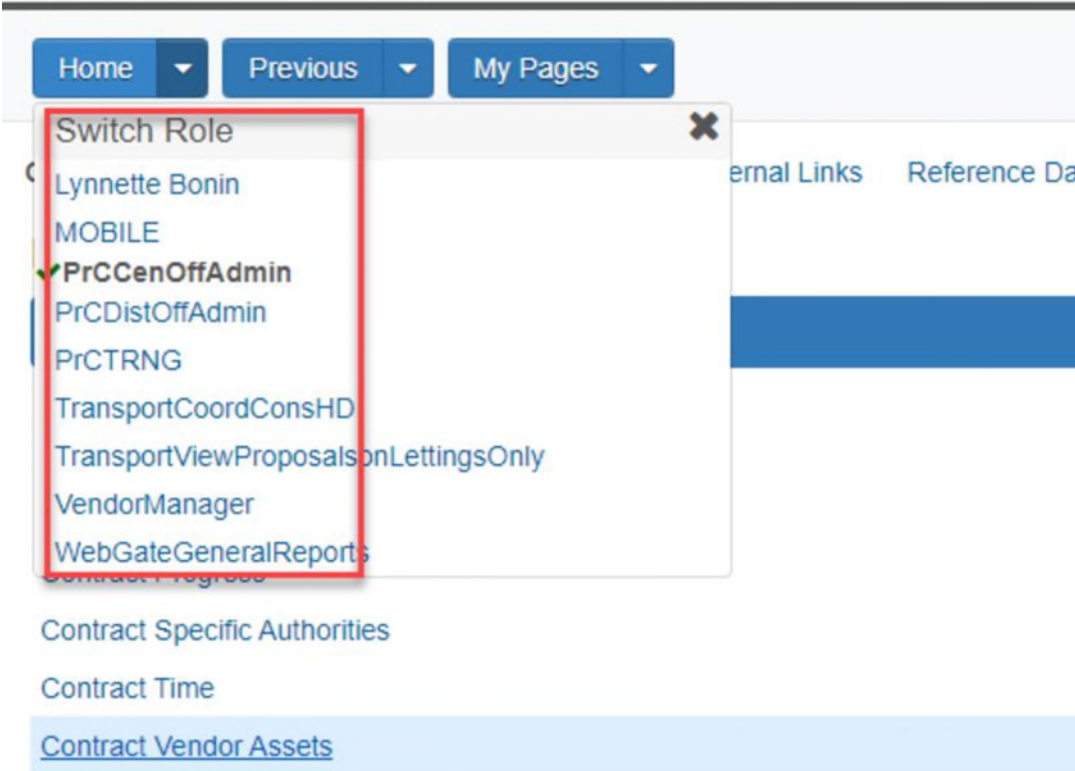


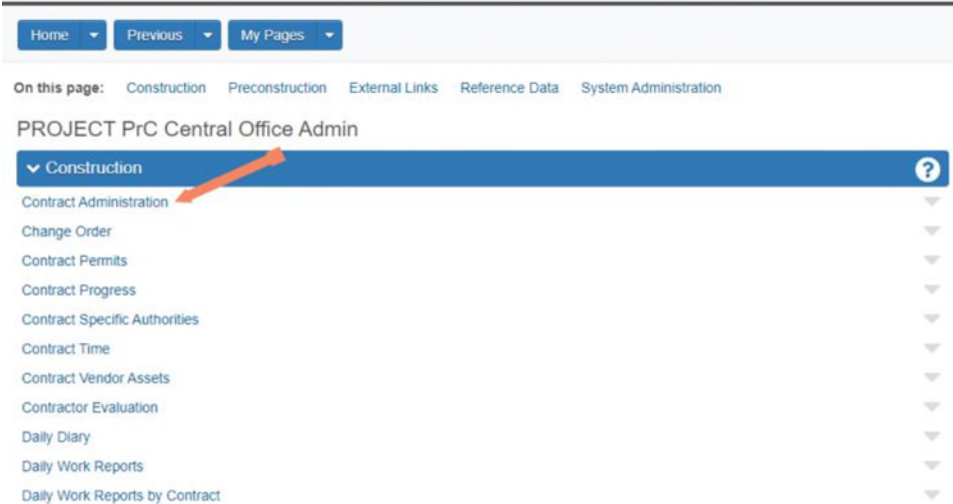
Creating a Stockpile

Creating a Stockpile

1. Open PrC **Choose Production PrC if you are creating a new stockpile on your contract. Choose PrC Systest if you are training or testing construction stockpile.
2. On the Home page, choose the correct role:



3. On the Home page, choose contract administration:



Creating a Stockpile

4. On the Contract Administration Overview page, input your contract id:

Home Previous My Pages

Contract Administration Overview

Contract Administration Overview

Search: Advanced Showing 2 of 2 Primary District ID: No Filter

Contract	Description
T2830	SR243(INTRNL AIRPORT BLVD) FROM I-295(SR9A) TO SR102(AI
TRN0A	InfoTech Training SR 10A (US 90)

5. Select Contract Progress:

6. Select Construction Stockpile:

Home Previous My Pages

Progress Overview **Construction Stockpile** Contract Administration Contract Documentation Items

Contract Progress Summary

Contract: TRN0A - InfoTech Training SR 10A (US 90)

General

Financials

Change Orders

Contractors

Daily Work Reports

Diaries

Diary Adjustments

Primary PCN: TR0A6915201

Contract ID: TRN0A

Description:

7. Click the drop down on the right of the 'save' button and select 'add':

Home Previous My Pages

Contracts Construction Stockpile Review Contract Administration Contract Documentation Contract Progress Items Projects Subcontracts

Construction Stockpile Overview

Contract: TRN0A - InfoTech Training SR 10A (US 90)

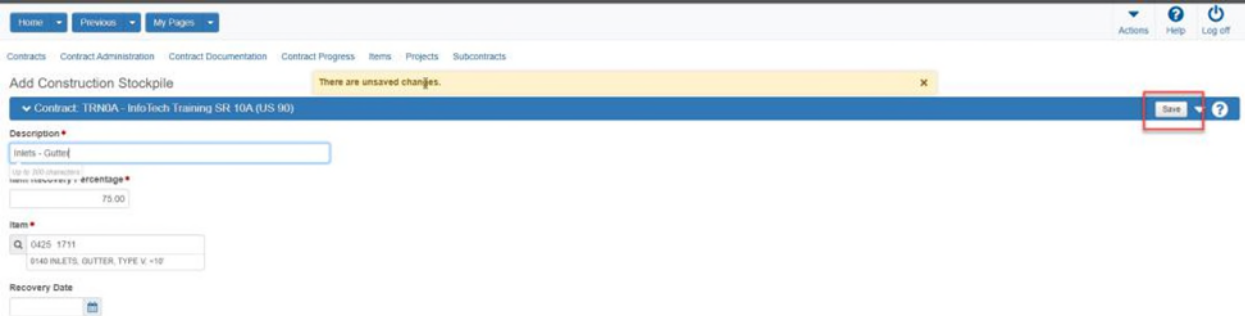
Search: Type search criteria or press Enter Advanced Showing 2 of 2

Contract Stockpile ID	Descr	Item	Material Name	Status
0002	Stockpile 10A/2002	0140-0425 1111-INLET76 GUTTER TYPE V-107	Q	Open
0001	Test	0170-0010 11-PIPE HANDRAIL-GUARDRAIL ALUMINUM	Q	Active

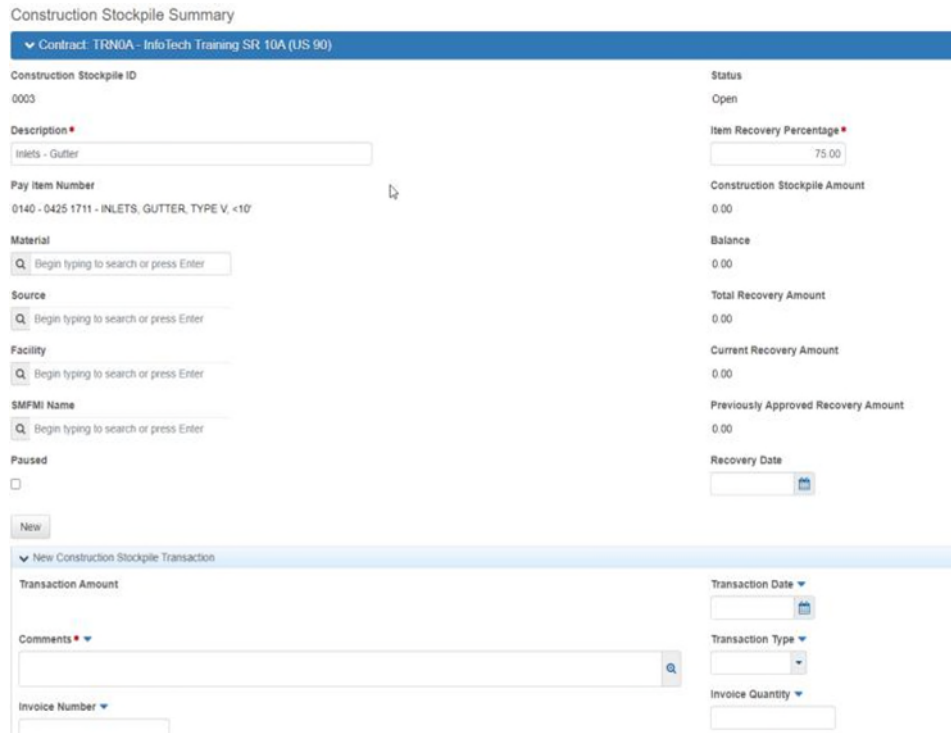
Actions: Add

Creating a Stockpile

- 8. On the Add Construction Stockpile page:
 - a. Enter a description.
 - b. Enter the Item Recovery Percentage. This is the contract item percent complete for which the construction stockpile amount will have been fully recovered. This is not the stockpile allowance percentage from Specification 9-5. **Entering 100.00 is recommended.** Decreasing the percentage will recover the stockpile amount at an increased rate. Enter the percentage as a **whole number (75 NOT .75** – entering as .75 will change the percentage value and skew the stockpile).
 - c. Enter the item. *Tip: you can input one or two characters of the pay item number and a list will populate for you to choose your stockpile from the available pay items. Once the information is input, click 'save'.



- d. After clicking save, the page is redirected to the Construction Stockpile Summary:



Creating a Stockpile

- 9. On the Construction Stockpile Summary page, input data into 'Comments' located on the lower half of the page. Additionally, select the drop-down menu for 'item' and select the item number. In the 'Construction Stockpile Amt' field, enter the invoice amount allowable per Specifications 9-5. Enter a recovery date in the field 'Recovery Date'. Once the data is input, click 'Save' located on the upper right side of the page. *Note: Invoice Number, Invoice Date, Invoice Quantity, and Invoice Description are for record purposes only and are not required, but input is recommended.

The screenshot shows the 'Construction Stockpile Summary' page. At the top left, there is a search bar for 'SMFMI Name' and a 'Paused' checkbox. To the right, the 'Previously Approved Recovery Amount' is 0.00, and the 'Recovery Date' is 05/31/2023. Below this is a table with columns: Transaction Type, Transaction Amt, Transaction Dt, Current = Bid + CO Quantity, and Unit Price. The table contains one row with Transaction Num 000000001, Transaction Amt 2,500.00, Transaction Dt 10/11/2022, Current = Bid + CO Quantity 1.000, and Unit Price 5,518.30000. Below the table, there are fields for Transaction Amount (2,500.00), Transaction Date (10/11/2022), Transaction Type, Invoice Number, Invoice Date, and Invoice Description. The 'Project Item Distribution' section is expanded, showing an 'Item' dropdown menu with the selected item '0045 - TR0A6915202 - 0200', a 'Constr Stockpile Amt' field with the value '2,500.00', and a 'Fund Package ID' field with the value 'PART'. Red boxes highlight the 'Recovery Date' field, the 'Comments' field (containing 'test data'), the 'Item' dropdown menu, and the 'Constr Stockpile Amt' field.

Note: The Stockpile will automatically pay the initial stockpile payment on the next estimate. As installation for the pay item is approved on the Daily Work Report, PrC will automatically recover the corresponding stockpile amount by creating a System-Generated line item adjustment to reduce stockpile balance.

- 10. Create an estimate to pay the stockpile.

Creating a Stockpile

- To add Stockpile to the contract, go to the Stockpile Transaction. Click the down arrow to the right of the transaction and select 'Duplicate Row.'

The screenshot shows a software interface for managing stockpile transactions. At the top, there are several input fields: Description, Vendor, Pay Item Number (0130 - 0415 1 1 - REINFORCING STEEL-ROADWAY), Material, Source, Facility, SMPFM Name, and Paused. On the right side, there are summary fields: Open, Item Recovery Percentage (75.00), Construction Stockpile Amount (7,500.00), Balance (7,500.00), Total Recovery Amount (0.00), Current Recovery Amount (0.00), Previously Approved Recovery Amount (0.00), and Recovery Date (01/01/2023). Below these is a table with columns: Transaction Type, Transaction Amt, Transaction Dt, Current = Bid + CO Quantity, Unit Price, and Comments. The table contains three rows of transactions. A dropdown menu is open for the first row, with 'Duplicate Row' highlighted in red. Other options include 'Delete', 'Edit Row', 'Views', 'Attachments (0)', 'Links', and 'Tracked Issues'.

This will duplicate the transaction that you selected and add it to the transaction window. Pay attention to the Construction Stockpile Amount and the Balance. When you add the stockpile, the value will increase. All the fields noted in the screen shot below can be changed to reflect the correct dates and comments. Additionally, the Item field and the Constr Stockpile Amt field are required to be updated with data input:

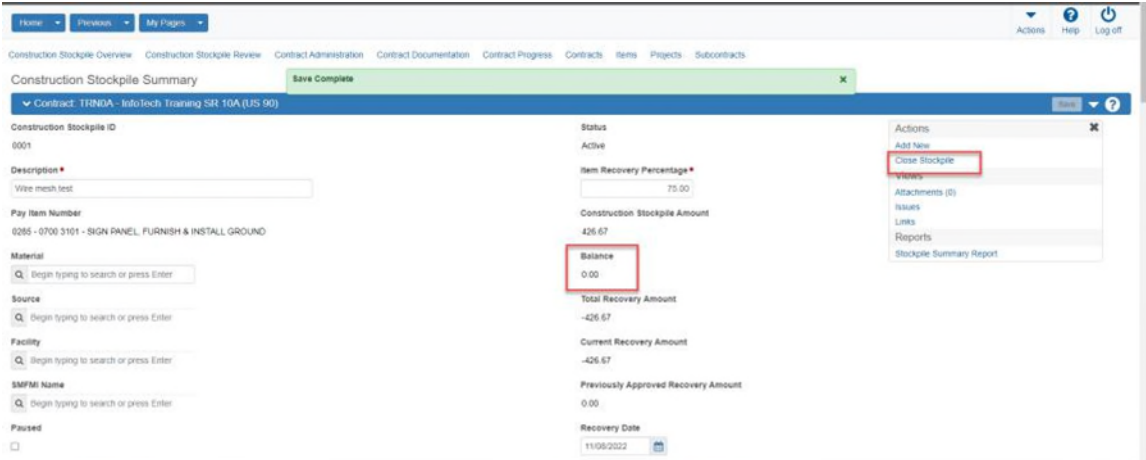
This screenshot shows a detailed view of a transaction. The top section displays a table with columns: Transaction Type, Transaction Amt, Transaction Dt, Current = Bid + CO Quantity, Unit Price, and Comments. Below this is a form with several fields: Transaction Amount (2,500.00), Comments (Rebar for approach slabs), Invoice Number (BR549), Invoice Date (11/09/2022), Transaction Date (11/09/2022), Transaction Type (STMI - Stockpile Material Initial Payment), Invoice Quantity, and Invoice Description (Rebar for approach slabs on the two bridges in Gadsden Co.). At the bottom, there is a 'Project Item Distribution' table with columns: Item, Constr Stockpile Amt, and Fund Package ID. The 'Item' field is highlighted with a red box, and the 'Constr Stockpile Amt' field is also highlighted with a red box. Red arrows point to the Transaction Date, Transaction Type, Invoice Number, Invoice Date, Item, and Constr Stockpile Amt fields, indicating they need to be updated.

The Constr Stockpile Amt field is the field that will need the additional value input. The Item field should pre-populate with the original values captured in the duplication of the row. Once you are satisfied with your data inputs, click the 'Save' button at the top right of the screen. Once the transaction is saved, you can check the Construction Stockpile Amount and Balance fields to verify stockpile has been added. The values in the fields should increase by the value entered into the Constr Stockpile Amt field in the transaction.

*The stockpile will automatically close when the balance is zero.

Creating a Stockpile

- 12. To close an active stockpile that has a balance, create a new transaction, and select 'Type' 'STMC-Stockpile Closure'. Enter the balance remaining as a negative amount. Save Transaction to remove the remaining balance. Select 'Close Stockpile' from the Component Actions menu. The system changes the stockpile Status to Closed and displays a message to confirm that your changes were saved. **Closed stockpiles will recover the funds for the stockpile without an associated installation, and additional transactions cannot be created.**



Updates:
6/28/2023 – Revised instructions for 'Item Recovery Percentage' and definition.
Updated instructions on how to close a stockpile transaction.