Appendix A1 – SiteManager: Project Manager/Inspector

Note: Revisions forthcoming (Aug 2010)

TABLE of CONTENTS

Section One – Logging On

Section Two – Daily Work Reports

Section Three – Daily Diaries

Section Four – Contract Estimates

Section Five – Sampling and Testing

Section Six – Construction Change Orders

Section Seven – Labor Wage Checks

Section Eight – Contractor Payrolls

Section One – Logging On Note: This has not been updated.

1-A100 Introduction

This manual has been written to standardize methods for entering information into the State's construction monitoring software, **SiteManager™**. It provides step-by-step navigation through the menus, data entry requirements for project staff, and various tips. State policy has been incorporated into applicable areas.

Basic computer operating skills are assumed. The Learning Lab provides training in basic computer use. Anyone interested in improving their computer skills may contact their supervisor for more information.

Further help is available through the SiteManager Help File.

The Office of Quality Assurance, in conjunction with the Office of Information Systems, is charged with the administration, support and oversight of the SiteManager application and its associated functions.

The Office of Construction is charged with establishing and overseeing the business uses of the application in the administration of the Department's contracts. In addition, there are staff members within each District and the Lab, who are assigned to support the SiteManager System. These personnel are available to assist unit staff with SiteManager questions or problems.

1-A101 Getting Started

<u>In order to start using Site Manager, there are two different areas necessary for logging onto the system. The first area procedure outlines logging onto the Remote Desktop, and the second outlines logging onto Site Manager itself.</u>

1-A101A – Server Logon

At the desktop, double click on **Remote Desktop Connection Icon**. This icon is sometimes labeled as **SiteManager** (If you do not have this icon on your desk top go to the **Start** button, to **Programs**, to **Accessories**, to **Remote Desktop Connection**.)

The **Remote Desktop Connection** window will open. Due to various Windows Updates, you may have screens that differ from the following screen shots. The procedure is basically the same however, if you need assistance you can contact the Site Manager System Administrator.

(Note: when you sign in for the first time, you may have to enter '**sdcooc01**' **or 'sdcooc02'** in the **Computer:** field. Typically users in Districts 3 and 4 use sdcooc01, and users in Districts 1 and 2 use sdcooc02).

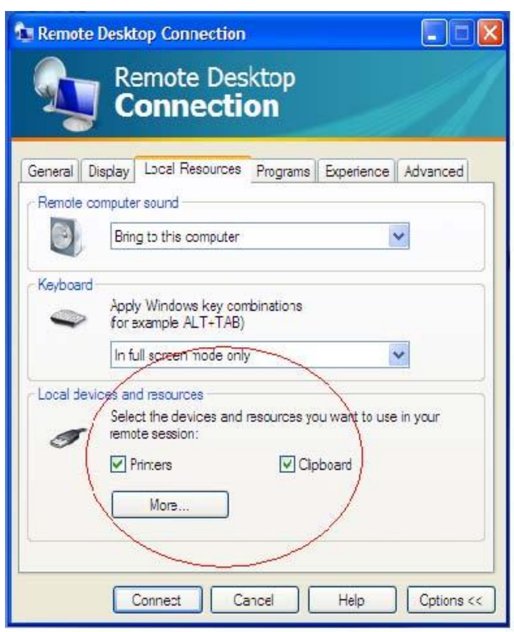
You may find it useful to allow sharing between your local computer and the Terminal Server so that you can easily save data from Terminal Server to your local hard drive or removable media. This is especially important because files should <u>not</u> be stored on the Terminal Server, as this has an adverse effect on the performance of the server. Excess files will be removed by PC Support and no recovery options will be offered. This is also true of the T:\ drive that may be accessible from your local PC.

To enable sharing between the local computer and the Terminal Server (The following screen shots may be different, depending on the server you are on. The method is similar. If you have questions, contact your Site Manager Administrator):

- Choose the Options button:

- Select the Local Resources Tab:

- Ensure that Printers and Clipboard are checked and click the “More” button:



- Ensure that the "Drives" box is checked and click OK:

- Click on the **Connect** button.

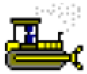
A server desktop will open with the computer name (sdcooc01 or sdcooc02) listed within a tab on the top of the screen.

- The **Log onto Windows** window will open.
    - Enter your **User Name** and **Password**. (Note: these will be the same as your log-in information for the network computer.
    - In the **Log on to:** dropdown field, choose or enter '**CONNDOT_01**'.
    - Click on the **OK** button (or press **Enter**).

You will now find yourself on the Remote Server Desktop. This desktop will look similar to your local desktop and has all of the same functionality. The difference is that you will actually be working on a computer in a different location, and not on your local PC.

1-A101B – Logon

Look for the **SiteManager PRODUCTION 3.5a** and **SiteManager Reporting** Icons. These will likely be the most frequently used applications during your session.

- Double Click on the **SiteManager PRODUCTION 3.5a** bulldozer icon.  This will take you to the SiteManager Application logon screen. The **SiteManager Logon** window will open.
- Enter your **User ID** that was provided to you by your SiteManager District Administrator.
- Generally, your **User ID** will be the first six characters of your last name followed by the first initial of your first name. All characters will be in lower case.

1. Upon your initial logon to SiteManager (or whenever your password is reset), your password will be **'PASSWORD'** (enter as all capitals – SiteManager is case sensitive).

- Enter 'PASSWORD' in the Password field.
- Click the Change Password button.

The **Change Password for User ID** window will open.

- Enter 'PASSWORD' as your Old Password.
- Enter and confirm your New Password (the new password must be 4 to 8 characters or digits). (Note: no form of the word 'password' is allowed.)
- Click the OK button.

2. Subsequent logons require you to use your New Password (Type your password exactly as entered. Remember that SiteManager is case sensitive.)

- Enter your password.
- Press the Logon button (or press Enter).

TIPS

- ❖ SiteManager Security will lock the system after three consecutive logon failures. Always close and restart the logon screen after two failed attempts. If logon continues to fail, contact your SiteManager District Administrator.
- ❖ You may change your password as often as you desire.
- ❖ If you forget your password, contact your SiteManager District Administrator, who will have it reset to 'PASSWORD'.
- ❖ If your User ID is not found, make sure in was input in lowercase – SiteManager is case sensitive- otherwise, check with your SiteManager District Administrator.

1-A101C – Enter SiteManager

The **Available Groups for User ID** window will open.

. Select how you wish to enter SiteManager by highlighting the appropriate **Group Name** and pressing **OK**. The **SiteManager Panel** window will open.

(Note: Each group has specific rights. Choose the one that applies to the tasks you wish to perform. **In order to avoid possible errors, always choose the group with the lowest level of rights available)**

It is advisable to select your contract upon entering SiteManager:

Double click the **Contract Administration (+)** icon.
Double click the **Contract Records (+)** icon.
Double click the **Contracts** (or **Projects**) icon. The **Select Contract** window will open.

• Double click your appropriate **Contract ID**. At this point your contract is open. All tasks will apply only to the selected contract.

- Click the **SiteManager Panel** icon (or click the **File** pull-down menu, then click **Main Panel**) to reopen the **SiteManager Panel**.

The following icons are available on the SiteManager Main Panel (For detailed usage, see appropriate section)
Icons with a (+) next to them will open a new panel when selected:

- Contract Administration (+)
- Daily Work Reports (+)
- Contractor Payments (+)
- Change Orders (+)
- Civil Rights (+)
- Materials Management (+)
- Accessories (+)

Section Two – Daily Work Reports

1-A102 – Daily Work Reports (DWR's)

A **Daily Work Report** is required only when there is (contract work being performed) construction activity.

A **Daily Work Report** may be created for a 'No Activity' day to make item payments. For example, to pay for a project field office during a winter shut-down period.

In accordance with Section 1-303A "Daily Work Report and Dairy", Inspectors compile their daily DWRs at the work site and enter a comprehensive description of the work that took place that day into the SiteManager DWR. If there is a significant amount of information contained in the DWR, it is generally acceptable to provide a comprehensive description in the space that is available and then refer to the hard copy DWR for the additional information and description. In this scenario, the user must include a reference to the additional information (Ex. "Refer to DWR (Date and User ID) Hard Copy for details of work performed (replace date and user ID with the proper information). It should also be noted that users may attach a document to their DWR within SiteManager. As in the above example, proper reference should be made.

1-A102A - Add Contractor Personnel for DWR's

At the start of the project, the Project Manager is responsible to add and maintain the labor classes that each contractor will be using on the Project to the 'Personnel Type' pull down menu. **Navigation to add personnel is:**

- **Starting at the** Main Panel**, Double-click on the** Daily Work Reports (+) **icon,**
- **Double-click on the** Reference Tables (DWR+) **icon,**
- **Double-click on the** Contract Master List **icon. The** Select Contract Vendor **window will open.**
- **Double-click the desired contract.**

A list of contractors (vendors) will appear.

- **Double-click on the contractor that you would like to add personnel to. The** Contract Master List

window will open and the Equipment **bullet will be active.**

- **Click the** Personnel **bullet.**
- **Highlight a title under the** Personnel Name **column.**
- **Click** Add **to transfer the personnel type from the** Vendor Master List **to the** Contract Vendor List**.**
- **Repeat the steps until all personnel are added.**
- **Click the** Save **icon.**
- **Click the** Open Folder **icon to open the** Select Contract Vendor **window.**
- **Select a new contractor, and add personnel by following the steps above.**
- **When all personnel has been added to the project, Press the** Save **icon and close the window.**

You will now be back at the Contractor **tab within the DWR.**

- Click the **New** icon. A pull down menu will appear.
- Select a personnel type by pressing the down arrow and highlighting a classification.
- Enter the number of each personnel type, and their hours worked.

SiteManager will compute the total hours and transfer them to other fields on this screen.

After all information has been added relating to the **Contractors** tab, click the **Save** icon.

1-A102B - Add Contractor Equipment for DWR's

At the start of the project, the Project Manager is responsible to add and maintain the equipment that each contractor will be using on the Project to the 'Equipment ID – Description' pull down menu: **Navigation to add equipment is:**

- **Starting at the** Main Panel**, Double-click on the** Daily Work Reports (+) **icon,**
- **Double-click on the** Reference Tables (DWR+) **icon,**
- **Double-click on the** Contract Master List **icon. The** Select Contract Vendor **window will open.**
- **Double-click the desired contract. A list of contractors (vendors) will appear.**
- **Double-click on the contractor that you would like to add equipment to.**

The Contract Master List **window will open and the** Equipment **bullet will be active.**

- **Highlight a title under the** Equipment Description **column.**
- **Click** Add **to transfer the equipment type from the** Vendor Master List **to the** Contract Vendor List**.**
- **Repeat the steps until all equipment is added.**
- **Click the** Save **icon.**
- **Click the** Open Folder **icon to open the** Select Contract Vendor **window.**
- **Select a new contractor, and add equipment by following the steps above.**
- **When all equipment has been added to the project, Press the** Save **icon and close the window.**

You will now be back at the Contractor Equip. **tab within the DWR.**

- Click the **New** icon. A pull down menu will appear.
- Select an equipment type by pressing the down arrow and highlighting a classification.
- Enter the number of each equipment type, number used, and hours used.
- After all information has been added relating to the **Contractors Equip.** tab, click the **Save** icon.

Note: If a particular personnel or equipment type is unavailable from the master list, please contact your District SM Administrator.

1-A102C – Daily Work Reports

<u>It is advisable to select your contract upon entering SiteManager:</u>

- Double click the **Contract Administration (+)** icon.
- Double click the **Contract Records (+)** icon.
- Double click the **Contracts** (or **Projects**) icon. The **Select Contract** window will open.
- Double click your appropriate **Contract ID**. All **Daily Work Reports** that you enter from this point will be related to your Contract.
- Click the **Main Panel** icon. 
- Click the **Main Panel** tab.
- Double click the Daily Work Reports (+) icon to open the Daily Work Reports (+) menu.
- Double click the Daily Work Reports icon to open the Daily Work Reports window.

The **DWR Info.** tab will be active, and the current date will be shown.

1-A102D - Create a DWR

- Double click on the 'DWR Date:' field. A calendar will open with the current date highlighted.
- Single click the desired DWR date, and press OK. You may also put the cursor in the date field and manually input the six-digit date.

There are six sections that comprise a Daily Work Report (DWR): **DWR Info.**, **Contractors**, **Contractor Equip.**, **Daily Staff**, **Work Items**, and **Force Accounts**. Please note that not all of these sections are required. The only mandatory sections are **DWR INFO, Contractors and Work Items**. The other sections are available if additional information is desired, and may be used at the users' discretion.

1-A102D-1 - Active Tab = DWR Info.

- Input the high and low temperatures.
- Select the morning and afternoon weather conditions using the pull down menus.

SiteManager will automatically check the following boxes: **No Work Items Installed**, **No Contractors On Site**, and **No Daily Staff On Site**. SiteManager will automatically update the status of the checks for these fields based on information that is entered in the balance of the DWR.

- If applicable, check the **Work Suspended** box, then enter the appropriate times.

<u>The following examples are recommendations for entering information within the **Remarks:** fields:</u> (Note that when information is saved in any of the categories mentioned below, a "check" symbol will appear next to that category description.)

There are three scenarios for entering information within the **General** category:

1. Project Manager, with or without sub-inspectors, no activity and with payments:
   General No Contractor Activity: Prime Contractor to Project 123-123
   Schilling, C.: Review Cost Plus
   Smith, R.: Testing
   McGraw, T.: Volume III Computations
   Phone call to DOT Design, RE: plantings.
   Make monthly payment for project field office.

2. Project Manager with no sub-inspectors, with contractor activity:
   General Waters Construction – East St. – drainage
   CCA – East St. – construction staking

Santoro – East St. – sawcutting
Conn. Traffic Control – East St. – traffic control
Phone call to DOT Design, RE: plantings
Issue speed memo to prime, RE: turf est. req'd for slope stabilization.

3. Project Manager with sub-inspectors and contractor activity:
General See DWR MMDDYY schillc for end-of-month payments.
See DWR MMDDYY smithr for sawcutting and utilities
See DWR MMDDYY mcgrawt for drainage, traffic control and staking.
Phone call to DOT Design, RE: plantings.
Issue speed memo to prime, RE: turf est. req'd for slope stabilization.

The following examples are recommendations for entering information within the remainder of the **Remarks** fields:

(Note: Categories can be left blank if there are no relevant comments. Information is only required if it pertains to significant events that occurred on the project)

Accident West Street, NB lane 1030 +/-, car vs. truck, Town police on scene.

EEO Issues 30% EEO site meeting rescheduled for next week

Environmental Sed. fence adjacent to field office undermined by runoff from noon thunderstorm. Contractor repaired before the end of work.

Meetings Utility Meeting with T.R. James Construction, Yankee Gas, and Conn DOT. See minutes.

PE Record Review Project Engineer on site: Review volume 1.

Personnel Remarks Only note staff present. Do not include staff on leave or leave type.

Possible Cost Plus During sawcutting of roadway for drainage installation, found concrete roadway (cutting of concrete roadway item to be added). Refer to hard copy DWR for labor and equipment.

Possible Dispute or Claim Discussion with contractor – item #0406013 (qty increase over 125%).

Safety Violations Prime Contractor instructed to protect drop-off along edge of sidewalk.

Lane Closures South Street closed, detour in effect. East Street alternate one-way, station 0+120 to 0+200, 0700-0930.

Utility CON-40 Info T. R. James Construction for Yankee Gas relocating gas line 0900-1400 South Street, station 1+040 to 1+080, right. Refer to hard copy DWR for men, equipment and CON-40 #.

Visitor Mr. Smithers, Public Works Dept.
Mr. Jones, Project Engineer

Weather Heavy winds and thunderstorm from 1200-1230

Work Hours Waters Construction Co.: 0630-1430
CCA: 0900-1600
Santoro: 0900-1200
Conn. Traffic Control: 0630-1600
Schilling, C.: 0700-1430

Smith, R.: 0630-1200
McGraw, T.: 0800-1600

TIPS

- All DWR's must be referenced by the applicable User ID. For example, a DWR for July 8, 2004, by an inspector named Raymond Smith, would be "DWR 070804 smithr".
- DWR attachments must also be fully labeled. For example, an attachment to the above would be labeled "DWR 070804 smithr-1". Back-up for that page would be "DWR 070804 smithr-1a". If there were another attachment (a speed memo or a wholly separate computation), it would be "DWR 070804 smithr-2".

1-A102D-2 -Active Tab = Contractors

When the **Contractors** tab is active, there are three areas to input information: **Contractor**, **Supervisor/Foreman Name**, and **Personnel Type**. The only area that is required to be filled is the **Contractor** field. SiteManager will not allow items to be entered in the Work Item tab unless there is a contractor associated with the DWR. Be sure to select the correct contractor that is associated with the work. This helps with tracking items that are specifically assigned to contractors, such as DBE contractors. Items that are assigned to other contractors should NOT be paid under the prime contractor.

No personnel will be available for DWR's until they are added to the dropdown menu. The Project Manager is responsible to add personnel to the personnel type dropdown menu. See Section 1-A102A above, for navigation.

- Click anywhere in the **Contractor** area to highlight it. You will see a shadow line on the right side and bottom of the active area.
- Press the **New** icon. A dropdown menu will appear. Select a contractor by pressing the down arrow and highlighting the contractor. Do not enter information in the columns on the right. SiteManager will update these fields as you input information.

Supervisor/Foreman Name area. Call the District SiteManager Administrator to have the Supervisor/Foreman Name entered for your particular project.

- Click anywhere on the **Personnel Type** area to highlight it.
- Press the **New** icon. A dropdown menu will appear. Select a personnel type by pressing the down arrow and highlighting the title.
- Enter information in the **Nbr of Persons** field.
- Enter information in the **Hours Worked** field.
- Press the **New** icon to add more personnel types.
- Press the **Save** icon.

Note: Each particular personnel type (i.e. laborer) can only be entered once per DWR. Therefore, if you have more than one particular personnel type and they work a different number of hours that day, you would need to enter a remark to record their separate work hours.

1-A102D-3 - Active Tab = Contractor's Equipment

When the **Contractor Equip.** tab is active, there are two areas to input information: **Contractor** and **Equipment ID – Description**.

No equipment will be available for DWR's until they are added to the pull down menu. The Project Manager is responsible to add equipment to the equipment type pull down menu. See Section 1-A102B above, for navigation.

- Click anywhere in the Contractor area to highlight it. You will see a shadow line on the right side and bottom of the active area.
- Press the New icon. A dropdown menu will appear.
- Select a contractor by pressing the down arrow and highlighting the contractor. Do not enter information in the columns on the right. SiteManager will update these fields as you input information.
- Click anywhere on the **Equipment ID - Description** area to highlight it.
- Press the **New** icon. A dropdown menu will appear. Select a piece of equipment by pressing the down arrow and highlighting the description.
- Enter information in the Nbr of Pieces field.
- Enter information in the Nbr Used field.
- Enter information in the Hours Used field.
- The Hours Used field is used for cost plus operations or specialized equipment.
- Press the New icon to add more equipment.
- Press the Save icon.

Note: Each particular equipment type (i.e. backhoe) can only be entered once per DWR. Therefore, if you have more than one particular equipment type and this equipment is used for cost plus operations, you would need to enter a remark to record the separate work hours.

The Remarks balloon shown on the tool bar above can be used to add specific details regarding the equipment such as whether it is rented / borrowed. Another advantage to the use of the Remarks Balloon is to comment on the quality, type of use or status of the equipment (idle or not) or any additional optional equipment to support or enhance its performance. However, if this piece of equipment will be used repeatedly on the project, if there is a potential for claim or it is significant enough to warrant record of use such as for specialty operations like a crane, then the equipment <u>must</u> be added to the Contractor's master list of equipment including make, model, year and size.

1-A102D-4 - Active Tab = Daily Staff

Navigation to enter inspection force personnel is:

- Click the **New** icon. A dropdown screen will appear.
- Choose the project personnel and enter their regular and overtime hours. Repeat for each staff member.

After all information has been added relating to the **Daily Staff** tab, click the **Save** icon.

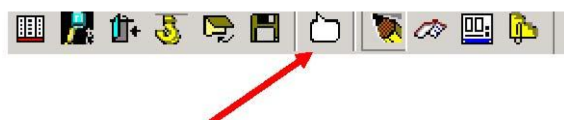
1-A102D-5 - Active Tab = Work Items

When the **Work Items** tab is active, the project item list is visible.

- Scroll through the list to find the pay item.
- Double click the item to see the item screen.
- Press the **new** icon to activate the pay fields.
- Enter information in **Placed Qty**, and **Location** fields.
- Click the **Contractor:** pull down to select a contractor. Be sure to enter the appropriate contractor for the assigned item. Do NOT simply pay an item to the prime contractor if it is assigned to a sub contractor.

TIPS

- ❖ If a contractor was not selected in the Contractors tab, the pay fields will not be active (white). To make payments on a DWR that does not track contractor activity (monthly items), you must select a contractor under the Contractor tab, but it is not necessary to select any personnel or equipment.
- ❖ Be advised that if you choose to enter information in one of the Station, Offset, or Distance fields, you will have to make a notation in every one of the Station and Offset fields.

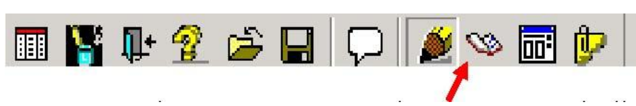


- Press the Remarks icon.
- Enter the DWR and/or Volume III reference for that pay item. Also, enter specific comments for the daily activity for the item.

<u>When entering information for the **Trafficperson** item, be sure to include the trafficperson's name, affiliation, badge number, hours worked, and lunch/no lunch in the **Remarks** field.</u>

- Close the Remarks window by pressing the icon again.

If there is a second payment for that same pay item, press the **New** icon. You will see a second line appear and the **Loc Seq Nbr** field will read "2". Enter information as stated above.



- Press the **Select Work Item** icon to return to the list of pay items.

Repeat the steps until all payments are entered.

- Press the **Save** icon.

1-A102D-6 - Active Tab = Force Accounts

No information can be entered in the **Force Accounts** tab. It is not being used at this time.

1-A102E - Open an existing DWR

- Press the **Open Folder** icon, or, click the **File** pull down menu, and select **Open**.

A **Daily Work Reports** sub-window opens asking if you would like to "Save changes?" **Be careful that you do not accidentally save the DWR!** If there is no activity for the date shown, no DWR is required. DWR's created accidentally cannot be deleted.

The **Contract ID** window will open.

- Double click the **User ID** for the DWR you are opening. Scroll through the list, and double click the date of the DWR you are opening.

If the DWR has been authorized by the Project Manager (Chief Inspector), an **AASHTO SiteManager** window will appear informing you that the DWR will be opened as "Read Only". This means that no information can be modified. Simply press **OK** to continue.

If the Project Manager has not authorized the DWR yet, the DWR will open with the **DWR Info.** tab active.

1-A102F - Copy an existing DWR

On days where men and equipment do not change much, it is possible to copy a DWR. The data from the **Contractors**, **Contractor Equip.**, and **Daily Staff** tabs will be copied from an existing DWR to a new DWR.

- Open the DWR that you want to copy.
- Double click anywhere in the **DWR Date** field. The **Select Date** window opens.
- Select the date of the new DWR.
- Click **OK**. The **Copy?** Window opens questioning if you would like to "Copy Contractor Information?"
- Click **Yes** or **No**.

- When **Yes** is pressed, a new DWR will appear with the new date. Information on the **Contractors**, **Contractors Equip.**, and **Daily Staff** tabs will be copied. This information needs to be reviewed and modified as required.

- When **No** is pressed, no information will be copied, and a new DWR will appear with the new date.

- After all information has been added relating to the DWR Info. tab, click the Save icon.

This feature is of significant benefit for the user. It allows repetitive information to be carried from one day to the next, which will result in a savings of time and effort. Minimal changes can be made to each section if necessary, resulting in faster processing of Daily Work Reports.

1-A102G - Review a DWR

Navigation to review a DWR is:

- Press the **Services** dropdown menu.
- Select **Preview DWR**. The **Print Preview** window opens. Scroll through the DWR to ensure the information is correct.

TIP

- DWR's shall be arranged in the Volume I in alphabetical order based on the **User ID**.
- DWR's and Diaries that are printed from SiteManager and added to the Volume One must be signed as shown here. All field notes for that day must be attached to the DWR.

  Robert Smith (signed)
  Robert Smith (printed)
  04/09/2007 (date of DWR)

Section Three – Daily Diaries

1-A103 - Diary

The Diary is entered by the Project Manager to track time (days), and to authorize (approve) DWR's entered by inspection forces. A diary needs to be entered for every calendar day from the actual "Start Date" to the "Completion Date".

For work performed after the "Completion Date" (i.e.: punch list), a Diary is required when a DWR is entered.

For days of active construction, or days with contractor payments (monthly pay items, etc.), DWR's must be entered.

The Project Manager provides a summary of the day's activities in the Diary if it is not already provided in their DWR. In accordance with Section 1-303A "Daily Work Report and Diary", Inspectors compile their daily DWRs at the work site and enter a comprehensive description of the work that took place that day into the SiteManager DWR. If there is a significant amount of information contained in the Diary, it is generally acceptable to provide the summary in the space that is available and then refer to the hard copy Diary or particular DWRs for the additional information and description. In this scenario, the user must include a reference to the additional information (Ex. "Refer to DWR (Date and User ID) Hard Copy for details of work performed (replace date and user ID with the proper information). It should also be noted that users may attach a document to their Diary or DWR within SiteManager. As in the above example, proper reference should be made.

TIP

- A DWR needs to be entered before you use the Diary to authorize the DWR. If the DWR is not in the system, it will not appear in the Diary, and the Project Manager cannot authorize it.

1-A103A – Diary:

It is advisable to select your contract upon entering SiteManager:

- Double click the **Contract Administration (+)** icon.
- Double click the **Contract Records (+)** icon.
- Double click the **Contracts** (or **Projects**) icon. The **Select Contract** window will open.
- Double click your appropriate **Contract ID**.

All **Diaries** that you enter from this point will be related to your Contract.

1-A103B – Create a Diary:

- Click the Main Panel icon.
- Click the Main Panel tab.
- Double click the Daily Work Reports (+) icon to open the Daily Work Reports (+) menu.
- Double click the Diary icon to open the Diary window.

The **Authorize** tab will be active, and the current date will be shown.

- Double click on the '**Diary Date:**' field. A calendar will open with the current date highlighted.
- Single click the desired Diary date, and press **OK**. You may also put the cursor in the date field and manually input the six-digit date.

1-A103C – Enter information on a Diary

TIP

- ❖ If there are DWR's created for the selected date, they will be listed by the inspector's name in the **Inspector** field. Prior to authorizing the DWR, the Project Manager must review it. To review an existing DWR, see Section 1-A103D below.

1-A103C-1 - Active Tab = Authorize

The following examples are recommendations for entering information within the **Remarks:** fields:

There are four scenarios for entering information within the **General** category:

1. Project Manager, with no sub-inspectors, and no activity or payments:
   General No Contractor Activity: Saturday.
   South Street closed, detour in effect.

2. Project Manager, with no sub-inspectors, with contractor activity or payments:
   General Waters Construction – East St. - drainage
   CCA – East St. – construction staking
   Santoro – East St. – sawcutting
   Conn. Traffic Control – East St. – traffic control
   Phone call to DOT Design, RE: plantings.
   Issue speed memo to prime, RE: turf est. req'd for slope stabilization.

3. Project Manager, with sub-inspectors and no activity or payments:
   General No Contractor Activity: Prime Contractor to Project 123-123
   Schilling, C.: Review Cost Plus
   Smith, R.: Testing
   McGraw, T.: Volume III Computations
   Phone call to DOT Design, RE: plantings.
   Issue speed memo to prime, RE: turf est. req'd for slope stabilization.

4. Project Manager, with sub-inspectors, with contractor activity or payments:
   General See DWR MMDDYY schillc for end-of-month payments.
   See DWR MMDDYY smithr for sawcutting and utilities.

See DWR MMDDYY mcgrawt for drainage, traffic control and staking.
Phone call to DOT Design, RE: plantings.
Issue speed memo to prime, RE: turf est. req'd for slope stabilization.

Categories can be left blank if there are no relevant comments. Information is only required if it pertains to significant events that occurred on the project. Other Categories contained in the Diary are:

Accident
EEO Issues
Environmental Meetings
PE Record Review
Personnel Remarks
Possible Cost Plus
Possible Dispute or Claim Safety
Violations Lane Closures
Utility CON-40
Info Visitor
Weather Work Hours

TIP

- ❖ You can cut and paste from a DWR to the Diary.

1-A103C-2 – Active Tab = Charge

Press the **Charge** tab to view the contract time related fields. SiteManager tracks contract days based on the information entered in these fields.

When a diary is created, SiteManager will default the **Charge Type** to **Full Day**.

This needs to be changed if the project is completed, or if the Contract runs throughout the winter (and you do not count winter days).

Navigation to change the **Charge Type** is:

- Press the field next to **No Charge**

The **Credit Reason** field will become active.

- Select the appropriate reason from the dropdown menu.
- Press the **Save** icon
- Press the **Authorize** tab

1-A103D – Review and Authorize a DWR (in the Diary)

With the **Authorize** tab active, the Project Manager can review DWR's. Navigation to review a DWR is:

- Highlight the desired **inspector** name
- Press the **Services** dropdown menu

- Select **Preview DWR.** The **Print Preview** window will open.
  - Scroll through the DWR to ensure information has been entered correctly. The only person who can change DWR information is the DWR creator (inspector).
  - Close the window to return to the Diary. If the DWR information is accurate, the Project Manager can authorize the DWR.
- Check the box in the **Authorized** column of the acceptable DWR
- Press the **Save** icon The authorized date will appear in the **Authorized Date** column.
- Repeat these steps for each DWR listed.
- If a mistake is found on a DWR at some later date (but before an estimate is run), the DWR can be unauthorized and corrections can be made.

To unauthorize the Diary (before the estimate has been run), click in the **Authorized** Box to remove the check mark. Save the Diary. Then, make the necessary corrections on the DWR and save the DWR. Go back to the Diary and authorize again. Save the Diary.

1-A103E – Print a Diary

With the **Authorize** tab active, press the **Services** dropdown menu, then select **Preview Diary**. The **Print Preview** window will open. Review the Diary, and then press the **Print** button.

The Diary printout shows the **Charge** and **No Charge** calendar days.

To correctly track the calendar days, each Diary must be entered and printed before the next Diary is created. If Diaries are not printed out as they are entered, the calendar days will be incorrect. In this case, the Project Manager is responsible to draw a line through the incorrect number, and write in the correct number. For example: A contract starts on Saturday (Day 1). The contractor will not be working for a week or so. On Tuesday (Day 4), the Project Manager enters Diaries for Saturday, Sunday, and Monday. When the Project Manager prints the Diaries, they will incorrectly read "**3**" in the **Total Number of Diaries:** field. If they were printed out as they were completed, the **Total Number of Diaries:** fields would correctly read "**1**", "**2**", and "**3**", respectively.

TIP

- The Diary precedes any DWRs for that day in the Volume I.
- The Project Manager signs the Diary as shown here:

  Robert Smith (signed)
  Robert Smith (printed)
  04/09/2007 (date of DWR)

Section Four – Contract Estimates

1-A104 – Contractor Payments

1-A104A – Estimates

It is advisable to select your contract upon entering SiteManager:

- Double click the **Contract Administration (+)** icon.
- Double click the **Contract Records (+)** icon.
- Double click the **Contracts** (or **Projects**) icon. The **Select Contract** window will open.
- Double click your appropriate **Contract ID**.

All **Estimates** that you enter from this point will be related to your Contract.

1-A104B – Generate an Estimate

TIP

Before generating an estimate, you can view the work installed since the last estimate. From the Main Panel, click on **Contractor Payments (+)** icon. Then click on **Reports (CP+)** icon. Next, click on **Installed Work** icon. Choose your contract from the Report Criteria and click OK.

- Click the **Main Panel** icon.
- Click the **Main Panel** tab.
- Click the **Contractor Payments (+)** icon.
- Double click the **Estimate (+)** icon.
- Double click the **Generate Estimate** icon.
- The **Contracts** window will open.
- Double click the contract.
- The **Generate Estimate** window will open.
- SiteManager will assign an estimate begin date. Enter the required **End:** date manually in the field, or by choosing the date from the calendar.

SiteManager will default **Type** to **Progress**. Leave it that way.

- Click the **Generate Estimate** icon.
- A window opens stating, "Job Submitted to BACKGND". Click **OK**.
- A window opens stating, "Process OCPINTESA Submitted.". Click **OK**.
- After a short wait, a window opens stating, "Profile OCPINTES for process OCPINTESA has completed".
- Click **OK**.

All fields within the **Generate Estimate** window will become gray.

- Close the window by clicking the **X** in the upper-right hand corner.

1-A104C – Print an Estimate

- Click on the **SiteManager Panel** icon (the **Estimate (+)** tab will be active).
- Click on the **Contractor Payments (+)** tab.
- Click on the **Process List** icon.

- Click on Pay Estimate\Federal Aid Sheet.
- Click Subset.
- Select your contract number and the estimate number you want to print. Click OK.
- Click Submit.
- Click OK when message appears that "Process FEDAID-3A was submitted."
- Click OK when message appears that "Profile FEDAID-3A for process FEDAID-3 has completed." Note: If you do not get the "completed" message after 30 Seconds, continue to the next step
- Go to Services and select Process Status.
- Click on FedAIDA.
- Click on Output.html. Your estimate will appear.
- Go to File, Page Setup and select Landscape. Click OK. You can now print the estimate.
- Note: If you request the estimate to be printed again, it will now be FEDAIDB, and then C, etc.

1-A104D – Approve an Estimate:

The **Contracts** window will be open.

- Click on the **SiteManager Panel** icon (the **Estimate (+)** tab will be active).
- Double click the **Estimate Approval** icon. The **Select Contract/Estimate** window will open.
- Double click the contract. The **Estimate Approve** window will open. Check to ensure that the appropriate estimate number is correct.
- Within the **Approval Levels** field, check the box next to your name. – If a window opens that mentions discrepancies, simply click No.
- Click on the **Save** icon.
- After a short wait a window opens stating, "Mail Sent to PE.". Click **OK**.

Section Five – Sampling and Testing

1-A105 - Materials Testing (MAT-100's)

1-A105A – Material Testing

It is advisable to select your contract upon entering SiteManager:

- Double click the **Contract Administration (+)** icon.
- Double click the **Contract Records (+)** icon.
- Double click the **Contracts** (or **Projects**) icon. The **Select Contract** window will open.
- Double click your appropriate **Contract ID**.

All **Mat-100's** that you enter from this point will be related to your Contract.

1-A105B – Print a Contract-Item-Materials Report

Prior to the testing of any materials on a contract, the inspectors MUST have the correct item codes (and unit types) to assign proper testing to specific materials. The item codes (and unit types) are available to the inspector on the CONTRACT-ITEM-MATERIALS report. In addition to supplying the item codes (and unit types), this report also supplies each and every material that needs to be tested for each contract item. The following navigation will allow the inspector to obtain this report:

- Click the **Main Panel** icon.
- Click the **Main Panel** tab.
- Click the **Materials Management** (+) icon.
- Double click the **Process List** icon. The **Process List** window will open.
- Double click the "CITM_GEN" under the **Process ID** heading (or "Contract Item Material Assignments with Revisions" under the **Process Description** heading). The **Confirm Process Submission** window will open.
- Click on the **Subset** button. The **Select Subset** window will open.
- Click the contract.
- Press the **OK** button. The **Confirm Process Submission** window will re-open.
- Click on the **Submit** button.
- A window opens stating, "Process CITM_GENA Submitted.". Click **OK**.
- A window opens stating, "Profile CITM_GENA for process CITM_GEN has completed.". Click **OK**.
- Click **Services** on the upper **Toolbar**.
- Choose **Process Status**. The **Process Status** window will open (the **Regular** tab will be active).
- Double click the "CITM_GENA" choice under the **Process Name** heading. The **Files for Process CITM_GENA** window will open.

Double click the "Output.html" choice under the **Name** heading. The **CONTRACT-ITEM-MATERIALS** window will open. Choose the **Print** icon to print the report.

Place this report within your testing file. You will need to refer to this report when you enter a new MAT-100 into SiteManager.

1-A105C – Create a MAT-100

- From the Main Panel, double click the **Materials Management (+)** icon.
- Double click the **Sampling and Testing (+)** icon.
- Double click the **Sample Information** icon.

The **Maintain Sample Information** window will open (the **Basic Sample Data** tab will be active).

1-A105C-1 – Active Tab = Basic Sample Data

Enter information in the listed fields as follows:

- **Smpl ID:** All general MAT-100's will be a minimum of fifteen (15) characters long. Enter according to the following format:

The capital letter "C", the 4-digit town number, a hyphen, the 4-digit **contract number**, the capital letter "C", the 4-digit sample number (example: C0051-0251C0001).

TIPS

- If a MAT-100 is for bituminous material, the second capital "C" will be substituted with a capital "B" (example: C0051-0251B0001, with the 4-digit sample number resetting to 0001).
- Use Sample Type Dropdown List.

- ❖ If a MAT-100 is to be used for a Concrete Cylinder Test, use C6001. (Example: C0051-0251C6001). For the next Concrete Cylinder Test, use C6002, etc.
- ❖ If a MAT-100 is being used as an 'A' version to an existing MAT-100, a capital "A" will follow the 4-digit sample number (example: C0051-0251C0001A).

- **Smpl Unit:** Choose the correct unit for the material you are testing from the dropdown screen. (Note: The sample unit for a Concrete Cylinder Test is not cylinder; it is either cubic yards or cubic meters.)
- **Status:** This field is left as the default "Spaces". When you have completed the MAT-100, change the status to Pending. (Note: The LAB will not be able to retrieve the MAT-100 unless the sample status is Pending.)
- **Revised By:** This will automatically be filled in on an original MAT-100 that was revised. Otherwise, it will be a grayed area.
- **Revising:** This is automatically filled in on the MAT-100 if you selected "Revise" from Services.
- **Smpl Dt:** Manually input the six-digit date.
- **Link To:** Leave this field blank.
- **Link From:** As with other aspects of SiteManager, grayed areas are non-enterable.
- **Log Dt:** Leave this field blank. (Note: The LAB will enter the Log Date as the date that the sample is received by the LAB)
- **Smpl Type:** Select the appropriate sample type from the dropdown list. (Note: Bid Sample is not for Construction use)
- **Acpt Meth:** Select the appropriate acceptance method from the dropdown list. (Note: Past Performance is for LAB use only)
- **Smpld By:** Place the cursor over the white field and right-click the mouse to perform a "search". The **Search Window** will open. Scroll down and single-click your name. Press OK. Your full name will be entered in the field adjacent to the **Smpld By** field.
- **Material:** Place the cursor over the white field and right-click the mouse to perform a "search". The **Search Window** will open. Scroll down and single-click the correct Material Code you are testing. Press **OK**. The material name will be entered in the field adjacent to the **Material** field. (Note: If the Material Code is not available, contact Rick Bassett at the LAB at 860-258-0366.)

TIP

The **Material Code** that you are searching for in this field is the code that was supplied to you in the **CONTRACT-ITEM-MATERIALS** report as mentioned in the beginning of this section.

- **P/S:** Place the cursor over the white field and right-click the mouse to perform a "search". The **Search Window** will open. Scroll down and single-click the correct **Producer Supplier Code** (or **Producer Supplier Name**). Press **OK**. The producer or supplier of the material will be entered in the field adjacent to the **P/S:** field.

Note: If the Material Code you are testing is not associated in SiteManager with the Producer/Supplier that used the material, select 0951, TEMPORARY VENDOR as the Producer/Supplier. If you select 0951 as the Producer/Supplier, you must enter the appropriate information in the remarks. This information should include the vendor's name, address, phone number, etc. You should also contract the appropriate section at the LAB.

- **Type:** As with other aspects of SiteManager, grayed areas are non-enterable. If information is available, SiteManager will automatically populate this information directly into this field.
- **City:** As with other aspects of SiteManager, grayed areas are non-enterable. If information is available, SiteManager will automatically populate this information directly into this field.
- **Mnfctr:** Leave this field blank.
- **Town:** Enter the town or city that the material is being utilized within.
- **Geog Area:** Choose the correct District from the dropdown screen that the material is being utilized within.
- **Prod Nm:** Leave this field blank.
- **Intd Use:** Input a brief description of the intended use for the material. (Note: The intended use should not be "jobsite", "project limits", "throughout project", etc.)
- **Represented Quantity:** Enter the material quantity of the material that is being tested. (Note: This quantity cannot exceed the maximum quantity indicated in the "Frequency for Acceptance" column of the "Minimum Requirements for Sampling Materials for Test" for that particular material. Testing coverage for that material with the sample will only be recorded up to the maximum quantity allowed. Testing deficiencies will result if inspectors do not submit enough samples for the quantity of material used on the project.
- **Auth By:** As with other aspects of SiteManager, grayed areas are non-enterable. This information will automatically be populated when the MAT-100 is authorized.
- **Auth Date:** As with other aspects of SiteManager, grayed areas are non-enterable. This information will automatically be populated when the authorized date is entered by the LAB.

- After all of the above listed fields have been addressed, press the **Save** icon.
- Click the **Contract** tab (all fields should be grayed out and empty.)

Use COPY SAMPLE Only if the Material Code is to remain the same:

Note: If there are additional samples to be entered that contain the **same** material number, it is possible to copy the sample information, in a similar fashion as the DWR. Simply choose Services from the menu and then Copy Sample. You will need to enter a new sample ID and make any other necessary changes to this tab but most of the information from the previous sample will have been carried over to the new MAT-100.

Only for Catch Basins & Manholes:

In an effort to aid in streamlining the amount of time it takes to create MAT-100's for certain types of material, the Central Lab has issued a memorandum stating that MAT-100's pertaining to Pre-Cast Catch Basins and Manholes, which are to be completed structures only (1440A Catch Basin – Precast (complete) and 1441A Manhole – Precast (complete)) may be entered on a single MAT-100. It must be emphasized that project staff are required to attach all PC-1's that represent components used in the complete catch basin(s) or manhole(s) to the MAT-100. Should unrelated components also be listed on the PC-1, photocopies of the PC-1 may be made and attached to the other MAT-100's provided that the original was previously submitted to the DMT or are submitted at the same time. Photocopies of PC-1's will NOT be accepted unless the sample ID under which the original was (is) submitted is clearly noted and available for verification by DMT personnel.

1-A105C-2 – Active Tab = Additional Sample Data

- **Smpld From:** Input a description of where the sample is from, such as truck, stockpile, bin, etc.

- **Plant ID:** The Plant ID should be entered if the material comes from a bituminous or concrete plant. Place the cursor over the white field and right-click the mouse to perform a "search". Only the Plant ID's associated with the Producer/Supplier listed on the Basic Sample Data tab will appear. Single-click the correct Plant ID. The plant name will appear in the field adjacent to the Plant ID field. The **Plant Type** will also appear after the Plant ID is selected.

- **Seal Number**: Input the seal number or batch number listed on the material certificate for materials such as glass spheres or epoxy paint.

1-A105C-3 – Active Tab = Contract

- Click on the **New** icon. The **Select Contract/Material Information** window will open.

- Double-click the appropriate **Contract ID**. A new window will open listing all items that relate to the Material Code that was input previously.

- Click the correct item that you want the material to be tested for.

- Click **OK**. The **AASHTO SiteManager** window will open asking the question "Do you want to add all Project/Line Items for Contract XXXX-XXXX to this Sample?"

  - Click the **Yes** button if you want them all the listed to be tested on this MAT-100. (Do not click Yes if there are more than 40 items.)

  - Click the **No** button if you want to pick and choose which items are to be added to this MAT-100. If you click the **No** button and additional items are to be added to this MAT-100, you must repeat the above steps starting with **Section 1-A105C-3-Active Tab = Contract:**. This must be repeated until all items are entered.

After choosing the required items for this MAT-100, all fields except **Represented Qty** within the **Contract** tab will be filled-in.

- The **Represented Qty** should be the <u>material quantity</u> for each line item. The total of all of the Represented Qty's on this Tab should equal the **Represented Qty** on the **Basic Sample Data** tab. Note: This is no longer "Item Quantity".

- Press the **Save** icon.

If you want to submit additional information with this MAT-100, click on the **Remarks** icon. The **Remarks (General Remarks):** window will open.

- Enter any additional information within this window. Some examples are: “PC-1 attached, cast dates are:”, “Material Certificate is attached”, “Sample accompanies MAT-100, Request Proctor, etc.
- Click the **Remarks** icon again.
- Press the **Save** icon.

1-A105C-4 – Active Tab = Tests

Use the **Tests** tab when the material is concrete. (Currently, “Concrete Cylinder Test”, soon to be Concrete Class A, Class C, etc.

- Click on the **New** icon.
- Place the cursor over the white field in **Test Method** and right-click the mouse to perform a “search”.
- Single-click on **T22, Compressive Strength of Cylindrical Concrete Specimens**. Press **OK**.
- Enter the number **1** for **Sample Test Number**.
- Click on the **Save** icon. The information for Sample Test Number 1 will now appear.
- Click on **Services** and then **Enter/View Test Data** to enter the field test data.
- Enter the **Slump**, **Air Content Measure** and the **Concrete Temperature** measurements in the appropriate fields. Use the dropdown list for the **Units** for the **Slump** and **Concrete Temperature** measurements.

If you did not perform one of these tests, leave the field blank and enter the reason under **Remarks**.

- Click on the **Save** icon.
- Click on the **Specimens** tab
- Enter 1 for the **Specimen ID** and then the **Age of Cylinder**.
- Click on the **New** icon to enter the next **Specimen ID** and **Age of Cylinder**.
- Repeat for Specimen ID 3 and 4.

Note: 4 Specimens or cylinders need to be submitted to the LAB for each set. The **Specimen ID** should be 1, 2, 3 and 4. The **Age of Cylinder** will usually be 7, 14, 28 and 28 (test according to contract specifications).

Also, only enter information for the **Specimen ID** and the **Age of Cylinder**.

- Press the **Save** icon.
- Click on the **Close** button to go back to the **Tests** tab.

Note: You will only have to submit one MAT-100 for each set of cylinders. (Ex. C0001-0100C6001, the next set of cylinders will be C6002, etc.)

The final step in creating a MAT-100 is changing the **Status:** field to **Pending** from **Spaces**. This is accomplished by clicking the dropdown screen within the **Status:** field and choosing **Pending**.

- Press the **Save** icon.

1-A105D –Print a MAT-100

- From the Main Panel, double click the **Materials Management (+)** icon.
- Double click the **Process List** icon. The **Process List** window will open.

- Double click the "MAT1RPTA" under the **Process ID** heading (or "Generates MAT-100 for the selected samples" under the **Process Description** heading). The **Confirm Process Submission** window will open.
- Click on the **Subset** button. The **Select Subset** window will open.
- Select the MAT-100 that you want to print.

Note: You can print several at once if you select the MAT-100's by holding the Control key and choosing several different ones. However, you MUST choose the highest number MAT-100 first, and then select the MAT-100's in descending order. (Example: Select C0051-0251C0005 before selecting C0051-0251C0004)

- Press the **OK** button. The **Confirm Process Submission** window will re-open.
- Press the **Submit** button.
- A window opens stating, "Process MAT1RPTAA Submitted.". Click **OK**.
- A window opens stating, "Profile MAT1RPTAA for process MAT1RPTA has completed." Click **OK**.

The **Process List** window will open. y Click **Services** on the upper **Toolbar**. y Choose **Process Status**. The **Process Status** window will open (the **Regular** tab will be active).

- Double click the "MAT1RPTAA" choice under the **Process Name** heading. The **Files for Process MAT1RPTAA** window will open. y Double click the "Output.html" choice under the **Name** heading. The **Mat100 Hard Copy** window will open. y Choose the **Print** icon to print the report.

An external application called QuickPeek has been developed for use by the Department. MAT-100's may be printed in far less time by using this application. In order to print a MAT-100 using QuickPeek, these steps should be followed:

- Open QuickPeek and enter the contract number to get to the main interface.
- From the **Tools** menu, choose **View MAT-100**
- Enter the Sample ID, not including the project number. For example, Sample C0001-0001C0001 would simply be C0001
- A web browser will open displaying the MAT-100. Simply print this from the web browser.

This entire process should only take a few minutes. It should be noted that QuickPeek is presently unsupported and it is possible that it may not work with future versions of SiteManager.

Section Six – Construction Change Orders

1-A106 – Change Orders

<u>It is advisable to select your contract upon entering SiteManager:</u>

- Double click the **Contract Administration (+)** icon.
- Double click the **Contract Records (+)** icon.
- Double click the **Contracts** (or **Projects**) icon. The **Select Contract** window will open.
- Double click your appropriate **Contract ID**.

All **Change Orders** that you enter from this point will be related to your contract.

1-A106A – Create a Change Order

Note: For "No Item" Change Orders (Time Extension, Specification Change, etc.), refer to Section 1-A106E – "No Item" Change Order – "No Item".

- Click the **Main Panel** icon.
- Click the **Main Panel** tab.
- Click the **Change Orders (+)** icon.
- Double click the **Change Order Maintenance (+)** icon.
- Double click the **Header** icon. The **Header** window will open.

SiteManager will assign a **CO Number**.

- Enter information in the **Description:** field. For example: "Finalize item quantity.", "Routine qty adjustment based on field measurements."
- In the **Reason Code:** field, press the pull down and select and option.
- In the **CO Type:** field, press the pull down, and select "Supplemental Change Order".
- Click the box to add a check in the **Override Approval Rules** box.
- Click a box in the **Functions:** area based on the purpose of the Change Order.
- Press the **Save** icon.

The **Status:** field will be highlighted and in "Draft" mode.

- Close the window by clicking the **X** in the upper-right hand corner.

1-A106B – Change Order Items

- Click on the **SiteManager Panel** icon (the **Change Order Maintenance (+)** tab will be active).
- Double Click on the **Change Order Items** icon. The **Change Order Items** window will open. The **Change Order Item** tab will be active, and the **Change Order Item Description:** field will be highlighted.

1-A106B-1 – Adjust an Existing Contract Item

- Press the **Services** pull down menu.
- Select **New CO Item**. The **Select Contract Items** window will open.
- Double click the existing contract item to be adjusted. The **Change Order Items** window will re-open, and SiteManager will have filled in various fields associated with the contract item that is being adjusted.
- Enter a description. For example: "Routine qty adjustment.", or "Final quantity adjustment."
- Enter the quantity of the adjustment in the **This Change Order:** field under the **Quantity** column.
- Press the **Save** icon.

1-A106B-2 – Create a New Contract Item

Note: There are two Line Item Series utilized for creating a New Contract Item via a CO:

- 9000-Series Line Items correspond to Item Codes that begin with "CO". These are used when adding a brand new item to the contract that was not included in the project item bid list.

- 6000-Series Line Items correspond to items in the Department's Item Master List (Ex. 06010070, "Class S Concrete"). This series may ONLY be used to reallocate the same Item Code that was included at bid from one category to another. It is not intended add items from the Item Master List that were not included in the original bid.

Note: SiteManager will not allow a new CO item to be created unless “Extra Work” is selected in the **Functions** area in the **Header** window. Refer to **1-A106A – Create a Change Order** above for navigation.

With the **Change Order Items** window open, and the **Change Order Item** tab active, click the **New Contract Item** tab. The **New Contract Item** tab will be active, and several fields will need to be filled in.

- In the **Line Item Nbr:** field, enter the new item number. The first new item of a contract will be numbered “9001”. The next new item is “9002”, then “9003”, etc.
- Use the drop down arrow to select a project in the **Project Nbr:** field.
- Use the drop down arrow to select a category number in the **Category Nbr:** field.
- Right click the **Item Code:** field, and click “Search”. A **Search Window** will open. The available item codes are in order of the specification year.

Scroll through until the correct **Spec Year** and correct **Unit** are viewable.

Be advised that the critical elements are the **Item Code**, **Spec Year**, and the **Unit**. The **Short Description** will be entered later.

Also, the Project Manager must record the **Item Code**. Typically, Project Managers will list all new contract items somewhere in their files. The **Item Code** needs to be on this list next to the new item number. The reason is that the Project Manager must ensure that the same **Item Code** is not used for different items.

For example: under the “2000” **Spec Year**, and the “c.p.” **Unit**, there are 30 available **Item Codes**. The first is “CO01100” and the next is “CO01099”. The Project Manager may select the first code for the first cost-plus item created on a contract. When another cost-plus item is need, “CO01100” will still be available, but the Project Manager must not assign the same code for the second cost-plus item.

- Highlight the desired **Item Code**.
- Press **OK**. The **Change Order Items** window will reopen, with the **New Contract Item** tab active, SiteManager will have filled in several fields.
- Enter the **Unit Price:**
- Enter the **Proposal Line Nbr:** which is the same number as entered in the **Line Item Number:** field (9001, etc.).
- In the **Related Item:** field, used the dropdown menu for a selection.
- Enter the Item Description in **Supplemental Descriptions**:
- The **Critical:** and **Pay Plan Qty:** boxes remain unchecked.

The **Save** icon is inactive, so select the Change Order Item tab.

- Enter the **Change Order Item Description:** in UPPERCASE LETTERS. Only sixty (60) characters are allowed.
- Enter the item quantity in the **This Change Order:** field.
- Press **Save**.

To continue to create new items, press the **New** icon, and follow the same navigation.

- Close the window by clicking the **X** in the upper-right hand corner.

1-A106C – General Change Order Explanations

- Click on the **SiteManager Panel** icon (the **Change Order Maintenance (+)** tab will be active).
- Double Click on the **Change Order Explanations** icon. The **Change Order Explanations** window will open. The first pull down menu will default to **General Change Order Explanations**.

- Click the **New** icon. SiteManager will assign a **Seq. Nbr.** (sequence number), a **Type**, and the **Date Applied**. A new field will be added next to the words: **Pick Std Exp. ID or Enter Text Below**. Enter the name of the contract specifications in the large field. For example: "**Standard Specifications Form 81X and Supplemental Specifications dated July, 200X.**"
- Press the **Save** icon.

1-A106D – Specific Change Order Explanations

Every Change Order item, whether new or existing, needs to be associated, or classified, under two explanations. First, all items are to be associated with a **Standard Explanation**. They are: "Unforeseen Conditions", "Change in Scope", "Contract Revisions", "Quantity Adjustments", "Other Adjustments", and "Time Extension". Second, each item needs to be associated with an **Entered Text**. The text will explain why the adjustment is required, and list back-up correspondence.

Note: For additional information regarding **Standard Explanations** please refer to Memorandum "Standard Paragraph Explanations (Formerly Paragraph Explanations) from Mark D. Rolfe dated April 13, 2007.

1-A106D-1 – Standard Explanations (Specific Items)

- Press the arrow for the pull down menu in the field that says "**General Change Order Explanations**."
- Select **Explanations Applied to Specific Items**.

A new field will appear to the right of the existing ones. It will list all of the items that were entered in the **Change Order Items** window.

- Click the **New** icon. SiteManager will assign another **Seq. Nbr.** (sequence number), a **Type**, and the **Date Applied**.
- Right click the new field next to the words: **Pick Std Exp. ID or Enter Text Below**.
- Click **Search**. The **Search Window** opens.
- Highlight the desired **Explanation ID**.
- Click **OK**.

The **Search Window** will close, and the **Change Order Explanations** window will be open. The **Explanation ID** that was selected will be in the field, and the **Explanation Text** will be in the large field (which will now be gray).

- Double click (to the left of the **Project** column) all of the items that fall under that explanation.
- Press the **Save** icon.

If another **Standard Explanation ID** is required, it needs to be added next:

- Click the **New** icon. SiteManager will assign another **Seq. Nbr.** (sequence number), a **Type**, and the **Date Applied**.
- Right click the new field next to the words: **Pick Std Exp. ID or Enter Text Below**.
- Click **Search**. The **Search Window** opens.
- Highlight the next desired **Explanation ID**.
- Click **OK**.

The **Search Window** will close, and the **Change Order Explanations** window will be open. The **Explanation ID** that was selected will be in the field, and the **Explanation Text** will be in the large field.

- Double click all of the items that fall under that explanation.

- Press the **Save** icon.

Note: Every CO item must have at least one explanation. Repeat this navigation until all items have explanations applied.

1-A106D-2 – Standard Explanations (All Line Items)

- Press the arrow for the pull down menu in the field that says "**General Change Order Explanations**."
- Select **Explanations Applied to All Line Items**.
- Click the **New** icon. SiteManager will assign another **Seq. Nbr.** (sequence number), a **Type**, and the **Date Applied**.
- Right click the new field next to the words: **Pick Std Exp. ID or Enter Text Below**.
- Click **Search**. The **Search Window** opens.
- Highlight the desired **Explanation ID**.
- Click **OK**. The **Search Window** will close, and the **Change Order Explanations** window will be open. The **Explanation ID** that was selected will be in the field, and the **Explanation Text** will be in the large field (which will now be gray).
- Press the **Save** icon.

1-A106D-3 – Specific Text Explanations (Specific Items and All Line Items)

Explanations associated with specific item adjustments are entered next. These explanations will be in the **Addendum** section on the change order printout. As an alternative to creating the addendum in this fashion, it is preferred that users create an attachment in Microsoft Word. Using MS Word allows greater flexibility when creating documents and includes the benefit of customized formatting and a spell check application. The instructions for creating an attachment follow the instructions on creating the addendum within SiteManager. <u>It is highly recommended that users attach their addendum using an external word processing application rather than the internal explanations module. Future versions of Site Manager may include better formatting options and spell check applications, however at this time, the best option is to create an addendum outside of Site Manager.</u>

To create an addendum using the Site Manager Module:

- Click the **New** icon.
- SiteManager will assign another **Seq. Nbr.** (sequence number), a **Type**, and the **Date Applied**.
- With a particular item (or items) in mind, enter information in the large white field explaining the required adjustment. Refer to the following example for the proper format:
  **Line Item 0010 – Increase item quantity. Additional sawcutting is required to construct the roadway according to the staging plans.

**
  **See attached correspondence:
**
  **3a 05-14-04 Letter from Mr. Construction Co. Supervisor to Mr. Project Engineer
**
  **3b 06-21-04 Meeting minutes

**

<u>NOTES / TIPS</u>

- ❖ Always begin with the words "Line Item", and then list the line item number or numbers.
- ❖ The "
" stands for "break return", which is required for a return between printed lines.
- ❖ The "

" gives two returns if an additional space is desired.
- ❖ FYI: "<bp>" stands for "break page", and can be used if a page break is needed.
- ❖ The "
" will not be printed out on the actual Change Order Report (Portrait), but does print out on the Change Order Report (see Section 1-A106G below).

- ❖ When assigning a label to an attachment, the number corresponds to the Seq. Nbr. that was assigned by SiteManager.
- ❖ The oldest attachment is listed first.
- ❖ Attachment descriptions should be concise. Names are to be used if applicable.

- Double click all of the items that correspond to that explanation. If you select Standard Explanations applied to **All Line Items**, the list of the items will not appear.
- Press the **Save** icon.

<u>To continue adding explanations that are to appear in the **Addendum**, repeat the navigation:</u>
- Click the **New** icon. SiteManager will assign another **Seq. Nbr.** (sequence number), a **Type**, and the **Date Applied**. With another particular item (or items) in mind, enter information in the large white field explaining the required adjustment.
- Double click all of the items that correspond to that explanation (explanations for **All Line Items** will NOT have items listed).
- Press the **Save** icon.
- Close the window by clicking the **X** in the upper-right hand corner.

To create an addendum in an external application and attach it so SiteManager
- Navigate to the Change Order Header
- Choose the attachment Icon and then the OLE icon, or select Service – Attachments – New – OLE from the menu

- The Insert Object window will then appear. Scroll down the list of choices and select Microsoft Word Document, then click OK
- The OLE attachment window will open. Here is where the document name will be entered as well as other information.
  - o In the **Name** field, choose and appropriate name, such as CO 001 Addendum
  - o Enter a description in the text area if desired, although it is not necessary
  - o In the section labeled **Attachment Security**, select the group levels that are allowed to open and review the attachment. If **Add All** is selected, then all users in SiteManager can view the document. At least one level must be selected.
  - o Click on the **Add** button.
- The OLE attachment will now be added and selectable in the window. To access the attachment, simply double click on it. This will open Microsoft Word and allow the Addendum to be created. When finished creating the addendum, hit the **Save** icon or choose **Save** from the file menu. Do not change the file name as SiteManager has already assigned the name and uses that for its reference.
- <u>The Addendum must be printed from MS Word. It will not be printed when the actual CO is printed from SiteManager.</u>

The option to create an addendum locally, without creating the attachment in Site Manager is also available; however please remember to include that file with your Change Order when you submit it to your Project Engineer.

1-A106E – "No Item" Change Order

Some Change Orders do not require item quantity adjustments; for example: Time Extension, or Specification Change. These types of Change Orders have no items, so all descriptions and back-up information needs to be recorded in the **General Change Order Explanations** section of the Change Order.

It is advisable to select your contract upon entering SiteManager:

- Double click the **Contract Administration (+)** icon.
- Double click the **Contract Records (+)** icon.
- Double click the **Contracts** (or **Projects**) icon. The **Select Contract** window will open.
- Double click your appropriate **Contract ID**.

All **Change Orders** that you enter from this point will be related to your contract.

1-A106E-1 – Header

- Click the **Main Panel** icon.
- Click the **Main Panel** tab.
- Click the **Change Orders (+)** icon.
- Double click the **Change Order Maintenance (+)** icon.
- Double click the **Header** icon.
- The **Header** window will open.

SiteManager will assign a **CO Number**.

- Enter information in the **Description:** field. For example: "Time Extension", or "Change of method of measurement for…"
- In the **Reason Code:** field, press the pull down and select and option.
- In the **CO Type:** field, press the pull down, and select "Supplemental Change Order".
- Click the box to add a check in the **Override Approval Rules** box.
- In the **Functions:** area, click the applicable box(es).
- Press the **Save** icon.

The **Status:** field will be highlighted and in "Draft" mode.

Close the window by clicking the **X** in the upper-right hand corner.

1-A106E-2 – Change Order Explanations

- Click on the **SiteManager Panel** icon (the **Change Order Maintenance (+)** tab will be active).
- Double Click on the **Change Order Explanations** icon. The **Change Order Explanations** window will open. The first pull down menu will default to **General Change Order Explanations**.

Note: The three required explanations for a "No Item" Change Order will be included in the **General Change Order Explanations** category.

- Click the **New** icon.

SiteManager will assign a **Seq. Nbr.** (sequence number), a **Type**, and the **Date Applied**. A new field will be added next to the words: **Pick Std Exp. ID or Enter Text Below**.

- Right click the new field next to the words: **Pick Std Exp. ID or Enter Text Below**.
- Click **Search**. The **Search Window** opens.
- Highlight the desired **Explanation ID** (Time Extension, Quantity Adjustments, etc.).
- Click **OK**.
- Press the **Save** icon.

- Click the **New** icon.

SiteManager will assign the second **Seq. Nbr.**, a **Type**, and the **Date Applied**.

Describe the purpose of the Change Order. Refer to the following examples for the proper format:

> **In accordance with Article 1.08.08 of the Standard Specifications Form 814A, the Contractor is granted a time extension of 62 days for various incidental extra work. The completion date is revised from July 29, 2003 to September 29, 2003.**
>
> **Change Method of Measurement (from Metric Tonnes to calculated in place) for the item "Processed Aggregate Base" in accordance with Form 815, Section 1.09.**

- Press the **Save** icon.
- Click the **New** icon.

SiteManager will assign the third **Seq. Nbr.**, a **Type**, and the **Date Applied**.

Required back-up will be listed in this section along with a reiteration of the description from the second sequence. Refer to the following examples for the proper format:

> **In accordance with Article 1.08.08 of the Standard Specifications Form 814A, the Contractor is granted a time extension of 62 days for various incidental extra work. The completion date is revised from July 15, 2003 to September 15, 2003.

**
> **See attached correspondence:

**
> **1a January 14, 2004 Time Extension Report Change Method of Measurement (from delivered Metric Tonnes to calculated in place) for the item "Processed Aggregate Base" as approved by Office of Construction in a memorandum dated March, 22, 2004.**
> **See attached correspondence:**
> **1a March 17, 2004. Memorandum from District Engineer to Construction Administrator**
> **1b March 22, 2004. Memorandum from Construction Administrator to District Engineer**

1-A106F – Change Order Approval

Note: Before you approve the change order, print the draft copy to review.

- Click on the **SiteManager Panel** icon (the **Change Order Maintenance (+)** tab will be active).
- Double Click on the **Header** icon.

The **Header** window will re-open.

- Press the pull-down menu in the **Status:** field, and select "Pending".
- Press the **Save** icon.
- The **AASHTO SiteManager** window will open, confirming the change in status. Click **Yes**. The **Change Order #000 Approval** window will open.
- Click the **New** button. SiteManager will assign a **Seq. No.**, and the line will be highlighted.
- Click the pull down menu under the **Groups for Approval** column.
- Scroll down, and select "Project Engineer".
- Click the pull down menu under the **User ID** column.
- Scroll down, and select your Project Engineer's name.
- Click the **New** button.

SiteManager will assign another **Seq. No.**, and the line will be highlighted.

- Click the pull down menu under the **Groups for Approval** column.

- Scroll down, and select "District Finals".
- Click the pull down menu under the **User ID** column.
- Scroll down, and select the name of the office staff who reviews COs.
- Click the **New** button.

SiteManager will assign another **Seq. No.**, and the line will be highlighted.

- Click the pull down menu under the **Groups for Approval** column.
- Scroll down, and select "Supervising Engineer".
- Click the pull down menu under the **User ID** column.
- Scroll down, and select the name of your Supervising Engineer.
- Click the **OK** button.
- The **AASHTO SiteManager** window will open, informing you that mail has been sent. Click **OK**.

Your Project Engineer will be notified of the pending CO through the SiteManager Mail Box.

1-A106G – Change Order Reports

- Click on the **SiteManager Panel** icon (the **Change Order Maintenance (+)** tab will be active).
- Double Click on the **Change Orders(+)** tab.
- Double Click on the **Process List** icon. The **Process List** window will open.
- Double click "COKADK". The **Confirm Process Submission** window will open.
- Click the **Subset** button. The **Select Subset** window will open.
- Highlight the Change Order to be printed.
- Press **OK**. The **Confirm Process Submission** window will re-open.
- Click the **Parameters** button. The **Process Submission Parameters** window will open.
- Press **OK**. The **Confirm Process Submission** window will re-open.
- Press the **Submit** button.
- A window opens stating, "Process COKADKA submitted.". Click **OK**.
- A window opens stating, "Profile COKADKA for process COKADK has completed". Click **OK**. The **Process List** window will re-open.
- Click **Services** on the upper **Toolbar**.
- Choose **Process Status**. The **Process Status** window will open (the **Regular** tab will be active).
- Double click the "COKADKA" choice under the **Process Name** heading. The **Files for Process COKADKA** window will open.

- Double click the "Output.html" choice under the **Name** heading. The **Change Order Report** window will open.
- Press the **Print** icon to print the report.
- <u>Attach this report to your CO Routing Slip.</u>

Section Seven – Labor Wage Checks

1-A107 – Labor Wage Checks

<u>Please note:</u> **The information contained in this section is considered optional. We presently do not require this information to be entered into SiteManager. If the user would rather keep an electronic record in the Volume IV then please use the following guide, however a hand written record in the Volume IV is acceptable.**

<u>It is advisable to select your contract upon entering SiteManager:</u>

- Double click the **Contract Administration (+)** icon.

- Double click the **Contract Records (+)** icon.
- Double click the **Contracts** (or **Projects**) icon. The **Select Contract** window will open.
- Double click your appropriate **Contract ID**.

All **Labor Wage Checks** that you enter from this point will be related to your contract.

1-A107A – Enter new Labor Wage Checks

- Click the **Main Panel** icon.
- Click the **Main Panel** tab.
- Double click the **Contract Administration (+)** icon.
- Double click the **Contractor Management (+)** icon.
- Double click the **Document Submission** icon. The **Document Submission** window will open.

If you began this section by selecting the contract as listed above, the contract number will be listed within the **Contract ID:** field. Also, the next **Document** will be listed in sequential order within the **Document Serial No:** field.

Enter information in the listed fields as follows:

- **Contract ID:** As with other aspects of SiteManager, grayed areas are non-enterable.
- **Document Serial No.:** As with other aspects of SiteManager, grayed areas are non-enterable.
- **Submitted By:** Enter the name of the inspector/consultant by using your SiteManager user ID that took the **Labor Wage Check.**
- **On:** Manually input the six-digit date.
- **Document Type**: Choose the following document type from the dropdown screen: "CON-131 Labor Wage Check Form".
- **Document Category:**Choose the following document category from the dropdown screen: "EEO/DBE/OJT/SBE".
- **Description:** Enter the **Labor Wage Check** information according to the following format: "Employee Name", "Contractor's Name". "Complies to wage requirements" – if the Contractor complies. "Does NOT comply to wage requirements, ConnDOT District EEO officer notified" – if the Contractor does not comply.
- Press the **Save** icon.

To enter additional **Labor Wage Checks**, Press the **New** icon and repeat the above navigation.

1-A107B – Modify or check an existing Labor Wage Check

- From the Main Panel, double click the **Change Orders (+)** icon.
- Double click the **Contract Administration (+)** icon.
- Double click the **Document Submission** icon. The **Document Submission** window will open.

If you began this section by selecting the project as listed above, the contract number will be listed within the **Contract ID:** field. Also, the next **Document** will be listed in sequential order within the **Document Serial No:** field.

- Press the **Open** icon. The **Document Submitted Select** window will open.
- Double-click on the selected **Document S. No:** The **Document Submission** window will open with the requested **Document** active.

After any modifications are made to the **Document**, press the **Save** icon.

Section Eight – Contractor Payrolls

1-A108 – Certified Payrolls

<u>Please note:</u> The information contained in this section is considered optional. We presently do not require this information to be entered into SiteManager. If the user would rather keep an electronic record in the Volume IV then please use the following guide, however a hand written record in the Volume IV is acceptable.

<u>It is advisable to select your contract upon entering SiteManager:</u>

- Double click the **Contract Administration (+)** icon.
- Double click the **Contract Records (+)** icon.
- Double click the **Contracts** (or **Projects**) icon. The **Select Contract** window will open.
- Double click your appropriate **Contract ID**.

All **Certified Payrolls** that you enter from this point will be related to your contract.

- Click the **Main Panel** icon.
- Click the **Main Panel** tab.
- Double click the **Contract Administration (+)** icon.
- Double click the **Contractor Management (+)** icon.
- Double click the **Contractor Payrolls** icon. The **Contractor Payrolls** window will open.

If you began this section by selecting the contract as listed above, the contract number will be listed within the **Contract ID:** field. Otherwise, enter your contract number.

- Press the **Services** dropdown menu.
- Select **Choose Keys**. The **Select Payroll for Vendor** window opens.
- Double click the **Vendor Full Name**. The **Contractor Payrolls** window will reopen with the selected **Vendor ID:** field filled in.
- Enter the correct date in the **Payroll Received:** field.
- Enter the correct date in the **For Period Ending:** field.
- Press the **Save** icon. The **AASHTO SiteManager** window reopens stating "Payroll Date reset according to the Payroll frequency of the Prime"
- Press **OK**.

1-A108A – Enter Certified Payrolls for the Same Contractor

- Press the **New** icon.
- Enter the correct date in the **Payroll Received:** field.
- Enter the correct date in the **For Period Ending:** field.
- Press the **Save** icon. The **AASHTO SiteManager** window reopens stating "Payroll Date reset according to the Payroll frequency of the Prime"
- Press **OK**.

1-A108B – Enter Certified Payrolls for a Different Contractor

- Press the **Services** dropdown menu.
- Select **Choose Keys**. The **Select Payroll for Vendor** window opens.
- Double click the **Vendor Full Name**. The **Contractor Payrolls** window will reopen with the selected

Vendor ID: field filled in.

- Enter the correct date in the **Payroll Received:** field.
- Enter the correct date in the **For Period Ending:** field.
- Press the **Save** icon. The **AASHTO SiteManager** window reopens stating "Payroll Date reset according to the Payroll frequency of the Prime"
- Press **OK**.

It should be noted that there are several tabs on the Payroll entry section of the Civil Rights area in SiteManager. Should the user wish to enter additional information, they have the option of choosing the Employee Information tab or the Employee Daily Information tab. Care should be used when entering this information.

For example: The Employee Information tab allows for individual employee information to be entered. All fields are required in order for the record to be saved. **UNDER NO CIRCUMSTANCES SHOULD THE EMPLOYEES ACTUAL SOCIAL SECURITY NUMBER BE ENTERED ON THIS SCREEN.** Please use a "dummy" or fictional nine digit number in this space. Social Security Numbers are required to accompany certified payrolls on Federal participating contracts. SSN are to be kept confidential at all times and not made immediately available for public viewing. (Refer to Volume I, Chapter 12 concerning certified payrolls and SSN). It is possible to enter the same number in the SSN field for multiple employees so there should not be a conflict with entering something as simple as 123-45-6789, for example.