 🎟 📲 🗣 😤 🗅 📽 🚔 🤰				
🕌 Change Order Items				_ 🗆 ×
Change Order Item New C	Contract Item			
Contract ID: 20006	Change Order Nbr:	004		
Line Item Nbr: 0505	Category Nbr: 200	Project Nbr: 72	2040-8377 💌	[
Item Code: 0700 40 2	Units Type: ASSEN	IBLY Spec Year: 19	991	
Description: SIGN SINGL				
Major Item:	Specialty:	Status Type:		
Unit Price: \$230.00		, <u> </u>		
Proposal Line Nbr:	Related Item:	_		
Critical:	Pay Plan Qty: 🗖	_		
Supplemental Descriptions:				
L				
Deed		6		
Ready		Server	PROD SMADM	IIN CN982JJ

This page left blank intentionally.



Florida Department of Transportation

User's Handbook

VII.Stockpile Materials Function

Release 3.9b

January 2010

Stockpiled Materials: Getting Started

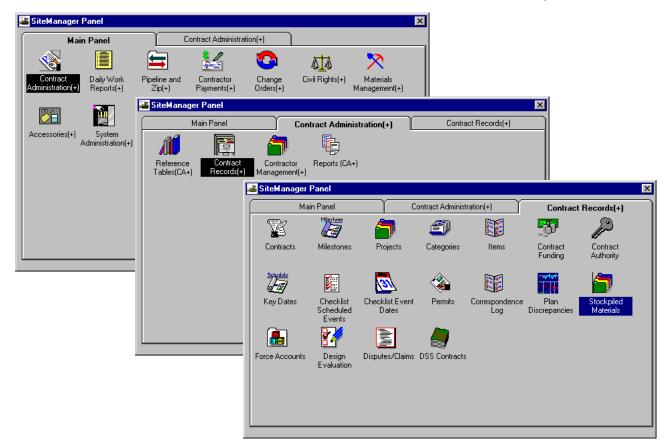
Required F	Fields:
Stockpiled Desc:	System
Invoice Number:	System
Quantity:	System
Units:	System
Unit Price:	System
Units:	System

So, you want to create some Stockpiled Materials? Here's a quick reference on what steps to take:

Note: The requirements for Partial Payment For Delivery Of Certain Materials as specified in Section 9-5 of the Standard Specifications and Section 3.6 of the Prep & Doc Manual shall remain in effect.

<u>Note:</u> This function is very difficult to employ on lump sum items, as well as lump sum and designbuild contracts due, primarily, to the difficulty in coming up with a proper conversion factor. It is recommended that these stockpiles be monitored outside SM and the adjustments manually entered.

From the Main Panel select Contract Administration then Contract Records then Stockpiled Materials.



Before adding any data, you must determine the following:

Which Line Items in the Contract include the invoiced material? It is possible to have various material components included on the invoice that affects separate Line Items in the Contract.

How much of the total invoiced material quantity to allocate to each item.

What the conversion factor for each Stockpiled Material should be. It needs to be determined how many units of the stockpiled item are in one unit of the line item. If the unit for the line item and the unit for the stockpiled material are the same, the conversion factor would equal one.

If an initial payment amount is due, which Contract Line Items pay this amount?

Getting Started

To get started, select your contract and item for the material. From the Services menu, select Choose Keys.

🚜 AASHTO SiteManager
File Edit Services Window Help
Stockpiled Materials
Contract ID: #0001 Project Nbr: f1234554321a Catg Nbr: [0100] Line ltm Nbr: [0010] Units: TON Unit Price: [100 Bid Quantity: [5000]
Item Description: ASPHALT PAVEMENT MISCELLANEOUS
Matl Code: Stockpiled Desc: Stockpile close-out test Status: Open
Invoice Date Invoice Number Quantity Units Unit Price [04/02/00 4 10.000 TON ▼ \$10.0000
194/02/00 4 10.000 TON _ \$10.0000 Conv Factor Conv Unit Price Invoice Amt Initial Invoice Payment Matl Sn Replenish Sn
1.00000 \$10.00000 \$100.0000 \$100.00
Remaining Qty Installed Qty To Date Paid To Date 10.000 000 \$.00

- 1. Matl Code: Will not be used at this time.
- 2. Stockpiled Desc: Must be entered manually.
- 3. Status: Populated automatically and means
- 4. Open = stockpiled material has been or is being added, but an estimate including this material has not been generated.
- 5. Active = stockpiled material has been locked by an estimate.
- 6. Closed = stockpiled material has been zeroed out.

- 7. Invoice Date: Enter the date of Invoice.
- 8. Invoice Number: Enter the Invoice Number.
- 9. Quantity: Enter the quantity of the material for the item the invoice represents.
- **10. Units:** Units of the Stockpiled Materials (ea, sf, cm, etc.). Select proper units from the drop down list.
- **11. Unit Price:** Invoice unit price, including tax. Calculate this amount: (total invoice amount of the item) x tax rate (if applicable) = X. X / total invoice units = Unit Price.
- **12. Conv Factor:** Must be calculated by the user. The user needs to determine how many units of the Stockpiled Material item is in one unit of the Contract Line Item. If the unit for the line item and the unit for the stockpiled material are the same, the conversion factor would equal one.
- **13. Conversion Unit Price:** Populated automatically and equals (Conversion Factor) x (Unit Price).
- 14. Invoice Amount: Populated automatically and equals (Quantity) x (Unit Price).
- **15. Initial Invoice Payment:** This is required and must be entered by the user. Enter the calculated initial payment for the stockpiled material. This will be the initial payment on the estimate. This payment must be equal to or less than the calculated Invoice Amount. We have seen problems when there is a difference between the two. All rules set forth in Section 9-5 governing partial payments will be complied with in calculating the initial payment.
- 16. Remaining Quantity: Populated automatically and equals (Quantity) (Installed Qty to Date).
- **17. Installed Qty to Date:** Populated automatically and equals (Paid Line Item Amount) x (Conversion Factor).
- **18. Paid To Date:** Appears to be the Stockpiled Materials Initial Payment. Once the estimate is generated, the Stockpiled Materials become active and the amounts are updated. The user cannot change any of the fields at this point. Once the estimate has been approved, the Stockpiled Materials associated with the estimate cannot be changed, other than to zero the quantity. Closing out a stockpile will be discussed below.
- **19. Material Sn:** Material sequence number assigned automatically to different materials added to the same pay item.

20. Replenish Sn: Replenishment sequence number assigned automatically when replenishments are made to an existing stockpile.

Replenishing a Stockpile

When additional material is delivered for use on the project payment for this material can be made by adding to (replenishing) an already created stockpile of the same material.

Follow these steps to replenish a stockpile:

- **1.** Go to the Stockpiled Materials screen.
- 2. Click on the Open icon.
- 3. Select the stockpile where the material is to be added.
- 4. Select the services menu.
- 5. Select Replenish Material. This will allow you to add additional materials that will appear as a new stockpile with an incremented Replenish Serial Number.

Closing Out Stockpile Material Balances:

If there is a remaining balance in a stockpile when the pay item is complete the stockpile must be manually closed out. When you manually close out a stockpile material balance, SiteManager zeros the remaining quantity and the remaining dollar value of the initial payment, if any.

Follow these steps to manually close out a stockpile:

- 1. Go to the Stockpiled Materials screen.
- 2. Click on the Open icon.
- 3. Select the stockpile or stockpiles that represent the completed pay item.
- 4. From the Services Menu, select Close Out Balance.

Payment Process For Stockpiled Materials

The stockpile created in the example below would show an Initial Payment of \$100.00 under Stockpiled Materials on the estimate summary if no payment is made toward the line item for which it was created.

If payment is made on the line item at the same time as the Initial Payment is made then the Stockpiled Materials payment will be reduced down by the amount of the stockpile represented by the line item.

i.e.: Item quantity payment of 2 tons(\$200.00) + \$100.00 Initial Payment for Stockpiled Materials *Less* pay down of stockpile of - \$10.00 (0.5 tons of stockpile per I ton of pay item = 1 ton(stockpile) X \$10.00 (Conversion Unit Price). Equals a net payment for the estimate of \$290.00

AASHTO SiteManager		
ile <u>E</u> dit <u>S</u> ervices <u>W</u> indow <u>H</u>	elp	
🎟 🕌 🗣 😤 🗅 😅 🛎	2	
Stockpiled Materials		
Contract ID: 40001 Units: TON	Project Nbr: 1234554321a Catg Nbr: Unit Price: 100 Bid Qua	
	· · · · · · · · · · · · · · · · · · ·	antity. 19000
Item Description: ASPHAL	T PAVEMENT MISCELLANEOUS	
Matl Code: Sto	ckpiled Desc: Stockpile close-out test	Status: Open
Invoice Date Invoice Nu	ımber Quantity Units	Unit Price
þ4/02/00 4	10.000 TON	▼ \$10.00000
Conv Factor Conv Unit P		
1.00000 \$10.00000	\$100.00000 \$100.00	2 0
	Qty To Date Paid To Date	
10.000	\$.00	

All future line item payments will reduce the Initial Payment for Stockpiled Materials in accordance with the conversion factor used until pay quantities exceed the remaining balance shown for that stockpile.

SPECIAL PROBLEMS RELATED TO STOCKPILED MATERIALS

There are a couple of situations where the pay down feature creates an erroneous reduction in the stockpile initial payment.

Those are:

- 1. The contractor installs material on the job from off project sources in the same pay period without drawing from the existing stockpile. Example: There is an existing stockpile for 1,000 LF of guardrail but the contractor places 100 LF of newly ordered guardrail.
- 2. The contractor stockpiles material for part of a pay item then constructs other parts of the pay item in the same pay period. Example: The contractor stockpiles mast arms for traffic signals and has his subcontractor install footings at the same time.

When these situations occur, the only option is to create an additional stockpile that represents the dollar value of the installed work that did not come from existing stockpiles.

The additional stockpile should be done as a replenishment to the stockpile that you do not wish to draw from.

The amount of the stockpile initial payment on the replenishment should be equal to the amount that would be drawn from the stockpile by the quantity you wish to pay for on the estimate. Consider the invoice price and the conversion factor in calculating what the reduction would be

This will allow stockpiles to remain at their full value until material installed is actually drawn from any real stockpile.

This page left blank intentionally.



Florida Department of Transportation

User's Handbook

VIII. Checklist Scheduled Events and Dates

Release 3.9b

January 2010

This section is not currently used by FDOT. The Value Added project features are now tracked in the Contract Information and Monitoring (CIM) system located on the Infonet under the Enterprise Applications portal. The instructions to use the Value Added portion of CIM are located on the CIM page under HELP\VAF User Guide.

Key Dates



User's Handbook

Florida Department of Transportation

IX. Key Dates

Release 3.9b

January 2010

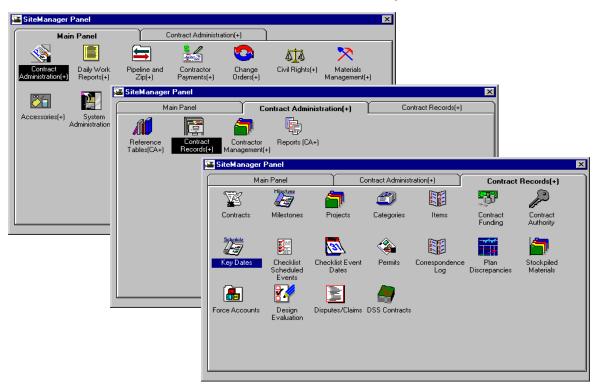
Key Dates: Getting Started

The **Key Dates** function contains additional important contract dates that are not included on the Critical Dates Tab covered in the Contracts Activation section of this manual. SiteManager will add a set of default Key Dates to each contract and others may be entered on an as-needed basis to fit the circumstances of the individual contract. Those dates that will not be needed may be deleted.

The default Key Dates are as follows:

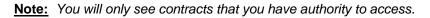
- 1. Time Began Date: The date of beginning of time charges.
- 2. Final Acceptance Date: The date of final acceptance of the contract work by FDOT.
- **3. Material Certification Date:** The date the Materials Certification is issued by the State Materials Office.
- 4. Offer of Final Payment Date: Date that the offer of final payment (or request for overpayment) was sent to the contractor.
- 5. Receipt of Offer of Final Payment: The date the offer of final payment (or request for refund of overpayment was received by the contractor.
- 6. Passed Date: The date that the contract was sent to the Comptroller for closeout.
- 7. Paid Off Date: The date the final payment on the contract was made.
- 8. Under Warranty: The date the warranty period begins until the projected end date.

To access the **Key Dates** function select the **Contracts Administration** icon on the **SiteManager Main** Panel then select the **Contract Records** icon then select the **Key Dates** icon.



NOTE: See Attachment "B" at end of this section for a list of the Key dates along with a description and the Office responsible for the entering of the dates.

Once selected, the following screen will appear. If you haven't selected a contract in some other window prior to opening this window, all of the fields will be blank. If the screen is blank (that is no keys have been selected) then select **File** from the **Menu** – then select **Open**. Locate the contract you want to work with and then press **OK**. You could also use the **Open** icon from the toolbar.



Required Fiel	ds:
Contract ID: Key Date Type: Projected Date: Required to Activate	System (key) System System
OR Required to Finalize Distribution list	FDOT
OR Recipient:	System
Message Text	FDOT

pe Proj D 00/00	ected Actual ate Date /00 00/00/00	Required Re to Activate to F N	quired inalize N	
00/00	200 00/00/200	N	N	
•				
	Recipient:			
		Equired I	Required to Activate	Required to Activate

To schedule a Key Date:

In the Key Dates list box, select the **Key Date Type** desired. In the **Projected Date** field, type the date the key date event is expected to be completed. Press the Tab key.

If this Key Date must occur before the Contract status can be changed to Active, click the **Required to Activate** check box. If this **Key Date** is to be part of the Contract finalization process, click the **Required to Finalize** check box. Press the Tab key.

In the **Distribution List** field, perform a Search and select a Group ID. OR in the **Recipient** field, perform a Search and select a User ID. Press the Tab key.

In the Message field, type a short notice that will be sent to the Distribution List or Recipient when the Actual Date is entered. Click the Save button. <u>NOTE</u>: When the projected date passes without the Actual Date being entered a message is sent to the Distribution List or Recipient entered when the projected date was entered.

<u>Tip</u>: The Key Date Type field cannot be modified on a saved record. To change the Key Date Type, delete the old record and add a new one.

To enter the Actual Date of a Key Date:

In the Key Dates list box, scroll to and click the Key Date. In the Actual Date field, with the cursor in the first space, type the date that the event occurred. Click the **Save** button.

To delete a Key Date:

In the Key Dates list box, scroll to and click the Key Date to delete. Click the Delete button. Click the Yes button (to confirm deletion). Click the **Save** button.

To Create A New Key Date:

On the Key Dates panel, click in the top area of the screen to place the focus in that area. Click the **New** button to insert a blank row in the top data window for the new Key Date.

In the Key Date Type drop-down list, click the expand arrow to the right of the current selection and select a Key Date Type you wish to add. Press the Tab key.

In the Projected Date field, with the cursor in the first space, type the date the key date event is expected to be completed. Press the Tab key.

If this Key Date must occur before the Contract status can be changed to Active, click the Required to Activate check box. If this Key Date is to be part of the Contract finalization process, click the Required to Finalize check box. Press the Tab key.

In the Distribution List field, perform a Search and select a Group ID. OR in the Recipient field, perform a Search and select a User ID. Press the Tab key.

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

	WODT Work Order Date- Conversion contrs only Notice to Proceed date for contracts converted from CRS	Work Order Date- Conversion contrs only	WODT	KEYDATE
Project Administrator	Beginning of contract specified warranty period, normally same as Final Accepted Date	Under Warranty	UNWR	KEYDATE
PA/District Construction	Date time actually begins	Time Began Date	TMBG	KEYDATE
District Construction	Date the contract was terminated by FDOT	Contract Terminated	TERM	KEYDATE
District Final Estimates	Date acceptable letter of acceptance is received from contractor	Receipt of Offer of Final Payment	ROFP	KEYDATE
District Final Estimates	Date contract is passed to the OCC for final payment	Passed Date	PASS	KEYDATE
District Final Estimates	Date contract is paid off by OCC	Paid Off Date	PAID	KEYDATE
PA/District Final Estimates	Date FDOT makes offer of Final payment or requests return of overpayment	Offer of Final Payment Date	OFP	KEYDATE
District/State Materials	Date Material certification is issued	Material Certification Date	MATC	KEYDATE
PA/District Construction	Date all cotract work is accepted by FDOT	Final Acceptance Date	FNLA	KEYDATE
PA/District Construction	Date all other contract work is accepted except specific pay items allowed by specs	Conditional Accepted Date	CNDA	KEYDATE
Responsible Party	Definition	Code Description	CODE ID	Data Type

Attachment "B" Key Dates

This page left blank intentionally.



Florida Department of Transportation

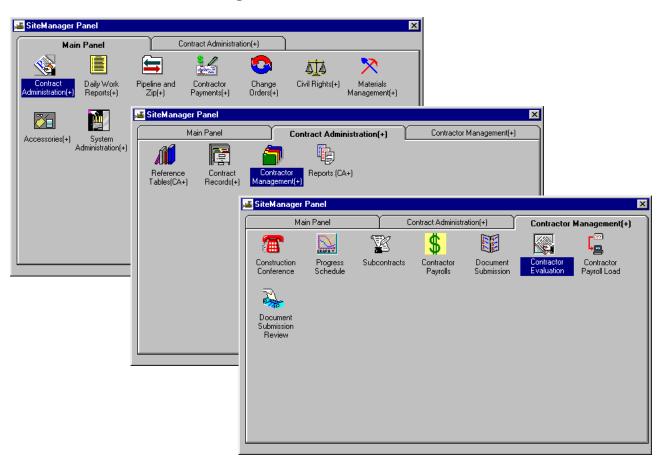
User's Handbook

X. Contractor Evaluation

Release 3.9b

January 2010

Contractor Evaluation Getting Started



To enter a contractor grade from the Main Panel select the **Contract Administration** panel. Select the **Contractor Management** panel. Next select the **Contractor Evaluation** panel.

Required	Fields:
Contract ID:	System(key)
Evaluation Date:	System
Contractor:	System
Rating:	System
Begin Date:	System
End Date:	System

enter a grade on. Once you highlight the contract, press the **OK** button. The screen to the right will be displayed.

The **Evaluation Date** is automatically populated with the current date but can be changed to whatever the date was when the evaluation was done.

As you enter in a field at the bottom of

a screen and tab off of it, the

If the **Contract ID** has not been selected, the screen shown below will be displayed.

Use the arrow on the right to scroll down to the contract you want to

Contract List Selection 合_Contract ID						
Find : Contract ID Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvi 2	L\▲
17680	VF592779309001	MAF-117-1(13)	PEND	53	03	
18231	VF99999999999	None	ACTV	15	07	
18744	VF596081070001	SE-2797(8)	ACTV	72	02	M/
20000	C002439008	N/A	PEND	99	99	
20001	C007597508	N/A	PEND	99	99	
20002	C033074008	1234567	ACTV	93	08	
۱	()K Cancel				• •

Florida Department of Transportation Trns*port SiteManager

User's Handbook

information will be automatically displayed at the top portion of the window.

Select the **Contractor** for whom you are doing the grade by using the drop down list. After selecting the appropriate contractor, press the tab key to go to the **Rating** field. Enter in the appropriate grade. Make sure the grade is a whole number and not following the decimal point.

The **Evaluator** field will be automatically populated with the name of the person who is logged on to SiteManager.

The **Reference Document** field will not be used by FDOT at this time.

🛋 AASHTO S	teManager						_ 8 ×
<u>File Edit Ser</u>	ices <u>W</u> indow <u>H</u> elp						
🔳 🕌 📭	👔 🗅 🚅 🖆 🧕 🖬 💭 📖 🗌						
Contracto	Evaluation						- 🗆 ×
Contract ID:	17680						
Contract ID.	117000						
Vendor ID	Contractor	Bating	Evaluation Date	Evaluator			
			11/20/00	Kathy Lovett			
•					•		
Evaluation [ate: 11/20/00 Contractor:		•	Rating: 0			
	ator: Kathy Lovett		Reference Doc		-		
-Evaluatio			-	ament, j	-		
	Date: 00/00/00 End Date: 00/	00/00	Contract Eval	uated Ind:			
		_	<u> </u>				
Work Descr	ption:						
·							
Deede				6		CHAPMIN .	

The **Evaluation Period Begin Date** should be entered in month day year format and the **Begin Date** should be less than the **End Date**. These are required fields.

The **Contract Evaluated Ind.** box indicates that the evaluation is for the entire contract period (the begin and end dates are still required).

The **Work Description** field should describe the work for which the contractor is being evaluated.

Save the information by using either the File - Save command or the Save icon on the toolbar.

To add another evaluation for a different period place the focus on the upper portion of the window and press the new icon to add a new row. Next place the focus back on the lower portion of the window and enter in the fields as described above.

This page left blank intentionally.



Florida Department of Transportation

User's Handbook

XI. Master List Maintenance Function

Release 3.9b

January 2010

Daily Work Reports Vendor Master List

This function allows us to maintain master list for each of our vendors (contractors, subcontractors) in a way that makes them available to any contract and all inspectors reporting on that contract. No longer will an inspector have to maintain their own master list and create one each time they get a new contract or contractor.

There are two separate functions for maintaining master list. The first function is maintaining a master list for a specific contractor and the second function is maintaining the master list for a specific contract.

Function 1 – Maintaining Vendor Master List

From the **SiteManager Main** panel double click the **Daily Work reports** icon and then double click the **Reference Table (DWR)** and then double click on the **Vendor Master List** icon.

🖾 SiteManager Panel
Main Panel Daily Work Reports(+)
Image: Contract Administration(+) Daily Work Reports(+) Contractor Daily Work Orders(+) Contractor Change Accessories(+) System Administration(+)
SiteManager Panel
Main Panel Daily Work Reports(+) Reference Tables(DWR+) Daily Work Diary History Process List Reports Fables(DWR+)
SiteManager Panel
Main Panel Daily Work Reports(+) Reference Tables(DWR+)
This will display the vendor pick list as shown at right. On the vendor pick list, locate the

On the vendor pick list, locate the vendor you wish to work with and double click on the highlighted row or highlight the row and click **OK**.

合Vendor			
ind :			
vendor			
Vendor Id	Vendor Short Name	Vendor Type	-
000396008	ABCO INDUSTRIAL PAINTING	Construction Contractor	
000418008	AMERICAN DISTRICT TELEGRAPH COMPANY	Construction Contractor	
000426608	A.L.A.D. CONSTRUCTION CO	Construction Contractor	1
000702108	AARON FENCE COMPANY	Construction Contractor	1
002081008	AIMEE CONSTRUCTION COMPANY, INC.	Construction Contractor	
	AIRPORT MARKINGS, INC.	Construction Contractor	1
002316008	AITI OTT MAININGS, INC.		
	AJAX CONSTRUCTION INC.	Construction Contractor	

Once you have selected a vendor, the screen on the right will be displayed. Note that a "**radio button**" is shown for each of the following types of resources: Equipment, Personnel, Supervisor, Staff Member. Alternately clicking on each of these "**radio buttons**" will change the lower portion of the screen.

Adding Supervisors

- 1. Make sure the **Supervisor** "radio button" is checked.
- 2. Click mouse in the lower portion of the window to ensure that it has the focus.
- 3. Press the **New** icon (looks like a sheet of paper) on the toolbar. This will add a blank line in the lower portion of the window.
- 4. Fill in the **Supervisor Name** field. This can be an actual name or generic reference to a position called supervisor.
- 5. Click on the Active Indicator to indicate that this supervisor is currently active and should be available to the contract.
- 6. Repeat steps 3 through 6 for as many supervisors you wish to add for all contractors.

Adding F	Personnel
----------	-----------

- 1. Make sure the **Personnel** button is checked.
- 2. Click mouse in the lower portion of the window to ensure that it has the focus.
- **3.** Press the **New** icon on the toolbar. This will add a blank line in the lower portion of the window.
- 4. Fill in the Personnel Type field. This can be an actual name or a generic reference to a type of personnel. Suggestions for types are Skilled, Semi-Skilled, Laborer, and Trainee. If you have some of these that work half day in addition to the full day then the types will need to be specific to these hours. In lieu of those

AASHTO SiteManager			- 🗆 🗵
<u>File Edit Services Window H</u> elp			
] 🎟 👫 😤 🗅 🗀 🇀 🔰 🖬			
Mendor Master List			- 🗆 🗵
	CONSTRUCTION CO	-	
,,			_
C Equipment C Personnel (Supervisor (O Staff Member	
Supervisor Name	Active Indicator		
Field Engineer			
Foreman #1			
Foreman #2			
Foreman #3			
General Foreman #1			
General Foreman #2			
General Foreman #3			
Geotech Eng			
Precast Bed Foreman # 1			
Precast Bed Foreman # 2			
Ready	Server 3.	0a SMADMIN	

■ AASHTO SiteManager File Edit Services Window Help	
C Equipment C Personnel C	C Supervisor C Staff Member
Boat Captains	
Boat Captians	
Bridge Common	
Bridge Skilled	
Bridge-Common	
Bridge-common	
Bridge-semi skilled	
Bridge-skilled	
Bridge-trainee	
Common	
Ready	Server 3.0a SMADMIN [cn982]

mentioned above, you might want to include the following as your types Full Day, Skilled - Half Day, Skilled - Full Day Semi-Skilled, Half Day Semi-Skilled, etc.

- 5. Click on the Active Indicator to indicate that this personnel is currently active and should be available to the contract.
- 6. Repeat steps 3 through 5 for as many personnel you wish to add for all contractors.

Adding Equipment

- 1. Make sure the **Equipment** button is checked.
- 2. Click mouse in the lower portion of the window to ensure that it has the focus.
- 3. Press the **New** icon on the toolbar. This will add a blank line in the lower portion of the window.
- 4. Fill in the Equipment Description field. This can be reference to an actual piece of equipment or a generic reference to a type of equipment.
- 5. Fill in the Equipment ID with a unique identifier for the piece of equipment.
- 6. Click on the Active Indicator to indicate that this equipment is currently active and should be available to the contract.
- Repeat steps 3 through 6 for as many pieces of equipment you wish to add for all contractors.

Staff members not used

Note:

A generic master list can be set up after activating the contract but prior to reporting work on the job. This list could contain generic names such as Supervisor, Skilled Worker, Semi-skilled Worker, Roller, Dump Truck, etc. A dummy DWR and Diary (shown as a no charge day) must be set up to generate this list and for a date after contract activation. The DWR can later be copied (enter in new DWR date, press tab, and answer yes to copy contractor information) to a real DWR for use in generating an estimate.

Changing an Existing Item.

Why would we do it??????

Function 2 – Maintaining Contract Master List

From the Reference Table (DWR) panel as shown above, double click on the **Contract Master List** icon.

This will display the Contract Pick List as shown on the right.

AASHTO SiteManager - [Vendor Mast Eile Edit Services Window Help	ter List]		_0 _8
□ III: VF940519552004 GRANI	TE CONSTRUCTIO	N CO	
• Equipment C Personnel	C Supervisor	O S	taff Member
Equipment Description	Equipment ID	Active	
air compressor	AC2	V	
Air Compressor	Ac	V	
barge	B2	V	
boat	B2a		
Bulldozer	BD5	V	
Boom Truck	BT3	V	
Bulldozer	Bd	V	
Backhoe	Bh	V	
crane 4100	C2	V	
Ready	 Server 3	.0a CND:	3RPE cn982jj

nd :				_				
ontract ID								
Contract ID	Vendor ID	Fed State Proj Nbr	Status	County		Lvl 3	Lvi 4	
0000 0001	C002439008 C002439008	N/A N/A	PEND PEND	91 91	08			Construction Trainin Construction Trainin
1001	C002439008	N/A N/A	PEND	91	08			Construction Trainin
003	C002439008	N/A	PEND	91	08			Construction Trainin
1004	C002439008	N/A	PEND	91	08			Construction Trainin
1005	C002439008	N/A	PEND	91	08			Construction Trainin

Locate the contract you

	, a	Select Contract '	/endor					
	TO SiteMana	Selection						
	vices Windov	Contract ID		E3A03				
100 🛐	i 🗣 😤 🖻							
🚇 Cont	ract Master L	1						
		Find :						
Contra	act ID: E3A0	Vendor						
		C000396008	ABCO INDUSTRIA	L PAINTING (N	OT INC.)			
0 E	quipment	VF582262702003	STANDARD CONC	RETE PRODUCTS, I	NC.			
			APPLIED FOUNDA					
Ve	endor Master	VF940519552004	GRANITE CONSTR	RUCTION CO				
EqpIC								
ас	air compresso							
ас	Air Compress							
AC2	air compresso			OK Can	cel			
barge	barge							
barge	Barge				Bn	Backnoe		
bd	bulldozer					g boat, tug	<u> </u>	
Bd	Bulldozer				BT3	Boom Truck	<u> </u>	
BD5	Bulldozer			<u>A</u> dd ->		crane 4100		
boat	boat			Add All ->>	<u>C3</u>	Compressor	<u> </u>	
boat	Boat				C4	Crane		
C2	crane 4100			<- Re <u>m</u> ove	C5	Compressor		
C3a	Crane			<<- Rem All	C5a C5b	Crane 635C		
CB1	Concrete buc	kets			CB1	Crane 3900W Concrete bucket		
cc	crane, crawle	r			CEI	Office CEI Field Trailer		
Cc	Crawler Crane	,			conc v			
CEI	office CEI feil	d trailer	V		Cpt	Concrete Pump Truck		
CEI	office CEI fiel	d trailer	V			ny crane, hydraulic	J J	
CEI-offic	c∈CEI feild traile	r				(jorano, rijanatino		
					<u> </u>			
Ready						Server 3.0a	CND3RPE cn982jj	

want to work with and either double click on the highlighted row or once row is highlighted, click on the OK button.

This will display the next		
screen, shown on the right,	Select Contract Vendor	
the Vendor Pick List. This is	Contract ID E3403	
a list of all	Vendor	
contractors/subcontractors		
that have been indicated to		
work on the contract	Find :	
selected.	C000396008 ABCO INDUSTRIAL PAINTING (NOT INC.)	
	VF582262702003 STANDARD CONCRETE PRODUCTS, INC.	
Locate the vendor that you	VF593417167001 APPLIED FOUNDATION TESTING	
wish to work with and either	VF940519552004 GRANITE CONSTRUCTION CO	
double click on the		
highlighted row or press the		
OK button once you have		
highlighted the row.	OK Cancel	

This

This will display the window shown below.

Again, you'll see that you have the 4 resource types with a "radio button" next to each. As you click on each of the "radio buttons" the bottom portion of the screen will change. On the left side is the "Vendor Master List" as was maintained under Function 1 above and on the right side is the "Contract Vendor List" which shows all of the selected resource type that has been assigned to contract you selected earlier.

Adding a Resource to the Contract Vendor List

To add a resource to the Contract Vendor List, just locate the item on the left side of the screen that you wish to add and then click on the **Add** button.

Adding all Resources to the Contract Vendor List

To add for the selected type of resource, all of the vendor resources from the Vendor Master List, click on the Add All button.

	uipment C Personnel	O Supe	ervisor O S	taff Men	nber	
Ven	dor Master List:			Contrac	ct Vendor List:	
Eqp ID	Equipment Description	Active 🔺		Eqp ID	Equipment Description	Active_
ас (air compressor			Ac	Air Compressor	<u>.</u>
вс И	Air Compressor			B2	barge	N
AC2	air compressor			B2a	boat	
barge l	barge			bd	Bulldozer	<u>F</u>
barge I	Barge			Bh	Backhoe	<u> </u>
od I	bulldozer	V		boat, tug	boat, tug	<u> </u>
3d I	Bulldozer	V		BT3	Boom Truck	<u>.</u>
3D5 I	Bulldozer	V	Add ->	C2	crane 4100	<u> </u>
ooat I	boat	<u> </u>		C3	Compressor	<u> </u>
ooat I	Boat	- -	Add All ->>	C4	Crane	<u>F</u>
2	crane 4100		≺-Re <u>m</u> ove	C5	Compressor	F
	Crane		<<- Rem All	C5a	Crane 635C	F
	Concrete buckets			C5b	Crane 3900W	<u>F</u>
	crane, crawler			CB1	Concrete bucket	F
	Crawler Crane	▼ ▼		CEI	Office CEI Field Trailer	
	office CEI feild trailer	V V			concrete vibrator	
	office CEI field trailer	· ·		Cpt	Concrete Pump Truck	
	CEI feild trailer			crane, h	crane, hydraulic	

Removing a Resource from the Contract Vendor List

To remove a resource from the Contract Vendor List, locate the resource on the right side of the screen and then click on the **Remove** button

Removing all Resources from the Contract Vendor List

To remove all resources from the Contract Vendor List, click on the **Rem All** button.

This page left blank intentionally.



Florida Department of Transportation

User's Handbook

XII. Stand-Alone Function

Release 3.9b

January

2010

Stand-Alone Function Getting Started

This function provides us the means to move contract data information from the server database to our local database in order that we might be able to work offline not connected to the network database server. This mode of operation is called **"stand-alone"**. "Stand-alone" operation is necessary because it allows us to enter Daily Work Reports and compile Diaries while not connected to the network database server.

In order to use SiteManager in "stand-alone" mode you must move contract information from the network server database down to your local database stored on your computer's hard drive. Once you have entered data directly into the "stand-alone" version, you will need to move the added (or changed) data back to the network server. This is the role of the **Pipeline** function. We will not be using the Zip functionality at all.

Definitions

The following definitions will help clarify the use of these terms throughout this document.

- 1. **Stand-alone Mode** A mode of operation where user is accessing local database and not network database. This is identified at time of SiteManager logon.
- 2. Pipeline The process of moving data between the local database and the network database
- 3. *Inspector's Workstation* A computer workstation capable of being connected to FDOT network or running independent of the network
- 4. Basic Contract Data Includes all information about a contract including all Change Orders that have been approved.

Getting Contract Information Down to the "Project Manager's" Workstation.

In order to work in the "stand-alone" mode of operation you must have been assigned to the special group "CNOFFLIN" which identifies all users who can have this authority. Before you can work on any contract that you are entering dailies, diaries, you must move the basic contract data down to the local database on the Inspector's workstation. The following steps should be followed to do this.

- 1. Make sure Workstation is connected to the network and you are logged on correctly.
- 2. Start SiteManager using your Desktop icon.
- **3.** At SiteManager Logon screen make sure you select "Server" in the "Connect To:" box.

SiteManager Logon
Insport SiteManager Construction Management System
User ID: cn982jj
Password: *****
Connect to: Server
Logon Change Password Close
AASHT0 Trns-port, the AASHT0 Trns-port logo, Trns-port SiteManager, and the Trns-port SiteManager logo are registered trademarks of the American Association of State Highway and Transportation Officials Portions Copyright © 2000-2002 AASHT0, Portions Copyright © 1994-2002 Info Tech, Inc.
Enter the User Password.

Florida Department of Transportation Trns*port SiteManager **User's Handbook**

- 4. On the Main Panel, Double SiteManager Panel click on the Pipeline/Zip icon.
- 5. On the Pipeline and Zip Panel double click on the "Sever to PM Pipeline" icon.
- 6. If you haven't selected a contract previous to entering this screen you will need to perform either a File Open Command or File Open Icon once you enter the Server to PM Pipeline function. Locate the contract you wish to work with, highlight it and either double click your mouse or click on the OK button.
- 7. If you have previously selected a contract then the window below will open. If this isn't the contract you wish to work with then you can use either the File Open Icon or File Open Command from the menu and select your contract using the Contract Selection window. Locate the contract you wish to work with, highlight it and either double click your mouse or click on the OK button
- 8. The first tab in this window is the Pipeline Summary Tab This shows in summary fashion what items have been selected on the following tabs. The first time you pipe contract information for a contract you should ensure that the Basic Contract Button is checked. This will cause "All" to be shown in the Change Orders and Force Accounts text boxes. You can select Basic Contract Data anytime you pipe the contract data, this will ensure that all contract changes have been

PM to Server PM/Inspector's Pipeline and Zip Process List Load Information Pipeline

Main Panel

Daily Work Reports(+)

System Administration(+)

🛎 SiteManager Panel

Zinfa

Q

Manuals(+)

Main Panel

Contract Administration(+)

<u>~</u>

Accessories(+)

Contracts 合 Contract Find : Г Contract Contract ID Vendor ID Fed State Proj Nbr Status County Lvl 2 Lvl 3 Lvl 4 Local 86000299001 CMPL AI517-B1 orandum of A VE596000299001 N/A ACTV 61 393 AI565 VARIOUS ROADW CMPL VF596000435017 N/A 55 03 392 AI565-R1 VF596000435075 N/A ACTV 55 03 392 MOA WITH CITY O AI567 VF596002787001 N/A CMPL 46 03 391 City Of Springfield AI567-R1 VF596002787001 N/A ACTV 46 03 391 MOA for City of Spri OK Cancel

	Server To PM Pipeline Pipeline Summary	Diary Select	DWR Select	Change Order Select	Force Account Select	User Select
ASH Sei	Contract ID: E3403	Description:	HATHAWAY BRIDGE REPI	ACEMENT DESIGN/BUILD) PROJECT	
Pij Su ontr	☐ Basic Contract Da ☐ Materials	ata Diaries:	,	Orders: 0 counts: 0		
	PipeLine Status:					
eLin	ne Status:					

January 2010

Stand-Alone Function

<u>st</u>s

Civil Rights(+)

 \mathbf{x}

7

Materials

Management(+)

Pipeline and Zip(+)

[<mark>_</mark>]

2

Change Orders(+)

Pipeline and Zip(+)

1

2

Contractor

Payments(+)

downloaded to the Project Manager's workstation. You will also need to be on the Pipeline Summary Tab in order to start the download process.

9. The second tab is the Diary

Select Tab. Normally	an inspector	🛎 Server To PM P				_	
will have no need to m		Pipeline Sulamar	y D	iary Select	DWR Select	^Y Change Order Select	Force Accour
down to their workstati	on because	Contract ID: E3A03	3	Description: H/	ATHAWAY BRIDGE REPL	ACEMENT DESIGN/BUIL	D PROJECT
			Diaries Li	ist:			
AASHTO SiteMa					e Cred Reason Desc	Diary Locked Inc	d Est Nbr 🔺
<u>File</u> <u>S</u> ervices <u>W</u> inc	low <u>H</u> elp		07/30/04	.0 .0		N	0049
🔟 🖬 🕌 💵 😤	🗅 📂 🍅 👘		07/29/04	.0		N	0049
Server To PM F	lineline		07/27/04 07/26/04	.0 .0		N	0049 0049
Pipeline Summary	Diary Select		•				
	,		Selected	Diaries:			
Contract ID: E34	02	Add ->	Diary Date	e Credit Day Valu	e Cred Reason Desc	Diary Locked Inc	d Est Nbr
Contract ID. ESA	0.5	<- Remove					
	Diaries List:	(Hemore					
	Diary Date Credit D	<<- Rem All					
	01/31/02 .0					0010	
	01/30/02 .0			N		0018	
	01/29/02 .0			N		0018	
	01/28/02 .0			<u>N</u>		0018	
	01/27/02 .0			N		0018	
	•						
	Selected Diaries:	Server To PM F					
<u>A</u> dd ->	Diary Date Credit Da	Pipeline Summar	y (Diary Select	DWR Select	[*] Change Order Select	Force Accoun
Demons 1		Contract ID: E340	2	Description: H	ATHAWAY BRIDGE BEPI	ACEMENT DESIGN/BUIL	D PBOJECT
<- Re <u>m</u> ove		ounder 10 - jeu ior		b occupation: jr ii			
<<- Rem All			DWRs Li	ist:			
				User Name	D₩R Date	Locked Authorized Es	timate Nbr 🔺
			Conlon,Reb			N N	
			Bradford, D			N N	
Ready			Yates, Jose Yates, Jose		07/30/04 07/29/04	N Y 00 N Y 00	
a Diary is not created	or managed		Yates, Jose		07/28/04	N Y 00	
by the inspector in the			Selected				
			Jelected	User Name	Div/D Data	Locked Authorized Es	timate Mbr
you do, here you will n		Add ->		O SEL MAINE	Dwn Date	LUCKEU AUMUNIZEO ES	
existing Diaries that yo		<- Remove					
send back down to the	"Project						

the upper portion of window, select the Diaries that you want to download and then in the lower window press the "Add" button. You can use the Remove button to un-select any that you added by mistake. You could also use the Rem All button to remove all Diaries that you had selected. These removal actions only remove them from the list of Diaries to be downloaded. They still remain in the network database.

<<- Rem All

Manager's workstation for editing

or reviewing in the "stand-alone" In

10. The third tab is the DWR Select Tab. Here you will identify any existing DWRs that you wish to

send back down to your workstation for editing or reviewing in the "stand-alone" mode. In the upper portion of the window, select the DWRs that you want to download and then in the lower window press the "Add" button. You can use the Remove button to un-select any that you added by mistake. You could also use the Rem All button to remove all DWRs

Server To PM F	Pipeline					E
ipeline Summary	Diary Select	DWR Select	Change Order Select	Force Account Select	User Selec	t
Contract ID: E34	.03	Description:	HATHAWAY BR	IDGE REPLACEMENT	DESIGN/BL	
	D₩Rs List:				F	
		ser Name	DWR Date		Estimate Nbr	Ē
	Harmon, Joe		02/22/02	N		
	Harmon, Joe		02/21/02	N N		
	Harmon, Joe Harmon, Joe		02/20/02	N		
	Harmon, Joe		02/18/02	N		•
	Selected DWF	ls:		·		
<u>A</u> dd ->	Us	ser Name	DWR Date	Locked Indicator	Estimate Nbr	
<- Re <u>m</u> ove						

that you had selected. These removal actions only remove them from the list of DWRs to be downloaded. They still remain in the network database.

11. The fourth tab is the Change Order Select Tab. Here you will ide any Contract Change Orders that need to be downloaded. If you selected the Basic Contract Data button on the Pipeline Summary Tab, then you do not need to make any selection on this tab. If you wish to only download **Contract Changes Orders** that have been approved since the last download then this is the tab to do that. Highlight the Change Order that you want to download and press the "Add" button. If you added one by mistake you can remove highlighting in the lower portion of the window, the one to be removed and then click on

Jidei	🚢 Server To PM Pi	peline			
ntify	Pipeline Summary	Diary Select	DWR Select	Change Order Select	Force Accou
<u>File</u> <u>S</u> ervices	Contract ID: E3403		HATHAWAY BRIDGE REPL	ACEMENT DESIGN/BUILD	PROJECT 🗵
_ III 📲 🗣 🕯		Change Orders List:			
Server To F		Change Order Number	Chai	nge Order Description	<u></u>
Pipeline Summ		001	UNFORESEEN ADDITIONA	IL WORK	
<u> </u>		002	0040NN Design Standards<	Specification or Policy Chan	ge
Contract ID:		003	0090NN PERMIT RELATE	ISSUES	
		004	0040NN SPECIFICATION &	ANGE OCCURING AFTER	LETTING
		•			
		Selected Change Order	s:		
	Add ->	Change Order Number	Cha	nge Order Description	
	<- Remove				
	<<- Rem All				
<u>A</u> dd ->					
<- Remov					
<- nemov	<u> </u>				
<<- Rem #	u				
II					
Ready			Server	3.0a SMADMIN	Jon982ji

the "**Remove**" button. You could also click on the Rem All button to remove all from the list. This action only removes them from the list to be downloaded and not from the database.

Stand-Alone Function

- 12. The fifth tab is the Force Accou Select Tab. FDOT has no current plans to utilize Force Accounts within SiteManager so this tab will not be used.
- The sixth tab is the User Select Tab. This tab is not used currently because each inspector has their own laptop and users are not sharing laptops.
- 14. Select the Pipeline Summary Tab and then select the Services – Pipeline Data command on the menu line at the top of the screen. Messages will appear on the Pipeline Status line as to current process. If any DOS

int	Pipeline Summary		DWR Select	Change Order Select	Force Account Select	User Select
AASHTO SiteMar	Contract ID: E3403		HATHAWAY BRIDGE REF	PLACEMENT DESIGN/BUIL		
Server To PM Pipeline Summary		Force Accounts List: Force Account ID	Force Ac	count Description		
	Add -> <- Remove <<- Rem All	Selected Force Account Force Account ID		count Description		
<u>A</u> dd -> <- Re <u>m</u> ove	User ID		User Name			
<<- Rem A <u>I</u> I						

windows (they show results of file delete and zip process) remain open then close them. Once this process has completed, the message "Pipeline Complete" will appear in the Pipeline Status line.

Once you have piped any Diary or Daily Work Report down to your Workstation, these will be locked to changes made while on the network database. They will need to be piped back in before they're available for editing.

Working in "Stand-Alone" Mode.

Once you have performed the Pipeline function, you now can log into SiteManager and work with the contract information you downloaded from the SiteManager network database.

- 1. Double click on your SiteManager icon on the "Project Manager's" workstation.
- 2. Enter your Userid and password.
- 3. Before clicking on Enter, make sure that "Stand-Alone" has been selected in the "Connect to:" drop down box.
- 4. Click on Enter. This will take you to the SiteManager Main Panel. Note that the number of icons is less than when you were working in the "Server" mode. This is because you are limited to only working on Diaries, Dailies, and Viewing contract information. No other functions than these works in the "stand-alone" mode. Functions here work the same as they do while in the "Server" mode of operation. For help in those functions, please see other sections

SiteManager Logon
Ins port SiteManager Construction Management System
User ID: cn982jj
Password: ****
Connect to: Standalone
Logon Change Password Close
AASHTO Trns-port, the AASHTO Trns-port logo, Trns-port SiteManager, and the Trns-port SiteManager logo are registered trademarks of the American Association of State Highway and Transportation Officials Portions Copyright © 2000-2002 AASHTO, Portions Copyright © 1994-2002 Info Tech, Inc.
Enter the User Password.

within this user manual.

Moving Information Back to the Network Server.

While in the "stand-alone" mode you could have performed the following functions to either change data previously brought down from the network database or information that you have added since you last brought data down from the network database.

- Revised Daily Work Reports
- Revised Diaries
- Create Daily Work Reports
- Created Diaries

You must move any revised or created Diaries or Daily Work Reports back to the network database before the next estimate is run or they will not be included in that estimate. Normally an inspector will not be moving a Diary back up to the server. You should also move data back when you are completed with the contract and you should move data back as often as you can in order to have it backed up. Once you have indicated that a Daily Work Report has been moved back to the network server you will not be allowed to make any more change in the "stand-alone" mode to that Daily Work Report. In the event you need to make change after you have piped them back up to the network server, you will have to make the changes there.

The following provide instructions on how to send this data back up to the network database so that it can be used in the generation of estimates.

- 1. Using the "Project Manager's" workstation, log onto the FDOT network.
- 2. After successful connection, start SiteManager using the Desktop icon. Make sure you select "Server" as the "Connect To:"
- 3. Select the Pipeline/Zip icon, then the "PM to Sever Pipeline" icon.

SiteManager Panel	× I
Main Panel	Pipeline and Zip(+)
	🖹 🤽 💁 💵 📉
	eline and Contractor Change Civil Rights(+) Materials Cip(+) Payments(+) Orders(+) Management(+)
	SiteManager Panel
Accessories(+) System Mar	nuals(+) Main Panel Pipeline and Zip(+)
Administration(+)	
	Server to PM PM to Server Pipeline PM/Inspector's Pipeline and Zip Process List Load Information
ary 2010	

Florida Department of Transportation Trns*port SiteManager User's Handbook

Stand-Alone Function

Using either the **File Open** Icon or **File Open Command** select your contract. If you don't select the contract at this time you will be prompted to select it when you move to one of the other tabs

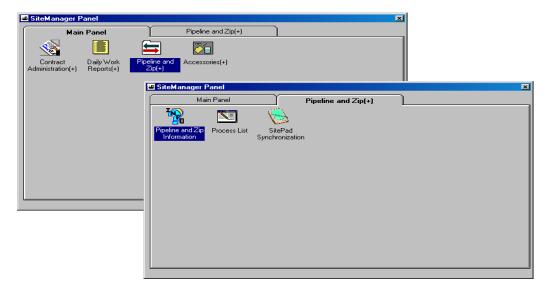
		r Selection	
		Contract	
		Find :	
		Contract	
		Contract ID Vendor ID Fed State Proj Nbr Status County Lvl 2 Lvl 3 Lvl 4 Local Al517 VF596000299001 N/A CMPL 61 03 393 City of Chipley	
		AI517 AASHTO SiteManager	
4.	The fir st tab in the PM to	Al56: Life Services Window Help Al56: The Services Window Help	
4.	Server Pipeline process is	Al567 Physical Physic	×
	the Pipeline Summary	Al567 FigeLine Summary Daty Select DWH Select Sample/ Text Select	
	Tab. As in the Server to	Contract ID: JE 3403 Description: JHATHAWAY BRIDGE REPLACEMENT DESIGN/BU	
	PM Pipeline process, this		
	provides summary	Diaries:	
	information on what is being		
	piped back to the network database. If you have		
	completed all work on this	Sample and Test:	
	contract, then you will want to		
	click on the Basic Contract	Check In Status:	e/Test Select
	Data button. This will remove		INT DESIGN/BL
	the contract from the "stand- alone" database and will mark	Ready Server 3.0a SMADMIN Jcm382ii r i+ DWRs List:	
	as "checked" back in on the ne		cator Estimate Nbr
-	AASHTO SiteManager		
5.	<u>File Services Window Help</u>		
	I III III III III III IIII IIII IIIIIII		
	PipeLine Summary Diary Select DWR Select	t Sample/Test Select Selected DWRs:	
	Contract ID: E3403 Description: HATHAWAY B	IRIDGE REPLACEMENT DESIGN/BL	cator Estimate Nbr
	Diaries List: Diary Date Credit Day Value Cred Reason Desc	< <u>File Services Window Help</u>	
		Ukay Locked ind Est Hor C PM To Server Pipeline	
		PipeLine Summary Diary Select DWR Select Sample/Test S	elect
	4	Contract ID: E3403 Description: HATHAWAY BRIDGE REPLACEMENT DE	SIGN/BL
	Selected Diaries: Add -> Diary Date Credit Day Value Cred Reason Desc	DWBs List:	
	<- Remove		
	< Rem All		
	Ready	Selected DWRs: Server 3:0:a [SMADMIN [on882] Add -> User Name DWR Date Locked Indicator Estim	ate Nbr
		<- Remove	
		< Rem Ajj	
		Ready Server 30a SMA	DMIN Jon982ii

- 6-7. The fourth tab is the **Sample/Test Select Tab**. At this time FDOT is not using the Materials Functionality so this tab will not be used.
- 7.8. Select the Pipeline Summary Tab and then select the Services Pipeline Data command on the menu line at top of screen. Messages will appear on the Pipeline Status line as to current process. If any DOS windows remain open then close them. Once process has completed, the message "Pipeline Complete" will appear in the Pipeline Status line.

Getting information on what has been Piped to Inspector's Workstation

SiteManager provides information on what data has been transferred between the network server database and the database installed on the Inspector's workstation.

- 1. Start SiteManager by using your desktop icon. Log onto SiteManager making sure that you have "server" selected in the **Connect To**: drop down menu.
- 2. From the SiteManager Main Panel, select and double click on the Pipeline/Zip icon.
- 3. On the Pipeline/Zip Menu Panel select and double click the Pipeline/Zip Information icon. This will



display the Pipeline And Zip information window.

4. The first tab in the **Pipeline And Zip Information** window is the **Samples Tab**. At this time FDOT is not using SiteManager Materials Functionality so this tab will not be used.

- 5. The second tab is the Contract Tab. If you haven't selected a Contract ID prior to opening this window you will be presented a list of contracts that you have access to. Locate and highlight the contract you want to see information on. Either double click on the highlighted contract or press the OK Button. This will populate the Contract Tab as shown. The following define the column headings on the screen.
 - a. Check Out User ID the unique identifier of the user who checked out the contract selected. Check Out is the act of transferring data from the network server database down to the Project Manager's
 - workstation database.
 b. Check Out Date the date on which the contract information was checked out.
 - c. Check Out Time the time at which the contract information was checked out.
 - d. Check In User ID the unique identifier of the user who checked in the contract information from the Project Manager's workstation database back to the network server database.

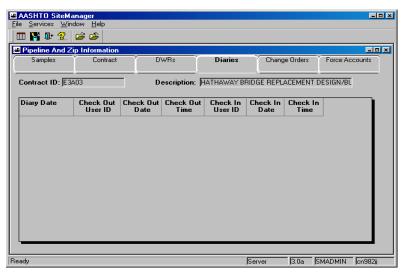
Samples	Contract	DWRs	Diaries	(Change	e Orders	Force Accounts
ntract ID: E3A03		Descrip	otion: HATHAWAY	BRIDGE REPLA	CEMENT DE	ESIGN/BL
Check Out User ID	Check Out Date	Check Out Time	Check In User ID	Check In Date	Check In Time	·
n306bt	10/06/01	11:18		00/00/00	00:00	
n306jy	10/05/01	07:09		00/00/00	00:00	
n306dg	10/05/01	08:17	kn306dg	10/08/01	10:31	
n982jj	08/02/02	14:15		00/00/00	00:00	
mpad	07/02/02	16:13		00/00/00	00:00	

- e. Check In Date the date on which the contract information was checked in.
- f. Check In Time the time at which the contract information was checked in.
- 6. The third tab on the Pipeline And Zip Information window is the DWRs Tab. This will display information on what Daily Work Reports have been transferred between the network server database and the Inspector's workstation. That is what Daily Work Reports have been Checked Out and which have been Checked In.

Pipeline /	And Zip Info	ormation						
Samples	ì	Contract	D₩Rs	Ďi	aries	Change Orde	rs Force Ac	counts
Contract II	D: E3A03		Descrip	tion: HATHA	WAY BRIDGE	REPLACEME	NT DESIGN/BL	
User ID	DWR Date	Check Out User ID	Check Out Date	Check Out Time	Check In User ID	Check In Date	Check In Time	<u> </u>
kn306bc	09/06/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
kn306bc	09/07/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
kn306bc	09/08/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
kn306bc	09/09/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
kn306bc	09/10/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
kn306bc	09/11/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
kn306bc	09/12/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
kn306bc	09/13/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
kn306bc	09/14/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
kn306bc	09/15/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	

Sample:	And Zip Info	Contract	D₩Rs	Di	aries Y	Change Orde	rs Force Acco	 ounts
ontract II	D: E3403		Descrip	tion: HATHA	WAY BRIDGE	REPLACEME	NT DESIGN/BL	
Jser ID	D₩R Date	Check Out User ID	Check Out Date	Check Out Time	Check In User ID	Check In Date	Check In Time	<u> </u>
n306bc	09/06/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
n306bc	09/07/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
n306bc	09/08/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
n306bc	09/09/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
n306bc	09/10/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
n306bc	09/11/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
n306bc	09/12/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
n306bc	09/13/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
n306bc	09/14/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	
n306bc	09/15/01	kn306dg	10/05/01	08:19	kn306dg	10/05/01	08:37	

7. The fourth tab on the Pipeline And Zip Information window is the Diaries Tab. This will display information on what Diaries have been transferred between the network server database and the Inspector's workstation. That is, what Diaries have been Checked Out and which have been Checked In.



6.8. The fifth tab on the **Pipeline And Zip Information** window is the **Change Order Tab**. This will display information on what Change Orders have been transferred between the network server database and the Inspector's workstation. Since Change Orders can only be entered and edited while logged onto the network server database, Change Orders will only be transferred down to or Checked Out to the Inspector's workstation.

1 👫 🕸 😤	idow <u>H</u> elp						
Pipeline And Z	ip Information						
Samples Contract		DWRs Y		Diaries	Change Orders	Force Accounts	
ontract ID: E3	A03	D	escription:	HATHAWAY BRID	GE REPLACEMENT	DESIGN/BL	
Change Order Number	Check Out User ID	Check Out Date	Check Ou Time				
001	kn306bt	10/06/01	11:18				
001	kn306jy	10/05/01	07:09				
001	kn306dg	10/05/01	08:17	1			
001	cn982jj	08/02/02	14:15	1			
001	jimpad	07/02/02	16:13	1			

7.9. The sixth and last tab on the **Pipeline And Zip Information** window is the **Force Accounts Tab**. FDOT has no plans currently to utilize **Force Accounts** so this tab will not be used.

This page left blank intentionally.



The END.