Construction Contracts Training Guide for FDOT Staff

Florida Department of Transportation

AASHTOWare Project Construction & Materials™

Version 4.6

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Table of Contents

Getting Started

Introduction

Web-based AASHTOWare Project™ software is a complete, enterprise-wide solution developed by the American Association of State Highway and Transportation Officials (AASHTO) for managing a transportation agency's construction program. It utilizes web-based information systems technology and is based on the experience and needs of AASHTO's member agencies. Web-based AASHTOWare Project software capabilities encompass the full functionality of a construction contract management system. Beginning with cost estimation, web-based AASHTOWare Project software carries through with proposal preparation, bid-letting, construction and materials management, civil rights and labor compliance activities, and historical data collection and analysis. The system creates a consistent and integrated view of the construction contract process during each of the phases.

AASHTOWare Project Estimation™ is a web-based estimation application designed to deliver accurate, reliable cost estimates for your construction program. Cost estimates enable you to estimate the anticipated costs of an improvement as it progresses through different stages of planning, from a conceptual estimate when minimal scope exists, to a preliminary estimate when detail items can be determined for the project, and finally to a letting estimate associated with a proposal. Each concept, project, and proposal can be associated with multiple cost estimates, enabling you to evaluate different methodologies and pricing scenarios as needed.

AASHTOWare Project Preconstruction™ manages the project life cycle from project design, through producing an estimate, to preparing a proposal for prospective bidders, to contract award. It also manages notifying contractors, maintaining planholder information, managing bid lettings, analyzing bids, and producing letting summary reports.

AASHTOWare Project Construction & Materials™ is a web-based module that covers the complete construction and materials management process, managing contract information through the entire construction cycle, including contract status reporting, progress payments, DBE reporting, subcontractor authorization, funding participation allocation, laboratory information management functionality, and project finalization management.

AASHTOWare Project Civil Rights & Labor™ is a comprehensive web-based application that allows agencies to receive and process the data required to meet federal and state requirements for civil rights and labor compliance activities, such as federal reporting, disparity studies, and data analysis (for example, payrolls). AASHTOWare Project Civil Rights & Labor also allows for the effective administration of an agency's external civil rights and labor compliance activities such as contractor payrolls and labor compliance, wage decisions, Disadvantaged Business Enterprise (DBE) certification, vendor data management, DBE commitments, On-the-Job Trainees (OJT) tracking and monitoring, subcontractor data and prompt payment tracking, bidder/quoter submittals, and trucking types and tracking.

This training guide provides detailed information about using the construction functionality of the AASHTOWare Project Construction & Materials application, along with general information about the web-based AASHTOWare Project system.

Please note that depending on the roles you are assigned, you may not have access to all the functionality shown in this training guide.

Overview of Getting Started

The Getting Started section describes how to use features in web-based AASHTOWare Project to complete basic tasks. Carefully review these topics to make your first experiences with the software easier and more intuitive.

Using the Correct Browser

In the Florida Department of Transportation (FDOT) training class, you will use Google Chrome because you don't have change any browser settings to use Google Chrome with web-based AASHTOWare Project. If you would like to use Internet Explorer or Microsoft Edge, please refer to the appendix for instructions on how to make changes to the browser settings.

Logging On

AASHTOWare Project is a web-based application. Start AASHTOWare Project by opening a web browser and entering the address of the program.

Note: FDOT will provide your username, password and the website link for AASHTOWare Project.

Figure 1. Logging On

Instructions 1

To log on to AASHTOWare Project:

1. In your browser, navigate to the **AASHTOWare Project** web address supplied by FDOT.
2. In the **Username** field, type your username. **(Use your network username)**

   The username is not case sensitive.

3. In the **Password** field, type your password. **(Use your network password)**
4. In the **Domain** field, click the drop-down arrow and select the appropriate domain. **(Use the default domain DOT)**
5. Click the **Log on** button.

Navigating in Web-Based AASHTOWare Project

Web-based AASHTOWare Project components and webpages include a variety of features to help you navigate more easily through the system. The features described in this section are standard throughout the system.

Dashboard	When you log on to the system, the software opens on the dashboard. You can also go to the dashboard at any time by clicking the Home button on the Menu bar. The dashboard contains one or more components. Each component is identified by a title set within a header bar. Each component provides access to the information and processes required for a specific area of FDOT's work.
Menu bar	The system displays the Menu bar at the top of every webpage in the system. The buttons and menus on this bar help you to move quickly through the system to visit the pages and components you use most often.
Quick Links	Quick links are displayed below the Menu bar and above the webpage title. These links allow you to quickly jump to application pages related to the current page.
Hypertext Links	Hypertext links can be located anywhere on an application component or webpage and are identified by underlined text. When clicked, a link takes you to another component or page, usually one containing more detailed information than what is available in the current component.
Icons	Icons are small images throughout the system that either convey information or can be clicked to perform an action. For example, a red asterisk icon indicates a required field. An eraser icon in a Quick Find search box can be clicked to reset search criteria.
Alternate Paths	Keep in mind that all of the various navigational elements, such as hypertext links, quick links, previous pages, and Actions menus, can all provide different ways of accomplishing the same task. The same command might be accessible from an Actions menu or as a link.
Bookmarks	You can bookmark specific pages in the software just as you would for any other website.

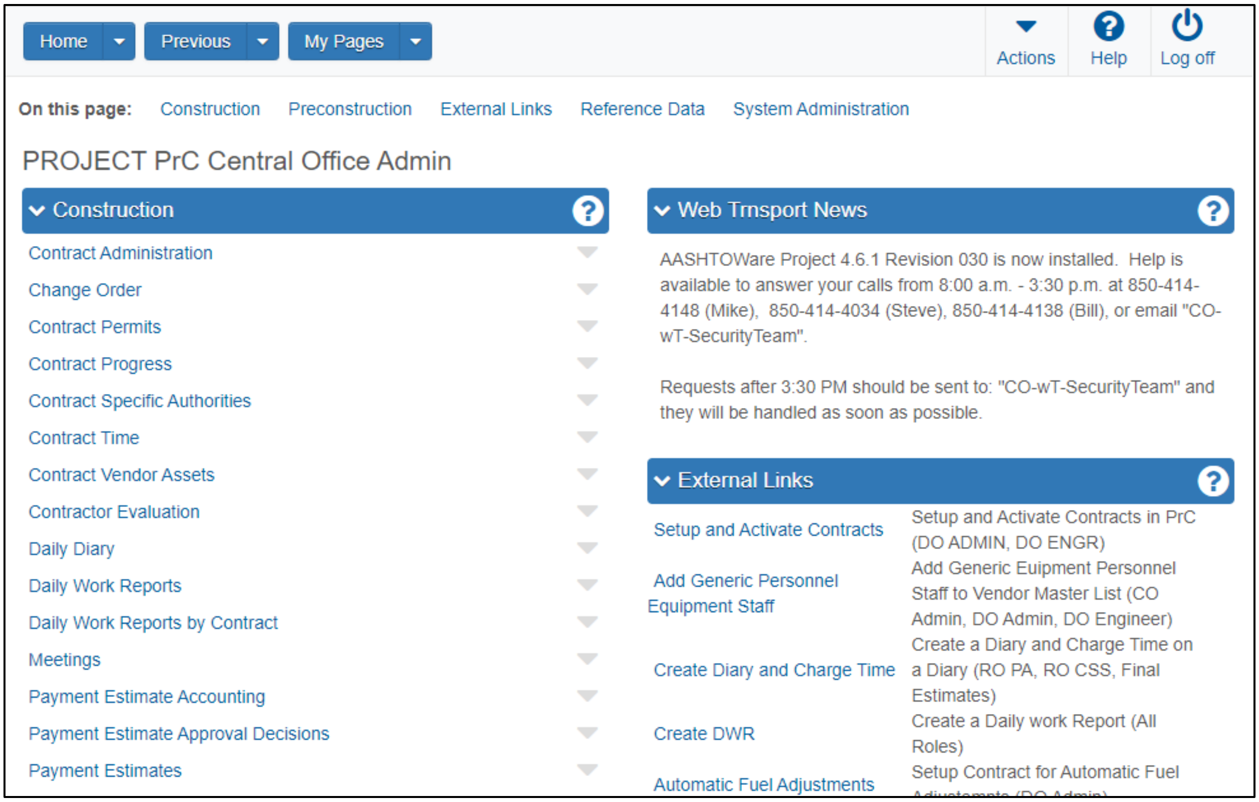


Figure 2. Dashboard

Understanding Your Role

A user role is a name associated with a collection of security access rights to the information contained in system components. Roles combine the permissions needed for several related tasks and allow you more efficient access to the parts of the system you need. Roles are designed by FDOT and assigned to you by your system administrator.

Depending on your assigned roles, you may have one or more roles. You can switch your role at any time while working in the application.

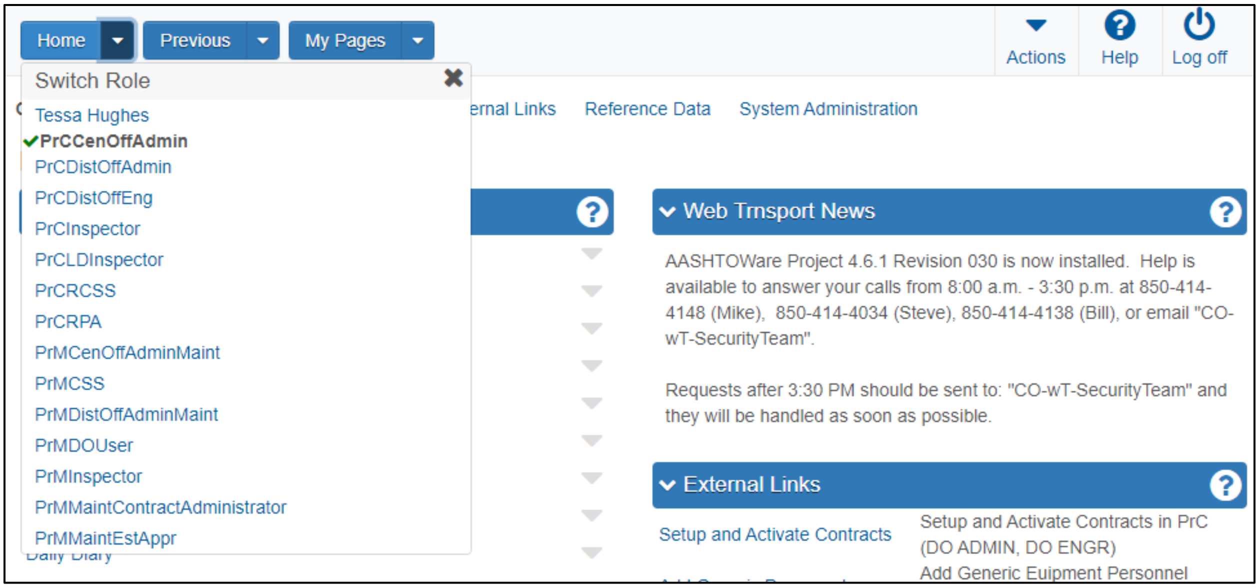


Figure 3. Viewing Active Role

Instructions 2

To view and change your active role:

1. From within AASHTOWare Project, on the **Home** button, click the drop-down arrow.
2. Select the appropriate role. **(PrCInspector)**

   The system will update the functionality you have access to based on the selected role.

3. Click the **Home** drop-down arrow and select another role. **(PrCDistOffAdmin)**

Viewing My Pages

The My Page Overview component contains a list of all the pages you have added to your My Pages list for your active role. This component functions similarly to a list of favorites in a browser.

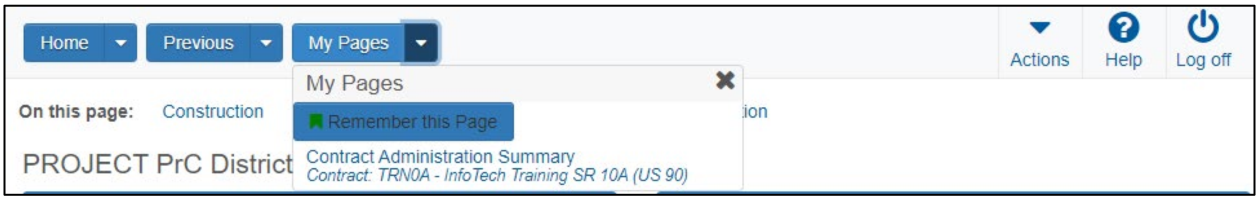


Figure 4.My Pages Overview

Instructions 3

To view and maintain My Pages:

1. In the **Construction** component, click the **Contract Administration** link.
2. On the **My Pages** button, click the drop-down arrow.
3. Click the **Remember this Page** button.
4. Click the **Close** button in the **My Pages** pop-up window.
5. Click the **My Pages** button.
6. Click the **Home** button.

Viewing Previous Activity

The Previous functionality allows you to return to pages and components that you previously visited in the system for your active role.

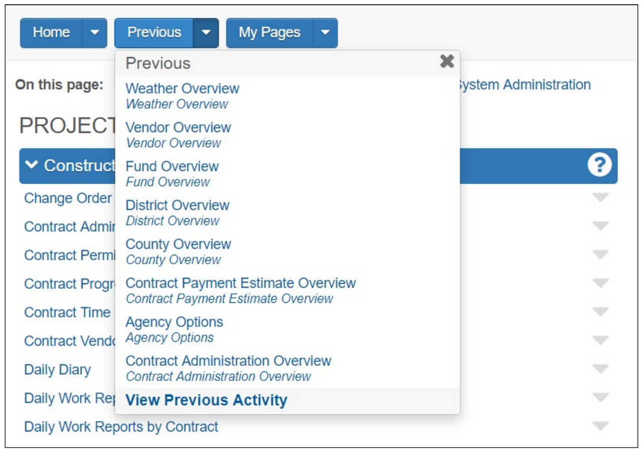


Figure 5. Viewing Previous Activity

Instructions 4

To view and maintain previous activity:

1. You can click the **Previous** button to return to the last page you visited in the system in your active role.

2. On the **Previous** button, click the drop-down arrow.

3. From the list of previous windows, select the entry for the appropriate window to which to navigate. **(Select any link)**

4. Click the **Home** button.

Using Online Help

The AASHTOWare Project Help system provides a wealth of information immediately available to you while you work. Understanding how the Help system works makes it easier to find the information you need.

When you access the context sensitive Help, the system displays information for the current component, with no further searching needed.

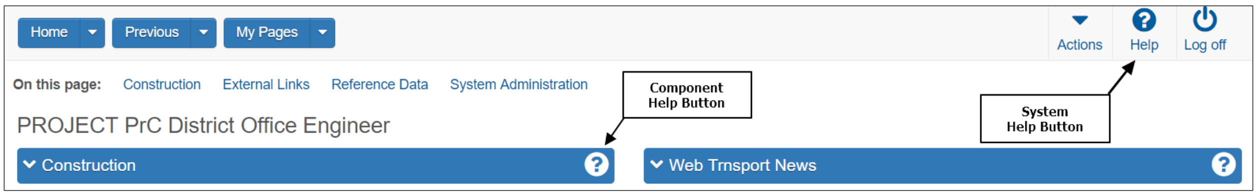


Figure 6. System Help Button and Component Help Button

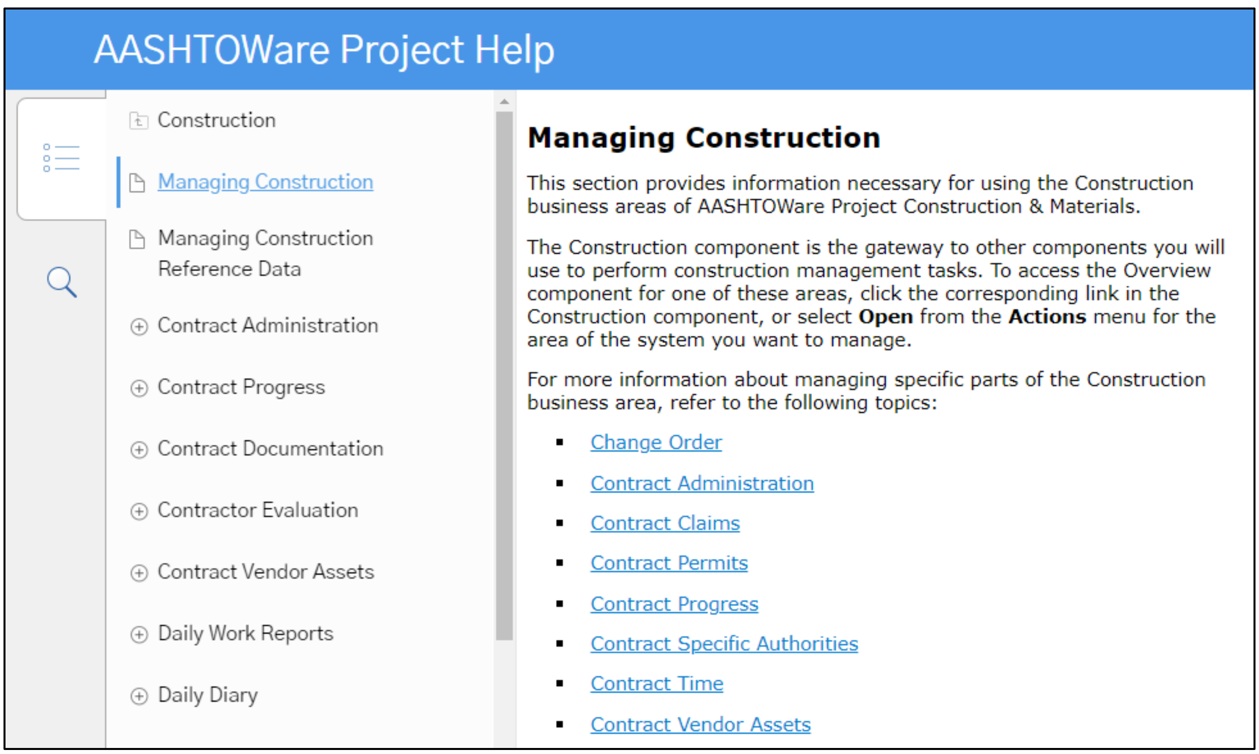


Figure 7. AASHTOWare Project Construction & Materials Online Help

Using Search

The Search pane provides a rapid full-text search of all the topics in the Help system.

Note: If your search phrase includes words that can be mistaken for the operators *Or*, *And*, or *Not*, place your search terms in quotation marks. For example, if you want to search for information on the tab "*Bids Not On Proposal*", place the tab name in quotation marks. Otherwise the search will not return the desired results.

Instructions 5

To view the online help:

1. On the **Menu** bar, click the system **Help** button.
2. Click on the blue bar at the top of the help window.
3. In the **Search** field, type a search term. **(daily work report)**
4. Hit the **Enter** key.
5. Click the appropriate title, which is a link to information about that topic. **(Adding a Daily Work Report)**
6. View the information.
7. Select a related topic located at the bottom of the page. **(Copying a Daily Work Report)**
8. View the information.

Instructions 6

To view all the available AASHTOWare reports for a module:

1. Click the **Table of Contents** tab located in the left-hand corner of the help window.
2. In the **Table of Contents** panel, click the **Up One Folder** icon at the top until you reach the highest level.
3. In the navigation panel, click the **Reports** link.
4. Click the module name. **(Report Descriptions - Construction)**
5. View the information.
6. Close the **Help** window.

Instructions 7

To access the context sensitive help for any component:

1. In the **Construction** component, click the **Contract Administration** link.
2. Click the component **Help** button.
3. View the information on the help window.
4. Close the **Help** window.

Using Components

The web-based AASHTOWare Project system displays information in application components. A component is a container for the information and business functions on an application webpage. Components are made up of elements such as fields, lists, and links. Some components contain a list of tabs along the left side, each of which corresponds to a subset of information related to the component entity.

> **Note**: To protect the information contained in FDOT's system, components and webpages only display the information and action features for which your active role has been assigned access.

Component features include:

- Component header with Save, Actions, and Help button
- Vertical Scroll Bar
- Fields
- Lists
- Filters
- Actions menus
- Modal windows
- Tabs

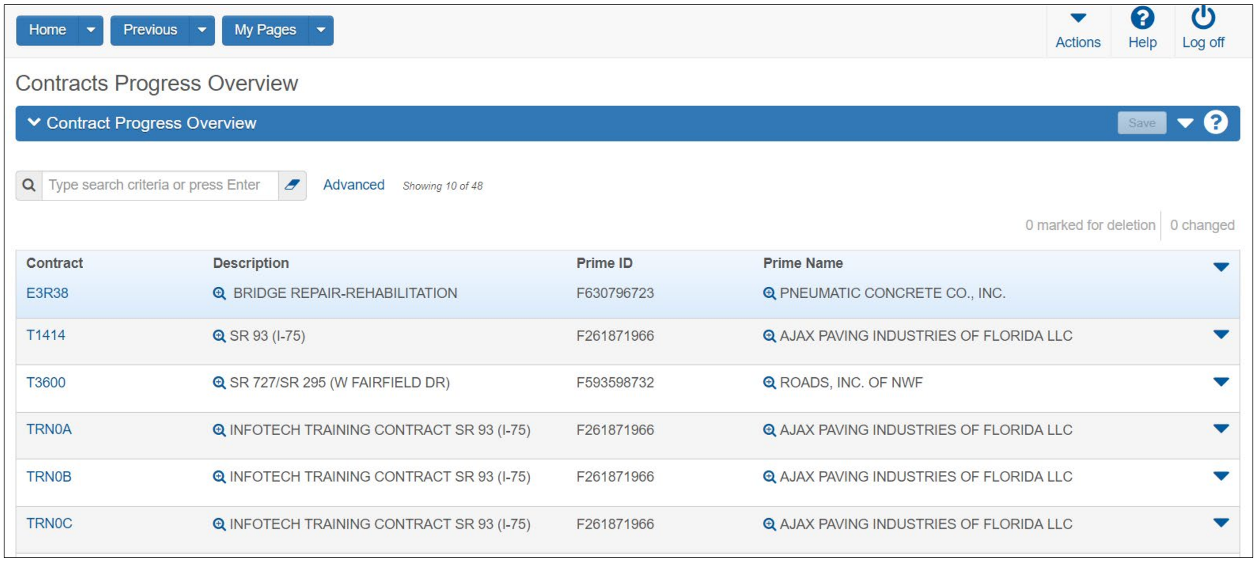


Figure 8. Overview Component Example

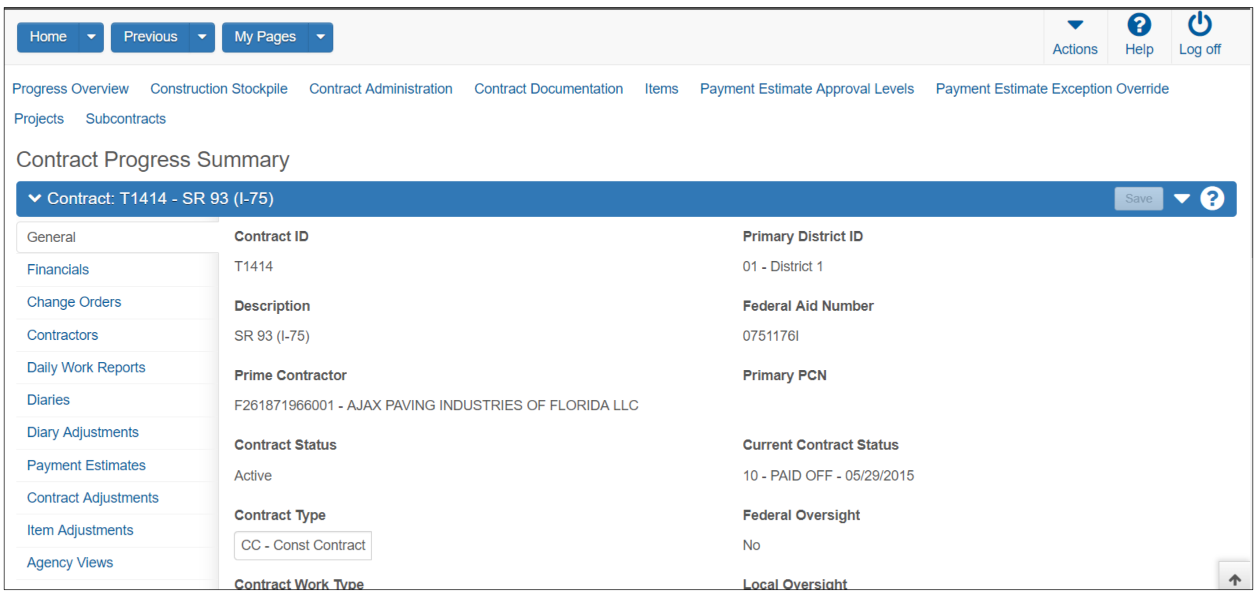


Figure 9. Summary Component Example

Working with Fields

Fields are the most common element found on components. Information can be recorded in fields. You can move from one field to another by pressing the Tab key or moving your pointer to the field and clicking the left mouse button. The system has several different types of fields, including those described below.

Text Boxes	Directly type or delete information.
Numeric Fields	Numeric fields allow only numeric characters.
Auto-complete Fields	Auto-complete fields are similar to text boxes except that they automatically display a filtered list of field values based on the first few characters typed into the field.
Date Fields	Date fields include a calendar button next to the field. Click the button to display a calendar and select a date to populate the field.
Drop-down List Boxes	Drop-down list boxes include a down arrow next to the field. Click the drop-down arrow to display a list of possible field values.
Non-editable Fields	Non-editable fields display information without a text box. The information cannot be changed.
Check Boxes	Check boxes are square boxes that can be selected or cleared by positioning the mouse pointer over them and clicking the left mouse button. Check boxes are used to turn an option on or off.
Agency Fields	Agency fields look and behave like any other field, but have been customized for purposes specific to an agency.

Working with Lists

Many system components contain lists of rows for a type of data, such as projects or proposals. You can browse list information using the scroll bar on the right side of the component. The system has several different types of lists, as described below.

Simple Lists These are read-only lists of information. If the rows in a simple list contain enough information, they may be collapsed or expanded.

Rolling Lists These typically contain only a few fields, and no more than two lines of information per row. Rolling lists are used for quick entry, maintenance, or view.

Accordion Lists Used to manage rows that require input into more fields than allowed in a rolling list. A row in an accordion list can be expanded or collapsed by clicking the expand/collapse button.

Grouped Lists Some components allow data in lists to be grouped relative to a field from that list.

Grouped Associations Grouped associations are similar to grouped lists, except that the data is grouped according to an association between multiple entities, not a field contained in the list.

Selection Lists To select a single data row, click anywhere inside the row. The system adds a check mark beside each row you select and shades the row. To cancel a selection, click the selected row again.

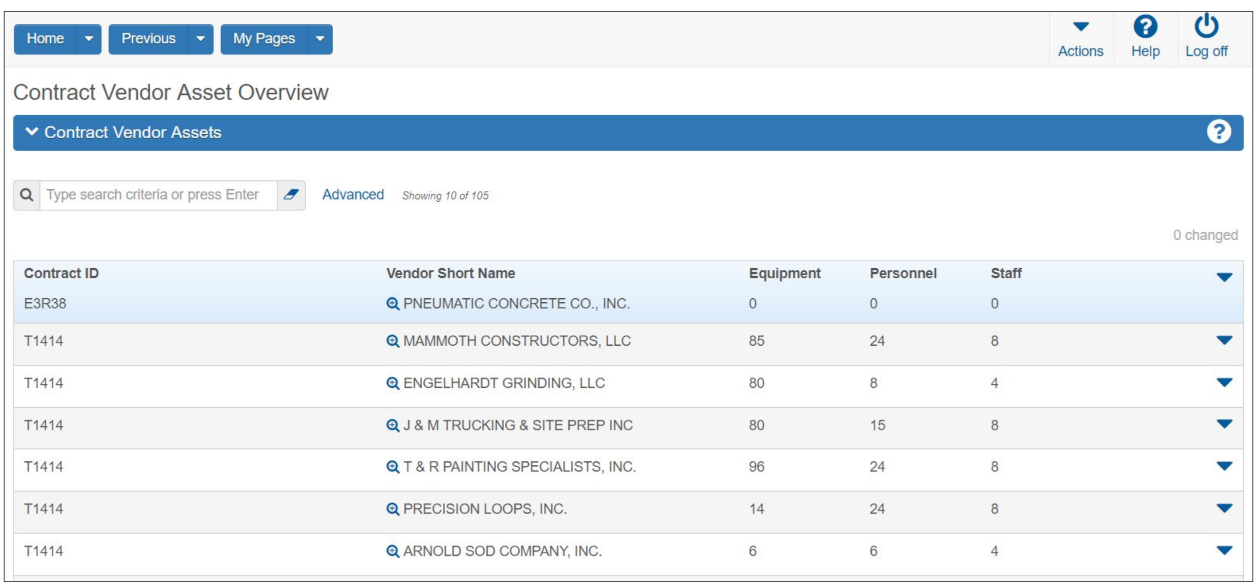


Figure 10. Simple List Example

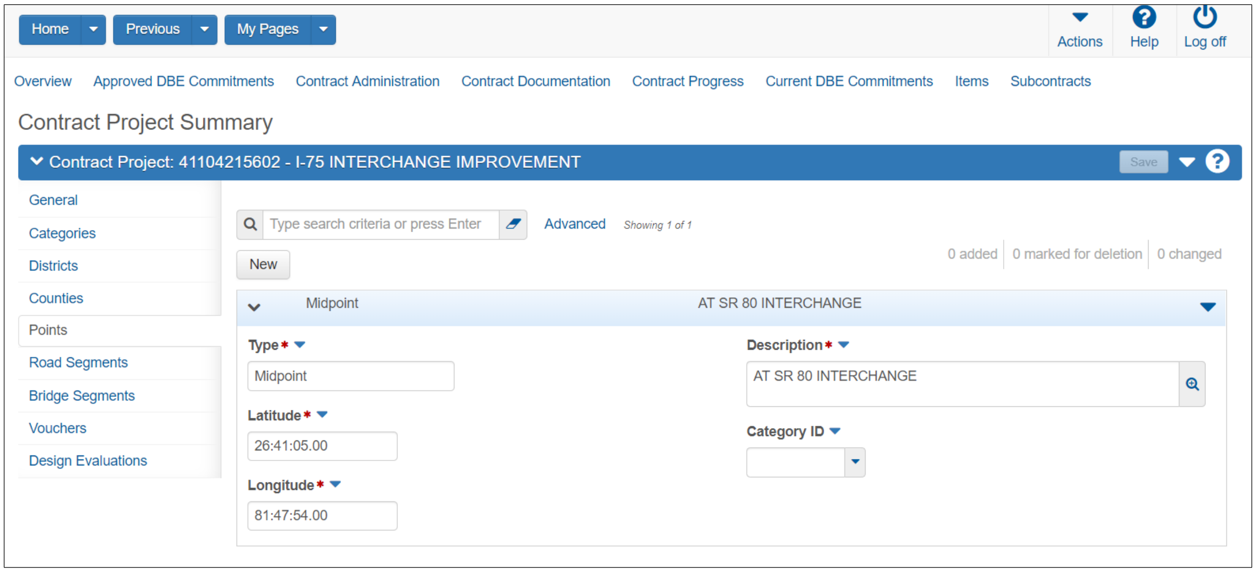


Figure 11. Accordion List Example - Expanded

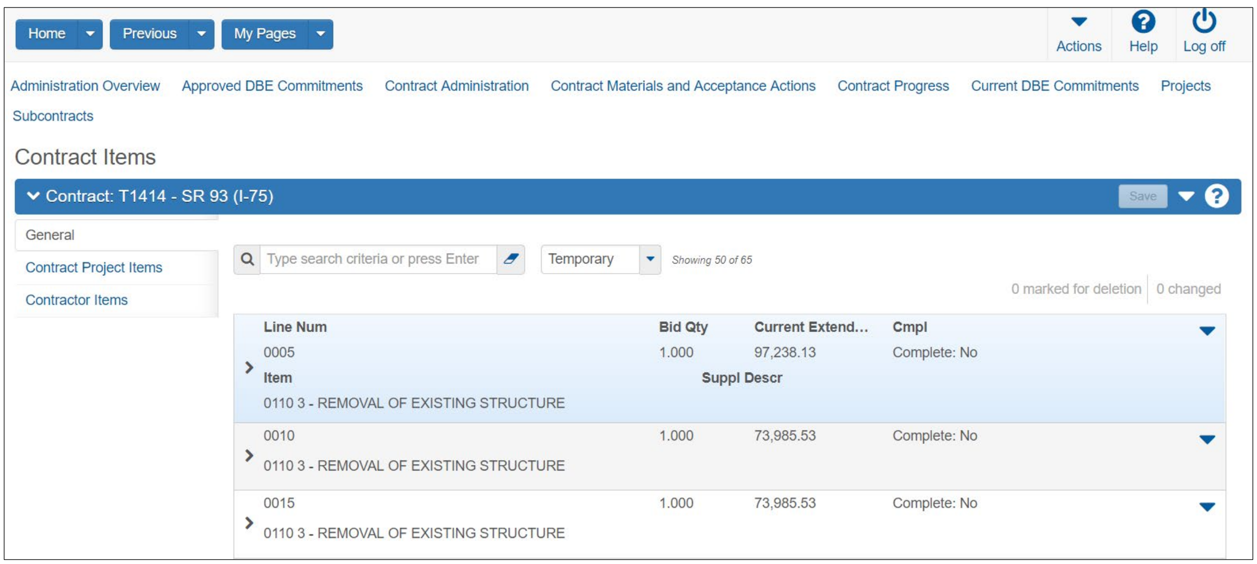


Figure 12. Accordion List Example - Collapsed

Using the Quick Find Search Box

System components with lists allow you to sort and filter the list to make it easier to find specific rows. You can create advanced sorts and filters that search on multiple criteria.

A Quick Find search box is standard on each component that contains a list. It searches all rows in the list for a string of text and then displays only rows with fields containing that string.

Note: The Quick Find search is not case sensitive.

Note: The word Temporary appears next to the Quick Find search field when a sort or filter is applied to the results list.

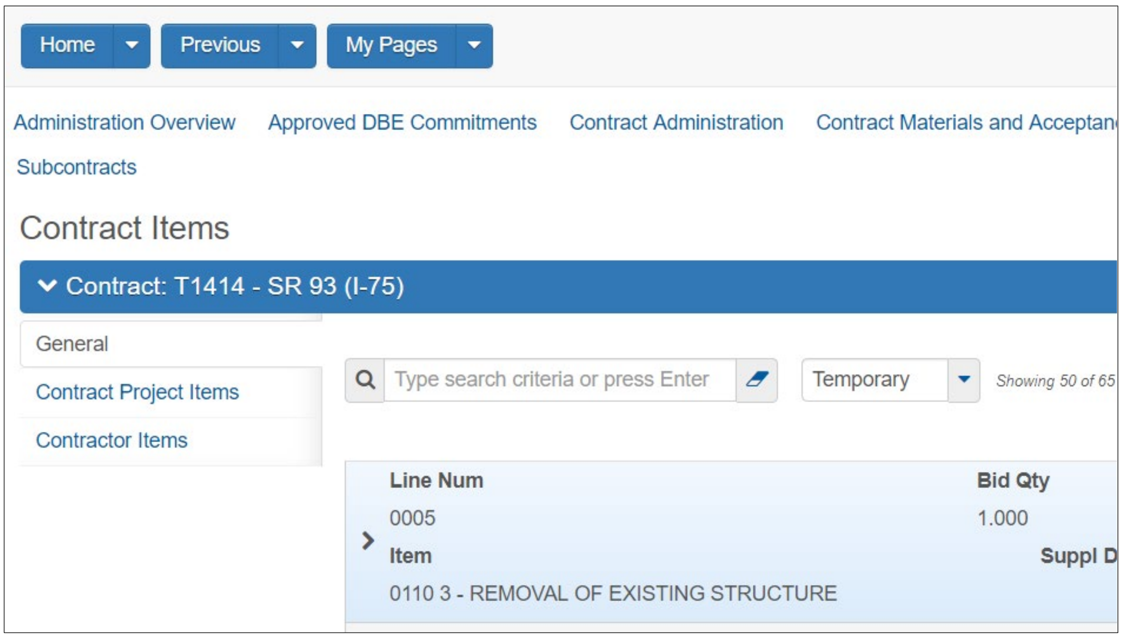


Figure 13. Quick Find Search Box

Instructions 8

To use the Quick Find search box:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCDistOffAdmin)**

2. Navigate to the appropriate overview window. **(Contract Administration Overview)**

3. In the **Quick Find** search box, type the appropriate search term. **(TRNXX,** where XX is your assigned contract number)

4. To clear your search term, click the **Eraser** button.

Using Advanced Filters and Sorts

Every system component that contains a Quick Find search box provides an **Advanced** filter link that allows you to create and save custom sorts and filters that search on multiple criteria. Sorts and filters can be based on both visible and hidden fields for an entity.

Some field types may not be used as sort and filter criteria, including system generated IDs, code table descriptions in fields associated with a code table, counts that are not stored in the database, passwords, and fields that are a list of other fields.

> **Note:** A System Administrator role may save an agency-wide filter and apply the agency-wide filters to multiple roles.

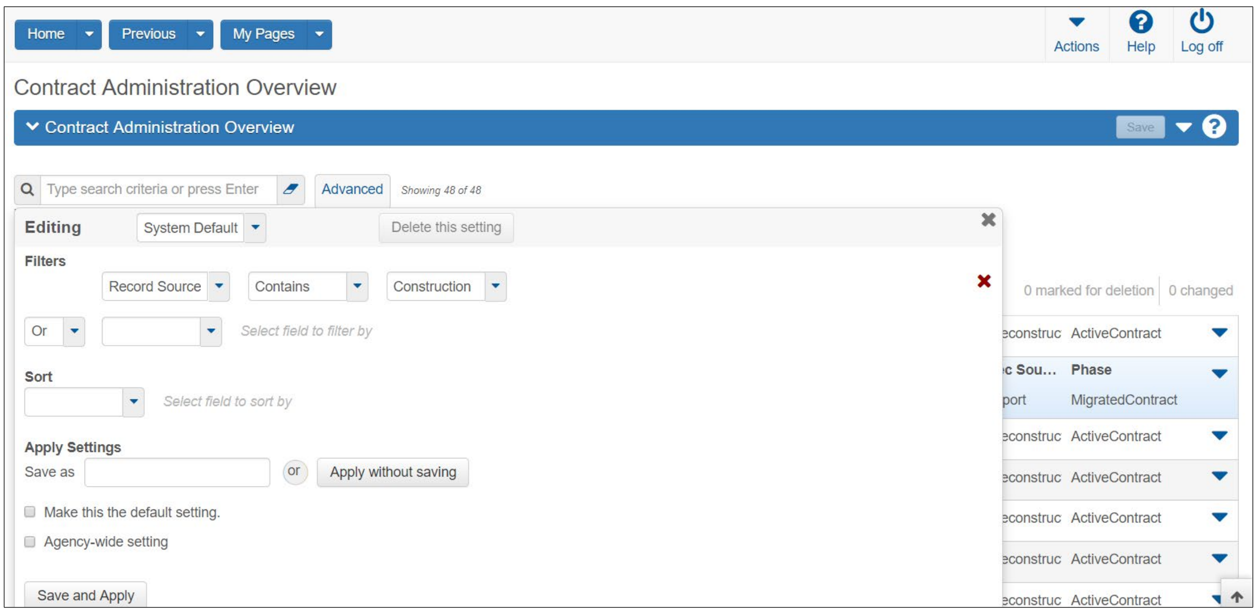


Figure 14. Advanced Filter/Sort Window

Instructions 9

To use an FDOT filter on the Contract Administration Overview:

1. Next to the **Quick Find** search box, view the filters available.
2. Click the filter drop-down arrows and view the filter options.
3. Select the filter option of your choice.
4. Click the filter drop-down arrow and select **No Filter**.

Instructions 10

To create and save a filter using the Advanced Filter/Sort window:

1. Next to the **Quick Find** search box, click the **Advanced** link.
2. In the **Filters** field, click the drop-down arrow to display a list of all the columns in the component (including hidden columns).
3. Select the column by which to filter. **(Contract ID)**
4. Click the drop-down arrow and select the operator you want to use to narrow your filter. **(Contains)**
5. Enter the value you are trying to match or want to use as a delimiter (if a text box, the filter is not case-sensitive). **(TRNXX,** where XX is your assigned contract number)
6. In the **Sort** field, click the drop-down arrow to display a list of all the columns in the component (including hidden columns). Select the column by which to sort. **(Skip)**

   Training Note: Some instructions apply on-the-job, but aren't applicable in training. When this happens, you will (SKIP) the instructions.
7. The component information will sort in ascending order. To sort the selected column in descending order, click in the **Sort descending** check box. **(Skip)**
8. In the **Apply Setting** section, in the **Save as** box, enter the name for which to save your search criteria for future use. **(TRNXX,** where XX is your assigned contract number)
9. Click the **Save and Apply** button.

   To perform a search without saving the search criteria, simply click the Apply without saving button and do not enter a Save as name.

Modifying and Deleting Saved Settings

You can modify and delete the filter and sort settings that you save.

Instructions 11

To modify a saved filter or sort setting:

1. Next to the **Quick Find** search box, click the drop-down arrow.
2. Scroll to and click the **Advanced** link.

3. In the **Editing** section, click the drop-down arrow and select the saved filter or sort to modify. **(TRNXX,** where XX is your assigned contract number
4. Change information in columns, operators, and values as needed. **(Does Not Contain)**
5. Click the **Save and Apply** button.

Instructions 12

To delete a saved filter or sort setting:

1. In the Advanced filter **Editing** section, click the drop-down arrow and select the filter or sort to delete. **(TRNXX,** where XX is your assigned contract number**)**
2. Click the **Delete this setting** button.
3. Click the **Close** button.

Using Actions Menus

Actions menus allow you to choose a function or process to perform on data. Actions menus are located throughout the application and are accessed by clicking an Actions button. The system has several different types of action menus, as described below.

System Actions Menu

The Actions menu for system-level functions and processes is located on the Menu bar, a horizontal strip at the top of every system webpage. Clicking the Actions button opens the Actions menu.

Component Actions Menus

Component Actions menus contain functions and processes that can be performed on the component level, for example, adding or importing a new project.

List Actions Menus

List Actions menus contain functions and processes that can be performed on a list, for example, adding items to a project item list. The button for this type of Actions menu is located below the component header, directly above the list.

Row Actions Menus

Row Actions menus contain functions and processes that are performed on an individual data row in a list, for example, adding or deleting an item. The Actions button is located on the right side of each row.

Row Actions menus on a worksheet list are different from those on other types of lists. For more information about row Actions menus on a worksheet, see the *Working with Worksheets* section in the *AASHTOWare Project Construction & Materials™ User's Guide for Construction*.

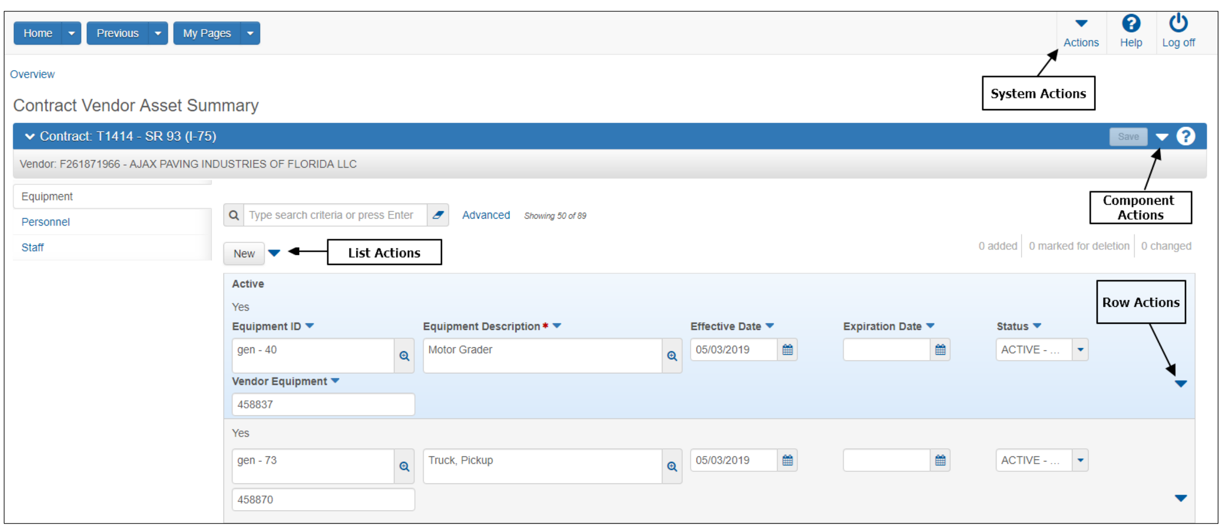


Figure 15. Actions Buttons

Reviewing Action Menus

Instructions 13

To review component and row actions:

1. From the Contract Administration Overview, in the **Quick Find** search box, type the appropriate search term. **(TRNXX,** where XX is your assigned contract number**)**

2. For any row in the list, click the row **Actions** button to view the available actions, tasks, or views for the row.

3. In the row **Actions** menu, click the **Close** button.

4. Click the **Contract** link. **(TRNXX,** where XX is your assigned contract number)

5. Click the component **Actions** button to view the available actions, tasks, or views for the component.

6. In the component **Actions** menu, click the **Close** button.

Global Actions

The Global Actions section describes how to use features that are available in all business areas of the web-based AASHTOWare Project system. You can access these features from any webpage in the system by clicking the Actions menu on the Menu bar.

Working with Attachments

Attachments provide an easy way to integrate outside information of various kinds into your project, contract or any other system entity. Examples of the types of files you might attach include Microsoft Word documents, Excel spreadsheets, PDFs, URLs, digital photographs and other types of graphic files.

Attachments are accessed on any component by clicking the Actions button on a row or component header.

The Attachments Overview component contains a list of rows for all the files that have been attached to the entity by you or another user with your active role.

Note: You may use attach files such as pictures, PDFs, spreadsheets, and documents as needed. However, the AASHTOWare Project Construction & Materials attachments functionality doesn't replace the use of other FDOT document management systems, which include:
- EDMS (Electronic Document System for FDOT)
- CDMS (Construction Document System)
- PSSP (Project Solve Share Point for Construction)
- MDMS (Maintenance Document System)

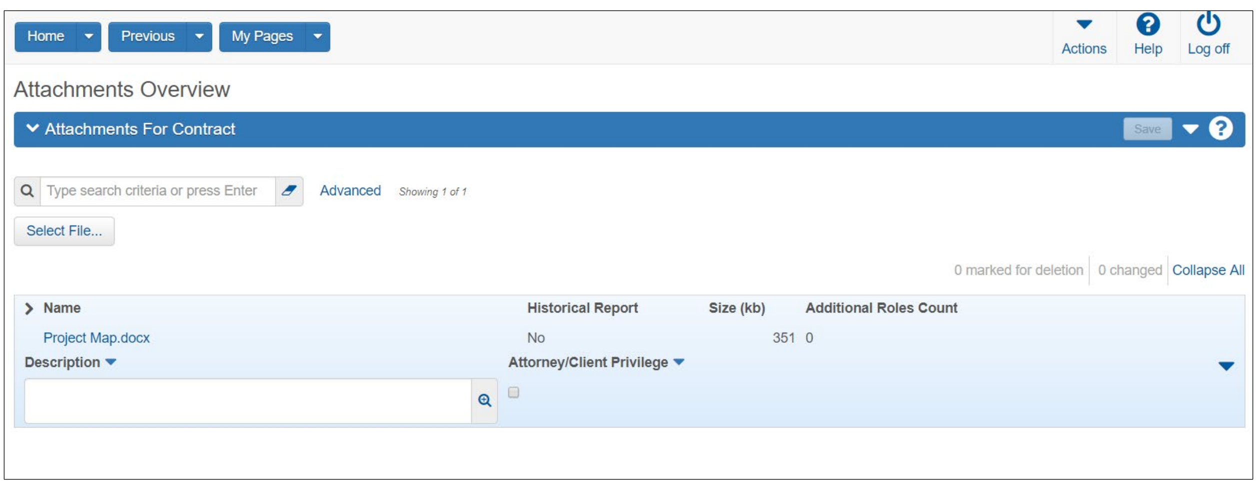


Figure 16. Attachments Overview

Attaching a File to a Record

Instructions 14

To add an attachment:

1. From the Contract Administration Summary, click the component **Actions** button and select the **Attachments** view.

2. Click the **Select File** button.

3. In the **Choose File to Upload** window, navigate to the directory where the file is located and click the file to attach. **(Select the file indicated by your instructor)**

4. Click the **Open** button.

5. In the **Description** field, type a description for the attachment. **(Training attachment for TRNXX,** where XX is your assigned contract number**)**

6. Click the **Save** button.

Granting Security Access to an Attached File

You can allow users with other roles to have access to attachments.

Selecting Data in Modal Windows

A modal window is a secondary pop-up window associated with a component. While a modal window is open, you cannot work in the associated component, but you can reposition the modal window to view information behind it.

Modal windows are used when you add one or more rows of data to an entity, to select the records you want to add. Each modal window includes a Quick Find search box to help you find the data you want to add. To select data to add, click anywhere inside its row. The system adds a check mark beside each row you select and shades the row. When you have selected all the data you want to add in a selection modal window, click the Add button.

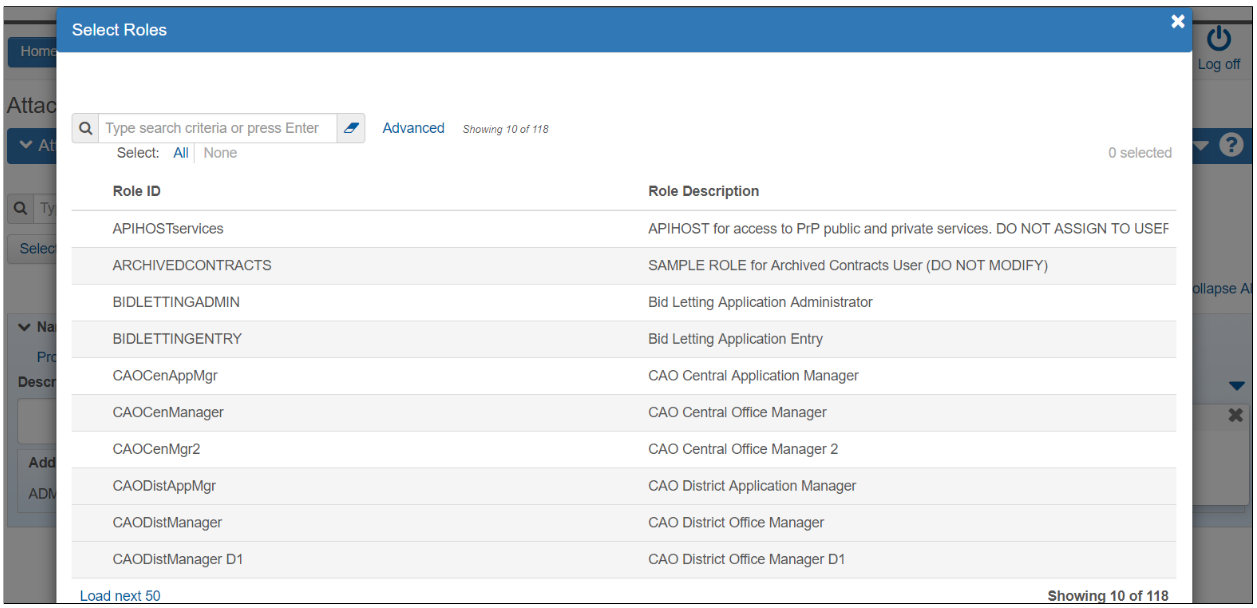


Figure 17. Attachment Security Access Example

Instructions 15

To grant users with other roles access to the attachment:

1. On the attachment’s row, click the row **Actions** button and click **Select Roles….**
2. In the **Quick Find** search box, search for and select the roles to add. **(Click “Show first 10” then Select: All)**
3. Click the **Add to Attachment** button.

4. Click the **Save** button.

Removing Security Access to an Attached File

Instructions 16

To remove access to the attachment for users with a specific role:

1. Click the expand arrow for the attachment from which to remove a role.
2. Select the role to remove. **(DBEUSER)**
3. Click the row **Actions** button and select **Delete.**
4. Click the **Save** button.

Using Global Attachments

The Global Attachments Overview component allows you to view and change two types of global attachments:

- Attachments are attached files that you have permission to view, but are attached to entities you do not have permission to access.
- System Attachments are files not attached to a specific entity.

You can access the Global Attachments Overview from any page in the application. For the system attachments that you create, you can also grant and remove security access to roles, as shown in the sections above.

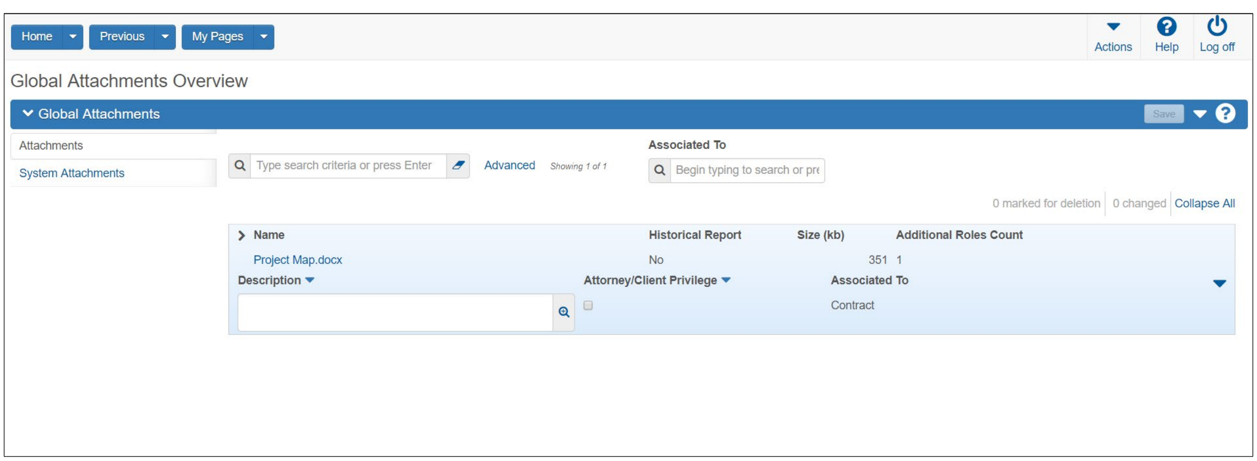


Figure 18. Global Attachments Overview

Instructions 17

To view global attachments:

1. On the **Menu** bar, click the system **Actions** button.

2. Click the **Global Attachments** action.

   The Attachments tab lists any attached files that you have permission to view, but that are attached to entities you do not have permission to access.

3. Click the attachments name link to open the attachment in the attached file's application. **(Skip**)

4. Close the attached file's application when you have finished reviewing the attachment. **(Skip**)

5. Click the **Previous** drop-down arrow and select the **Contract Administration Summary** link. **(TRNXX,** where XX is your assigned contract number)

Working with Links

You can attach a link to an outside website address (also known as a *URL*) to your project, contract, or any other entity in the system. Any user with an active role who has permission to access the entity will be able to access the attached link. You can also give users whose role does not allow them access to the entity permission to access the attached link.

You can access links on any component by clicking the Actions menu on a row or component header, and then clicking the link you want to follow.

Use caution when granting role access rights that allow users to create links (Assign Role Access Rights component, Resources tab, URL Attachments) and assign access to those links (Assign Role Access Rights component, Resources tab, URLAttachmentRoles). Users granted access to creating links could potentially create a link to malware or a malicious resource. If that occurred, any user with authority to access the link could click it, which may lead to undesired consequences.

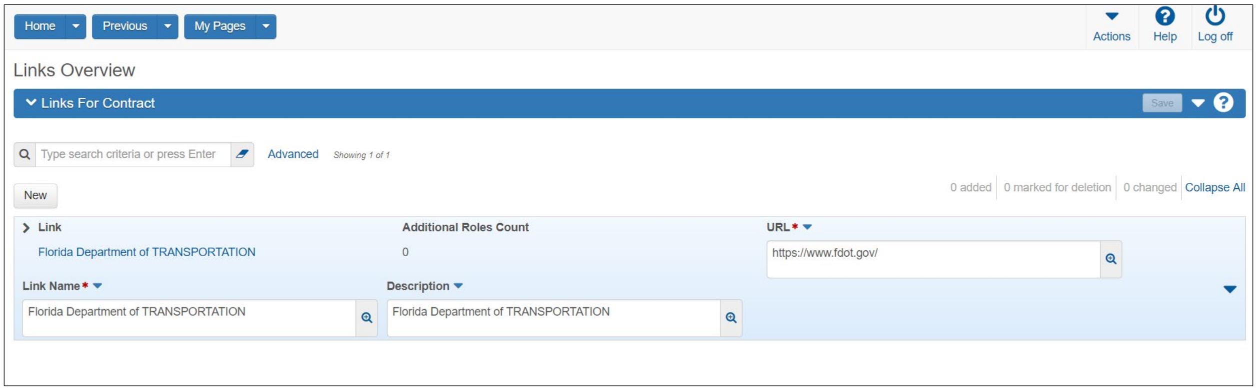


Figure 19. Links Overview

Attaching a Link to a Record

Instructions 18

To attach a link:

1. From the Contract Administration Summary, click the component **Actions** button and select the **Links** view.
2. In the **URL** field, type the URL for the link. **(www.fdot.gov)**
3. In the **Link Name** field, type a name for the link. **(FDOT)**
4. In the **Description** field, type a description for the attachment. **(Training link for TRNXX,** where XX is your assigned contract number**)**
5. Click the **Save** button.

Granting Security Access to a Link

You can attach a link to an outside web address (also known as a URL) to an entity in the system. Any user with the same active role as the person who attached the link, who has permission to access the entity will be able to access the attached link. You can also give users whose role does not allow them access to the entity permission to access the attached link.

Instructions 19

To allow users with other roles to access a link:

1. On the link's row, click the row **Actions** button and click **Select Roles…**
2. In the **Quick Find** search box, search for and select the roles to add. **(Click "Show first 10" then Select: All)**
3. Click the **Add to URL** button.
4. Click the **Save** button.

Removing Security Access to a Link

You can remove role security access only from links that you created.

Instructions 20

To remove security access from a link for a role:

1. For the link, click the expand arrow if needed.

   The system displays a list of the roles that are assigned access to the link.

2. For each role you want to remove, click the row **Actions** button and select **Delete**. **(DBEUSER)**
3. Click the **Save** button.

Using Global Links

Links provide a convenient way to access an outside website while working in the system. The Global Links Overview component allows you to view and change two types of global links:

- Links are links that you have permission to access, regardless of whether you have permission to access the entities associated with the links.
- System Links are links that are not attached to a specific entity.

You can access the Global Links Overview from any page in the application. You can also grant and remove security access to roles, as shown in the sections above.

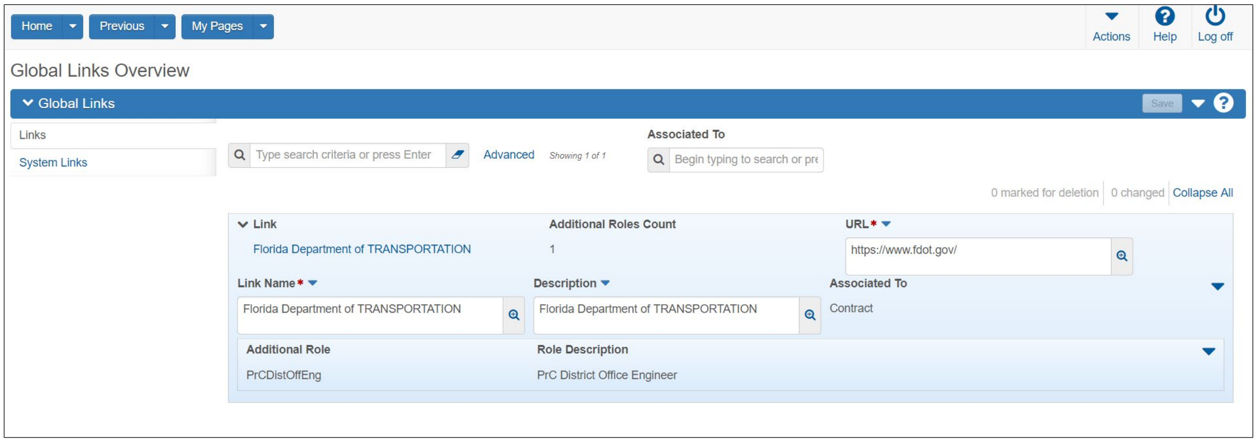


Figure 20. Global Links Overview

Instructions 21

To view system links:

1. On the **Menu** bar, click the global **Actions** button.
2. Click the **Global Links** action.

   The Links tab lists the links that you have permission to access, but that are linked to entities you do not have permission to access.

3. Click the **Link** name to open the web page. **(Skip)**
4. Close the web browser when you have finished reviewing the link. **(Skip)**
5. Click the **System Links** tab.

   The System Links tab lists any links that you have permission to view that are not attached to a specific entity.

6. Click the **Link** name to open the web page. **(Skip)**
7. When you have finished reviewing the link, click the **Home** button.

Managing My Settings

The My Settings component contains information about your user account and your email address. For new users, agencies may choose to set the New User Help option to open to the Role-Based Workflows help topic when you click the Help button on the Menu Bar. Contact your system administrator to request an update to your information.

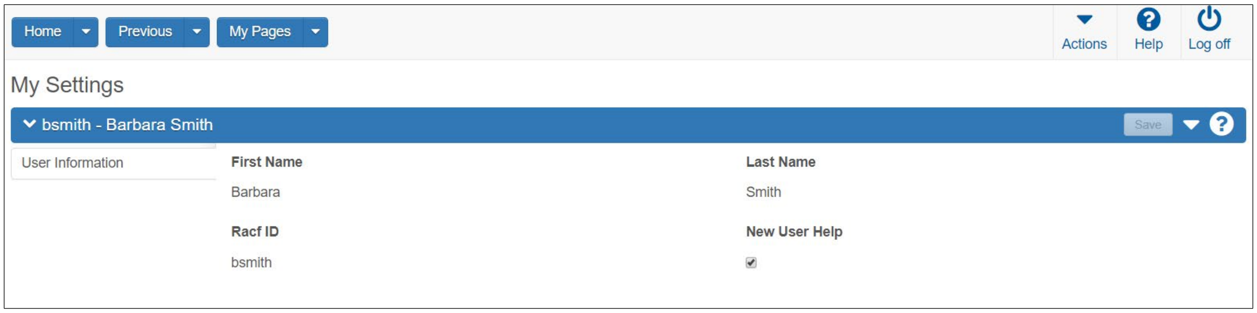


Figure 21. My Settings Component

Instructions 22

To view information about your settings:

1. On the **Menu** bar, click the system **Actions** button.
2. Click the **My Settings** action.
3. Review your user information.

Logging Off

You can log off the system at any time by clicking the Log off button on the Menu bar on any page in the application. When you log off, the system ends your session and takes you to the logon page.

Instructions 23

To log off AASHTOWare Project:

1. On the **Menu** bar, click the **Log off** button.

Contract Administration

Managing Contracts

A contract is the written agreement between FDOT and the successful bidder that sets forth the obligations of both parties, including performance of work, furnishing of labor and materials, and basis of payment. The Contract Administration Overview provides access to manage all of the information recorded in a contract.

After a proposal has been let and awarded to the winning bidder, it then becomes a contract in the agency workflow. This transition process moves the proposal from the AASHTOWare Project Preconstruction workflow into the AASHTOWare Project Construction & Materials workflow. A transitioned contract contains all the proposal information needed to manage construction and pay for road and bridge construction and maintenance work, and it can be modified as work progresses.

The status of a contract can move from *Pending* to *Active* to *Closed* to *Archived*.

Please note that depending on the roles you are assigned, you may not have access to all the functionality shown in this training guide.

At FDOT, proposals will be transitioned from AASHTOWare Project Preconstruction to become contracts in AASHTOWare Project Construction & Materials. The transitioned contract will be reviewed, with additional information recorded as needed, and then the transitioned contract will be activated.

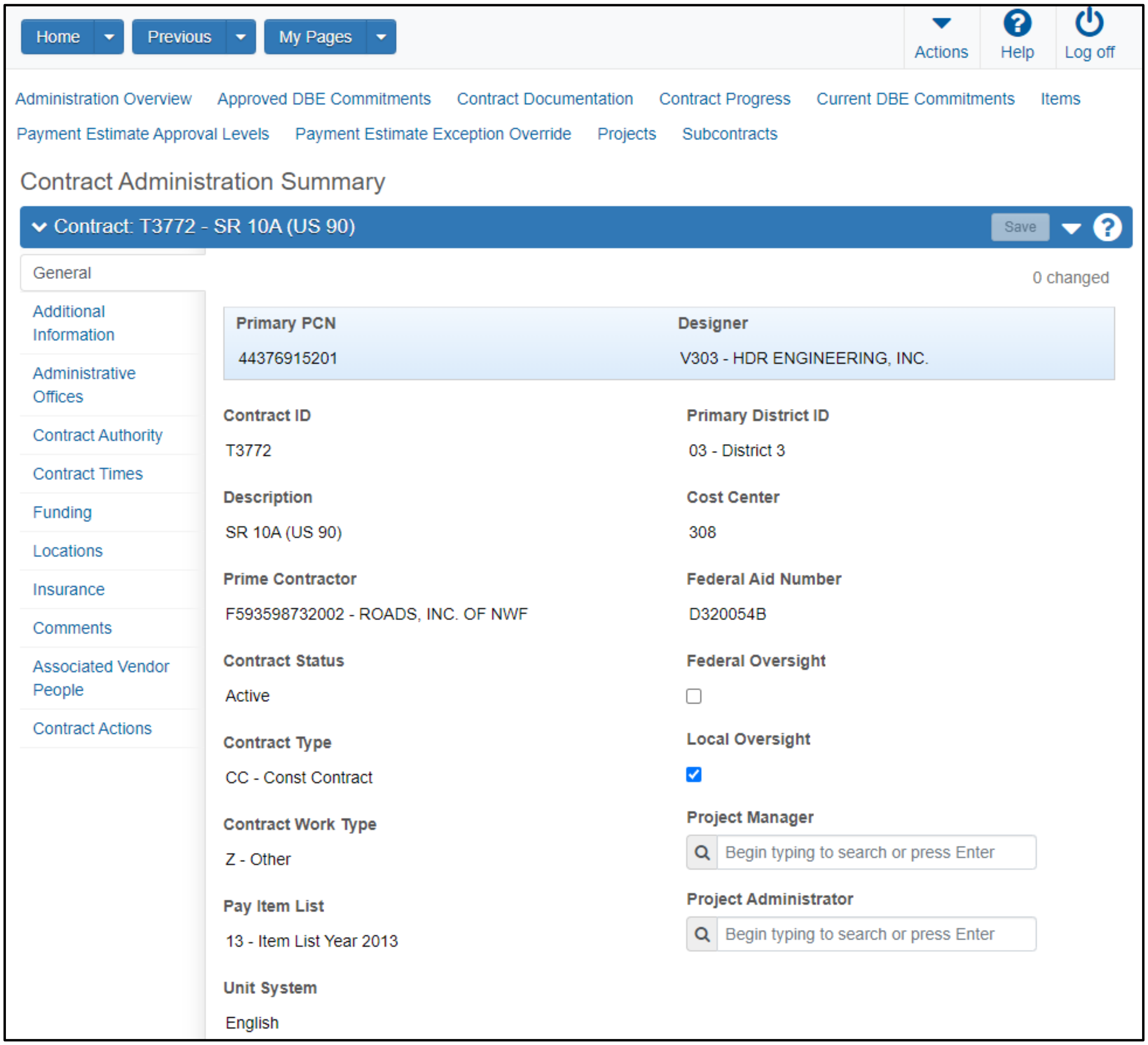


Figure 22. Contract Administration Summary

Maintaining Contract General Information

Required fields are:

- Contract ID
- Description
- Prime Contractor ID
- Spec Book

Note: All contracts will begin in Pending status. Appropriate FDOT personnel will change your contract to Active status after the contract is reviewed and updated.

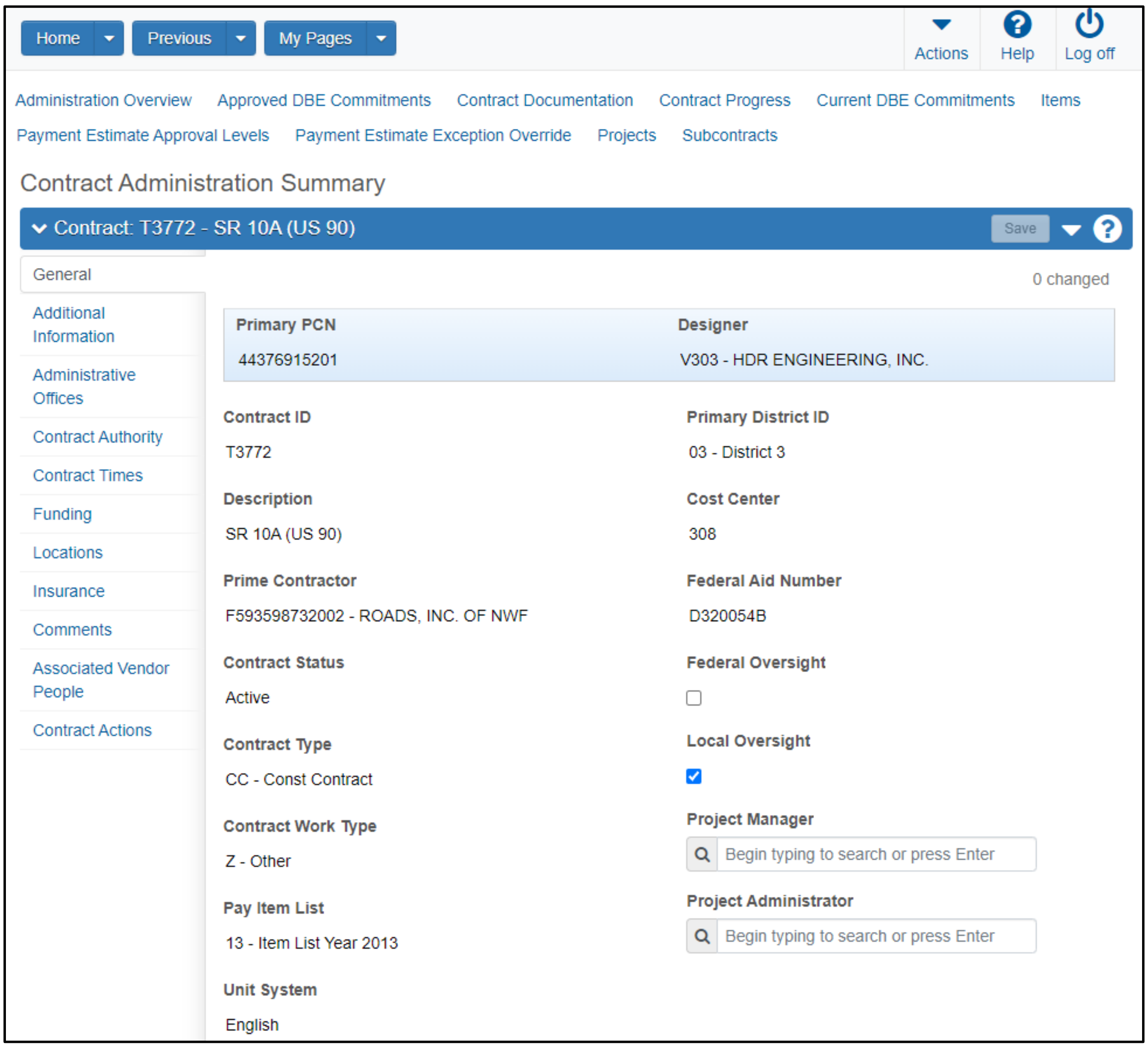


Figure 23. Contract Administration Summary – General Tab

Instructions 24

Navigation: Construction > Contract Administration

To maintain contract general information:

1. Click the **Home** drop-down arrow and verify the correct role is selected. (**PrCCenOffAdmin**)
2. In the **Construction** component, click the **Contract Administration** link.
3. Search for the appropriate contract. **(TRNXX,** where XX is your assigned contract number**)**
4. Click the **Contract** link.
5. In the **Contract ID** field, view the unique identifier for the contract.
6. In the **Description** field, view the contract description.
7. In the **Prime Contractor** field, view the reference vendor who was awarded the proposal or the principle contractor on the contract.
8. The **Contract Status** field will show the status as *Pending* prior to the contract being activated.
9. In the **Contract Type** field, view the contract type.
10. In the **Contract Work Type** field, view the kind of work to be performed.
11. In the **Pay Item List** field, view the appropriate spec book.
12. In the **Unit System** field, view whether the value is English or Metric.
13. In the **Highway/Route** field, view the primary route on which the contract will take place.
14. In the **Location** field, view the location where the contract work is taking place.
15. In the **Comments** field, view any additional information about the associated work.
16. In the **Long Description** field, view the detailed description of the contract.
17. In the **Primary District ID** field, view the primary district of the Contract ID.
18. In the **Federal Aid Number** field, view the federal aid number (or FA number) of federally funded contracts. For state funded contracts, this field will contain N/A.
19. In the **Primary PCN** field, view the primary project number.

20. Click the **Federal Oversight** check box if federal authorities must receive and approve any change orders for this contract**. (Unchecked**)
21. Click the **Local Oversight** check box if local authorities must be copied on and approve any change orders for this contract. **(Unchecked**)
22. In the **Project Manager** auto complete field, select the project manager name. **(Use your username**)

    In this field, you will enter the name of an individual who will administer the contract.

23. In the **Project Administrator** auto complete field, select the project administrator managing this contract. **(Use your username)**

    In this field, you will enter the name of an individual who will administer the contract.

24. Click the **Save** button.

Maintaining Additional Contract Information

The Additional Information tab allows you to record additional information on the contract.

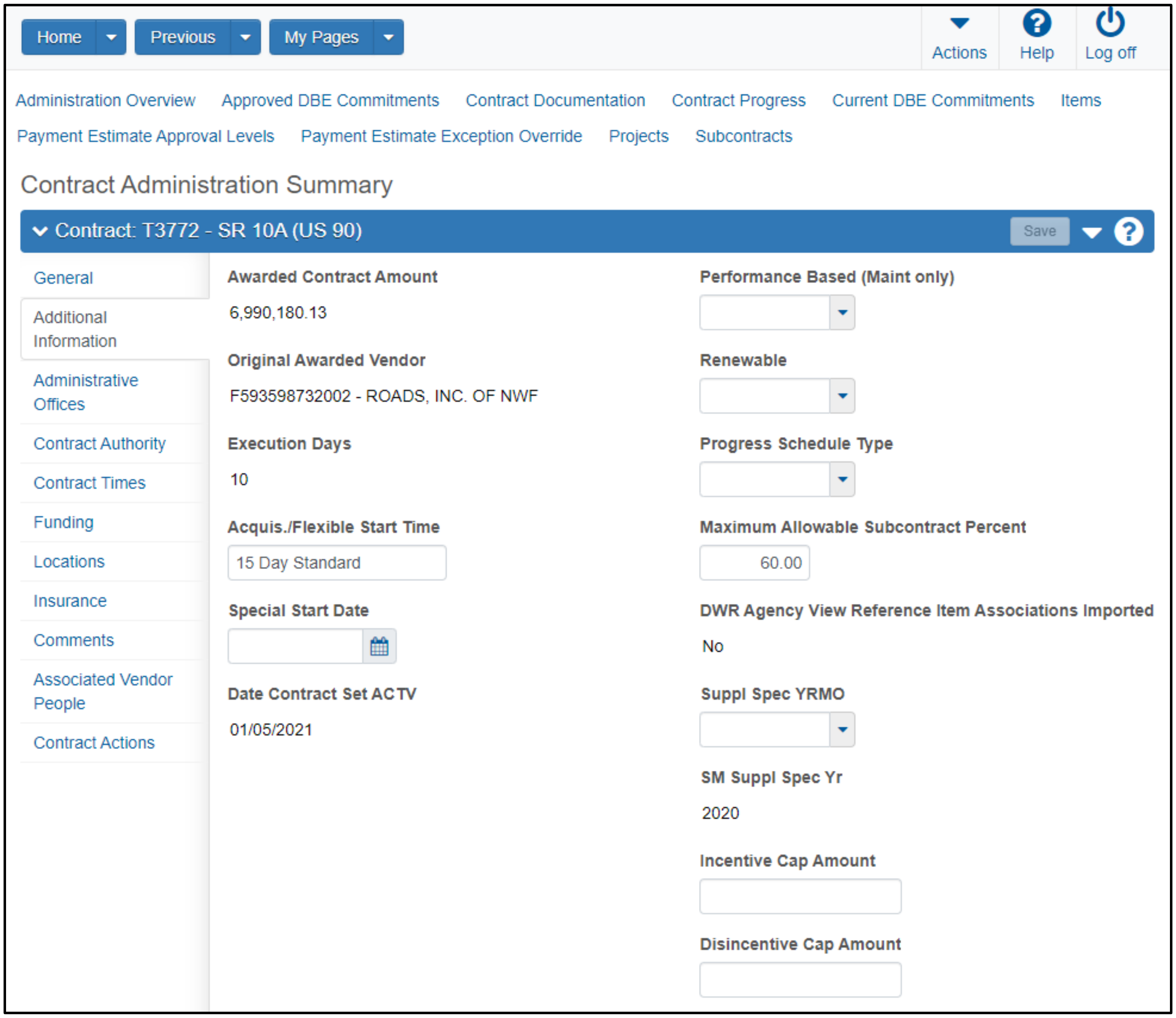


Figure 24. Contract Administration Summary – Additional Information Tab

Instructions 25

Navigation: Construction > Contract Administration Summary > Additional Information tab

To view additional information:

1. Click the **Additional Information** tab.
2. View the **Awarded Contract Amount.**
3. View the **Original Awarded Vendor** field.
4. In the **Execution Days** field, view the number of execution days.
5. In the **Acquis./Flexible Start Time** field, view the number of days.
6. In the **Special Start Date** field, view the special start date. **(When needed, enter a date**)
7. View the **Date Contract Set ACTV** field.

   The system populates this date when an FDOT staff member activates the contract.
8. View the **Performance Based (Maint only)** field .

   For maintenance contracts, this value will transition from AASHTOWare Project AASHTOWare Project Preconstruction.
9. View the **Renewable (Maint only)** field .

   For maintenance contracts, this value will transition from AASHTOWare Project Preconstruction.
10. In the **Progress Schedule Type**, click the drop-down arrow and select the method used to track contract progress: **Critical Path Method**, **Percent Complete for a Time Period**, or **Percent of Critical Items Complete**.**(When needed, select a value)**
11. In the **Maximum Allowable Subcontract Percent**, enter the maximum percent of contract work that the agency allows to be subcontracted for non-specialty items. **(60.00)**
12. The **DWR Agency View Reference Item Associations Imported** field indicates whether the contract imported associations between DWR agency views and reference items.
13. In the **Suppl Spec YRMO** dropdown field, view the supplemental specification book associated with the proposal in addition to the primary spec book. **(When needed, select a value**)

    This field is for the Spec Book used on the contract and not the Pay Item Spec year list.
14. View the **SM Suppl Spec Yr** field for the SM supplemental spec year.

    This field is only used when applicable for contracts migrated from SiteManager.

15. In the **Incentive Cap Amount** field, view the maximum incentive amount that can be paid to contractors for work on the contract. **(When needed, enter a value)**
16. In the **Disincentive Cap Amount** field, view the maximum total amount of disincentives that can be withheld from payment to contractors for work on the contract. **(When needed, enter a value)**
17. In the **CEI Consultant** field, search for and select the name of the project administrator managing this contract, if appropriate. **(When needed, select a name)**

    This field may not be visible for the PrCDistOffAdmin role.
18. Review the **CEI Consultant Office Location** field for the CEI office location.

    This field may not be visible for the PrCDistOffAdmin role.
19. Review the **Phase Name** field.
20. The **Record Source** field identifies whether the contract was created in the Construction component, transitioned from AASHTOWare Project Preconstruction, or imported from another source.
21. The **Migration Complete** check box identifies whether the contract migration is complete.

    This check box is only applicable to contracts migrated from SiteManager. This check box is not applicable to contracts that were activated in PrC and have never been migrated.
22. If needed, click the **Save** button.

Maintaining Administrative Offices on the Contract

The Administrative Offices tab enables you to associate one or more administrative offices with the contract. Offices added to the contract follow the order of the FDOT administrative office hierarchy in reference data.

Note: At FDOT, Administrative Offices are also known as Cost Centers.

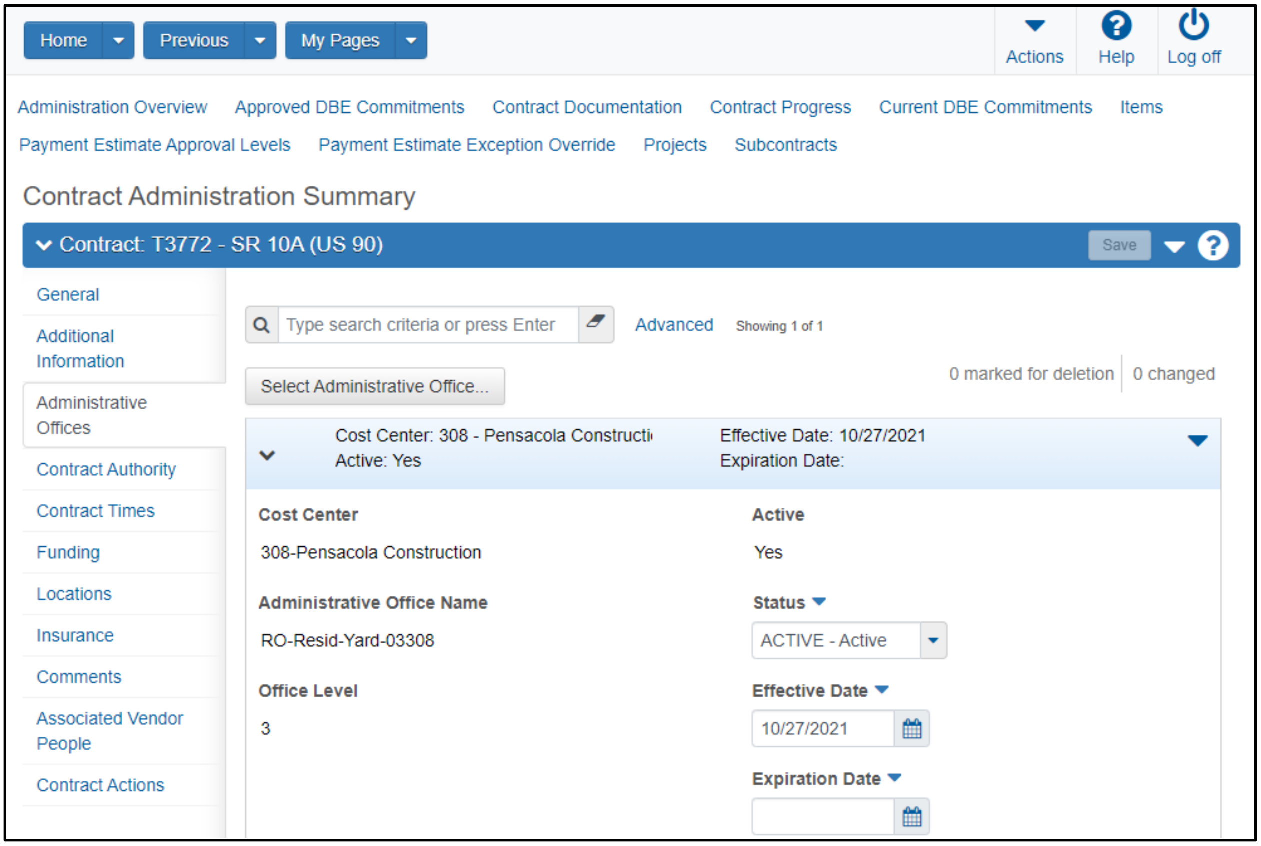


Figure 25. Contract Administration Summary – Administrative Offices Tab

Instructions 26

Navigation: Construction > Contract Administration Summary > Administrative Office tab

To add an administrative office:

1. Click the **Administrative Offices** tab.
2. Click the **Select Administrative Office** button.
3. Search for and select the row for the office to add to the contract. **(Select your own cost center)**
4. Click the **Add to Contract** button.
5. If needed, click the expand arrow for the new office row.
6. In the **Status** field, click the drop-down arrow and select the status of the office. **(ACTIVE)**

7. In the **Effective Date** field, enter the date the office becomes effective. **(Today's Date)**
8. In the **Expiration Date** field, enter the date that approval or effectiveness ends for the office, if appropriate.

   In general, FDOT recommends waiting to enter the Expiration Date until the date occurs.
9. Click the **Save** button.
10. Verify the **Active** field contains *Yes*, based on the effective date, expiration date, and the status.

Maintaining Contract Authority

The Contract Authority tab on the Contract Administration Summary component contains all the contract authority information that has been recorded for this contract. Contract authority works in conjunction with other security features to give users the authority to access and change contract information.

Note: Contract authority must be assigned at the level of the user role. Thus, if a user has multiple roles, and will be working on the same contract under those multiple roles, then contract authority must be assigned to the user for each of the roles.

Note: Once the contract is activated, the District Office Administrator will provide the initial contract authority to the Project Administrator, Additional specific contract authority will be provided by the Project Administrator managing the contract.

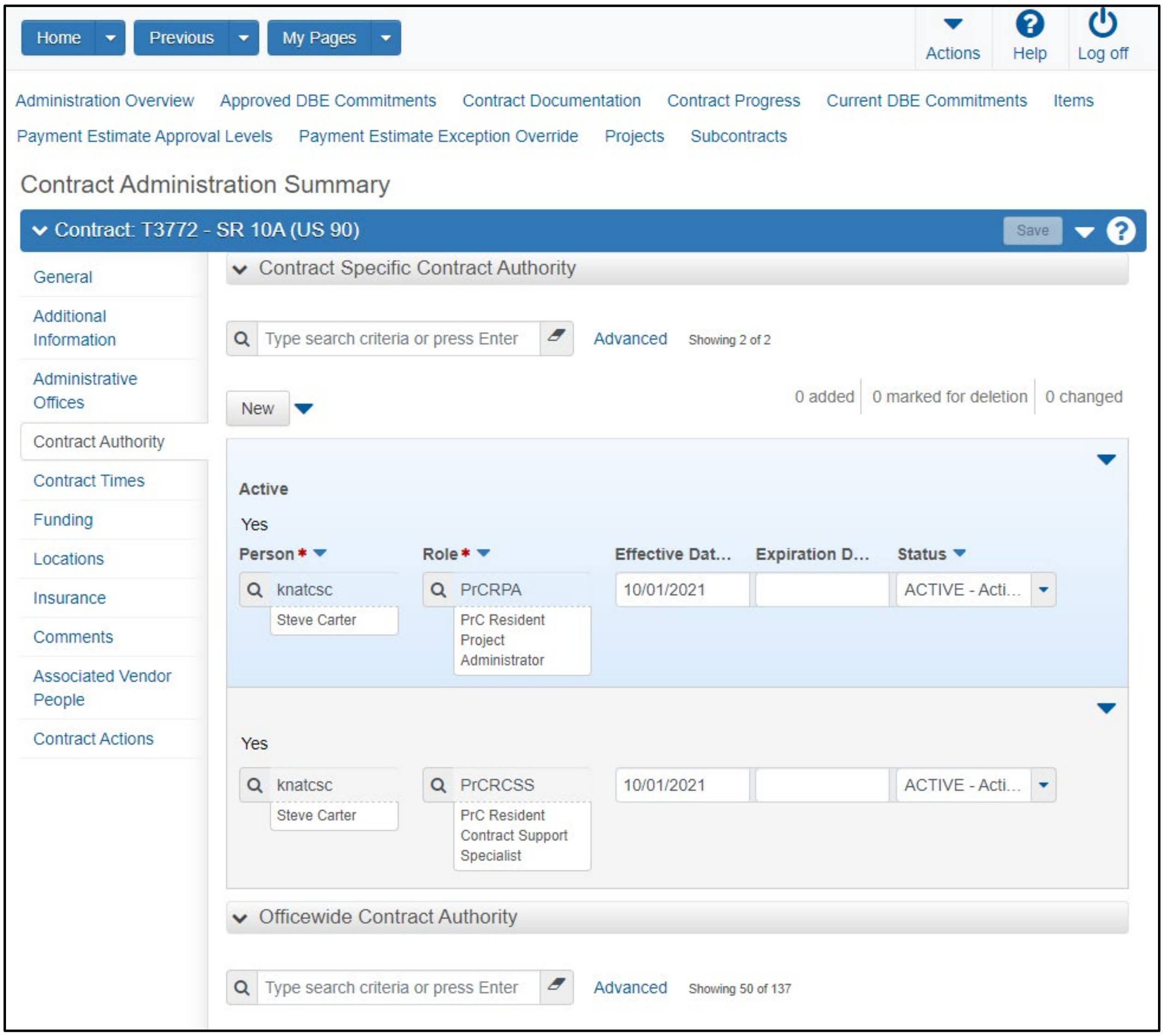


Figure 26. Contract Administration Summary – Contract Authority Tab

Instructions 27

Navigation: Construction > Contract Administration Summary > Contract Authority tab

To maintain contract authority:

1. Click the **Contract Authority** tab.
2. View the contract authority information on the contract.

Maintaining Contract Specific Contract Authority

This section contains a list of all the contract authorities that have been assigned specifically for this contract, listed by person.

Required fields are:

- Person
- Role

Note: For Info Tech® Mobile Inspector™, users must be assigned contract-specific contract authority in order to access contract data and enter DWR information in the mobile applications. Assigning *All Contract Access* or inheriting office-wide contract authority does not provide the user with contract access in the mobile application.

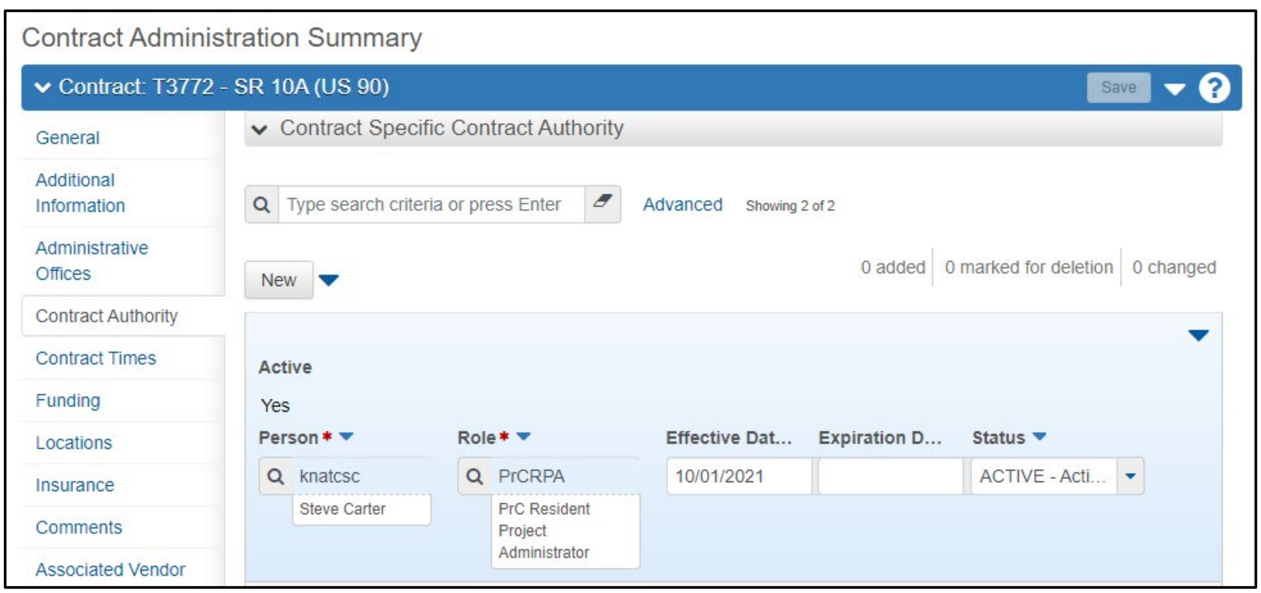


Figure 27. Contract Authority Tab – Contract Specific Contract Authority

Instructions 28

Navigation: Construction > Contract Administration Summary > Contract Authority tab

To add information on the Contract Specific Contract Authority tab:

1. Switch to the appropriate role (**PrCCenOffAdmin)**
2. In the **Contract Specific Contract Authority** section, to grant contract specific authority to a user and role, click the **New** button.
3. In the **Person** field, enter the name of the person for whom you are assigning contract authority. **(In training, select yourself)**
4. In the **Role** field, enter the role of the person for whom you are assigning contract authority. **(In training, select PrC Resident Project Administrator)**
5. In the **Effective Date** field, enter the date the contract authority becomes effective for the person. **(Today's date)**
6. In the **Expiration Date** field, enter the date the contract authority ends for the person.

   In general, FDOT recommends waiting to enter the Expiration Date until the date occurs.
7. In the **Status** field, click the drop-down arrow and select the status for the record. **(ACTIVE)**
8. Repeat these steps until all assigned project personnel have been granted contract specific contract authority for their roles. **(For training, enter all rows listed in the table below)**
9. Click the **Save** button.

Person	Construction Role	Effective Date	Status
Select yourself	PrC Inspector (PrCInspector)	Today	Active
Select yourself	PrC Lead Inspector (PrCLDInspector)	Today	Active
Select yourself	PrC Resident Contract Support Specialist (PrCRCSS)	Today	Active
Select yourself	PrC Resident Project Administrator (PrCRPA)	Today	Active
Select yourself	PrC Final Estimates Staff (PrCFinalEstStaff)	Today	Active

Table 1. Training-Only Data for Construction

Viewing Office-Wide Contract Authority

This section contains a list of all the office-wide contract authorities in the system that would include this contract, listed by person. The information in this list is view only and cannot be changed.

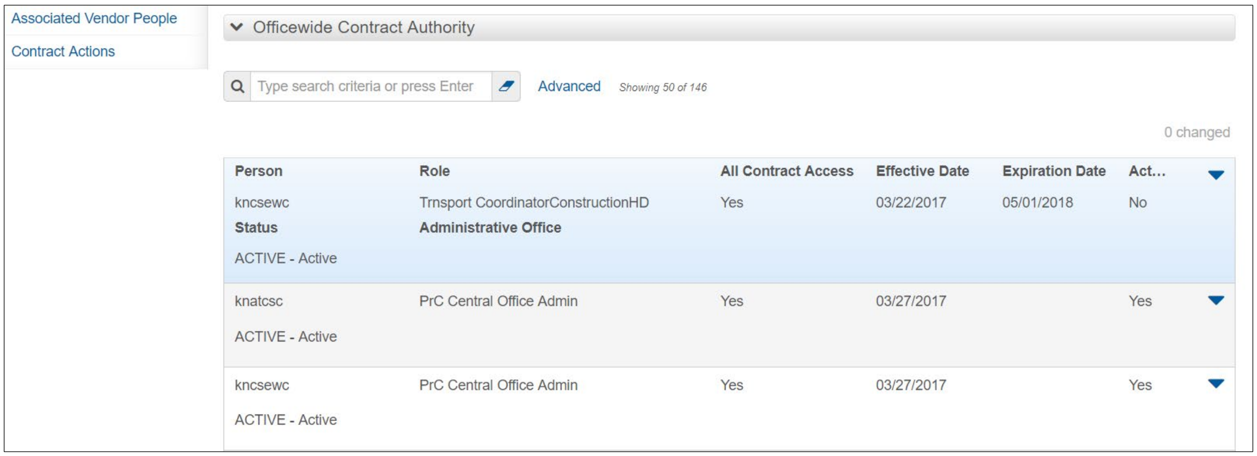


Figure 28. Contract Authority Tab – Officewide Contract Authority

Instructions 29

Navigation: Construction > Contract Administration Summary > Contract Authority tab

To view information on the Contract Authority tab:

1. In the **Office wide Contract Authority** section, view the information.

Maintaining Contract Times

The Contract Times tab enables you to add date information to the contract. The contract date information can be set up as informational time, site time, or recurring time.

For more detailed instructions on contract times, see the *Managing Contract Times* section in this chapter.

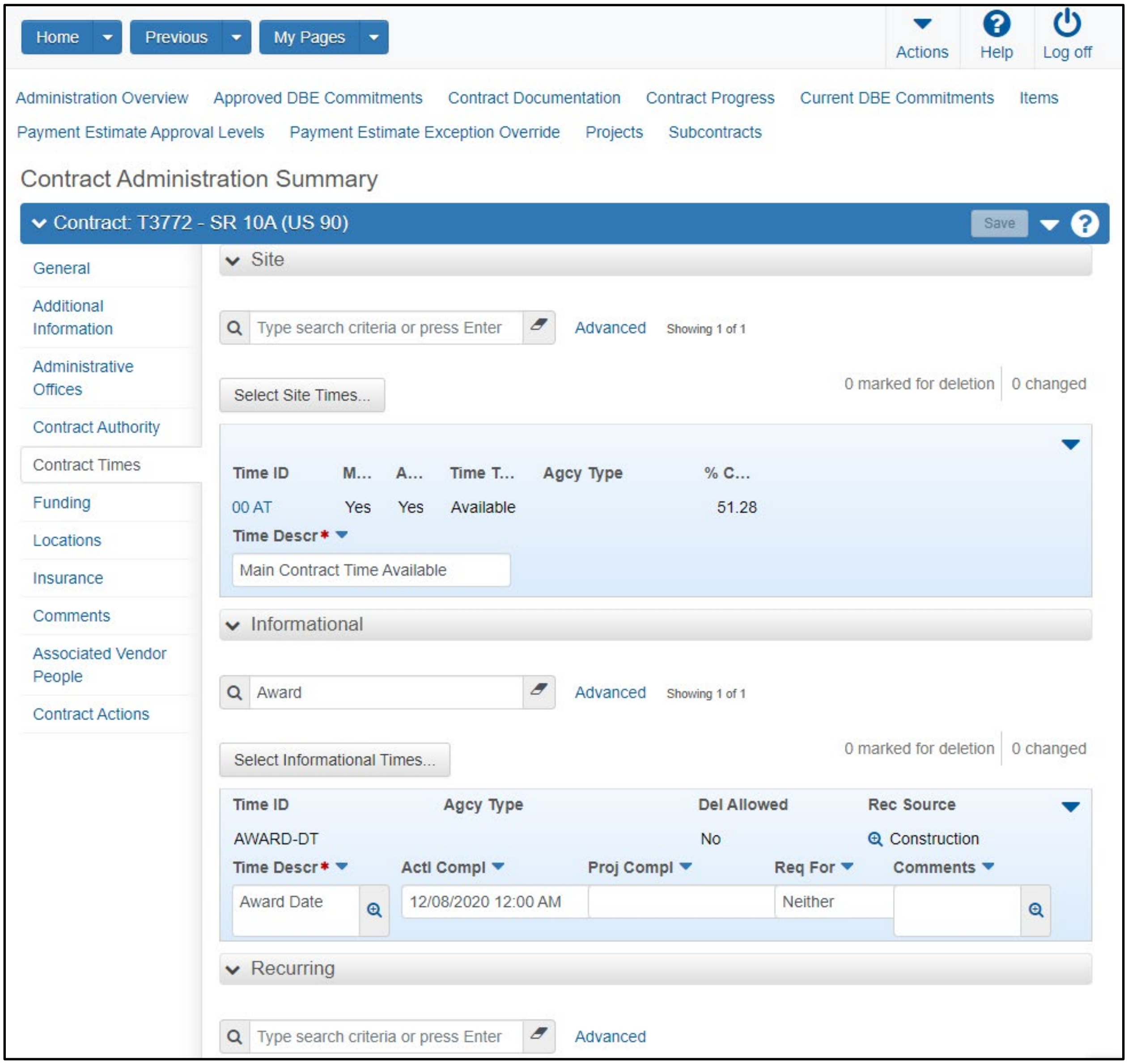


Figure 29. Contract Administration Summary – Contract Times Tab

Instructions 30

Navigation: Construction > Contract Administration Summary > Contract Times tab

To maintain contract times:

1. Click the **Contract Times** tab.
2. View the contract time information.

Viewing Contract Funding

The Contract Funding tab enables you to view and maintain funding information for the contract.

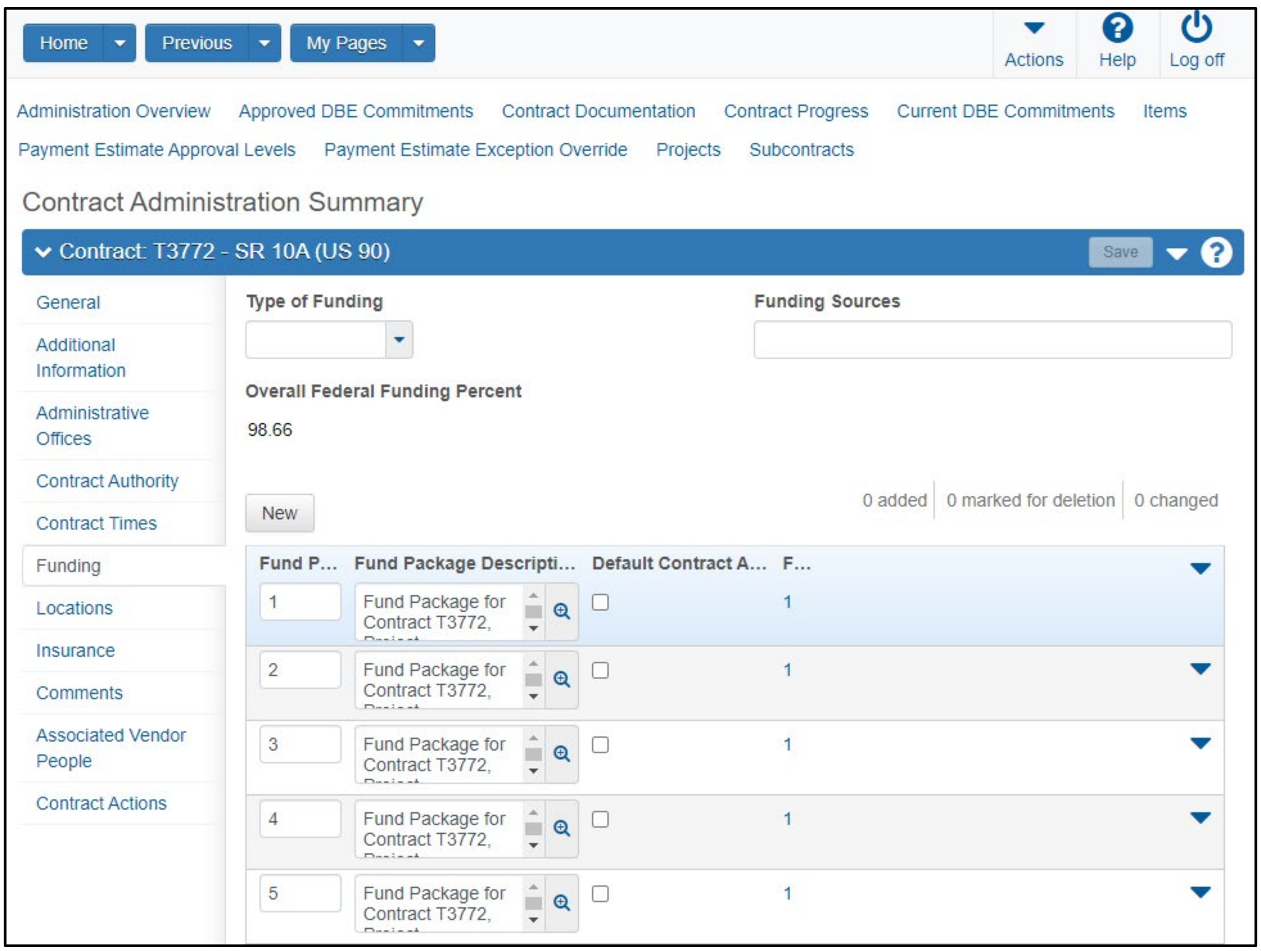


Figure 30. Contract Administration Summary –Funding Tab

Instructions 31

Navigation: Construction > Contract Administration Summary > Funding tab

To maintain contract funding:

1. Click the **Funding** tab.
2. View the contract funding information.

Viewing Contract Locations

The Locations tab contains information related to where work will take place for all the projects in the contract, as defined in the project records. This information is view only and cannot be changed in this tab.

For instructions on adding locations, see the *Managing Contract Projects* chapter of this training guide.

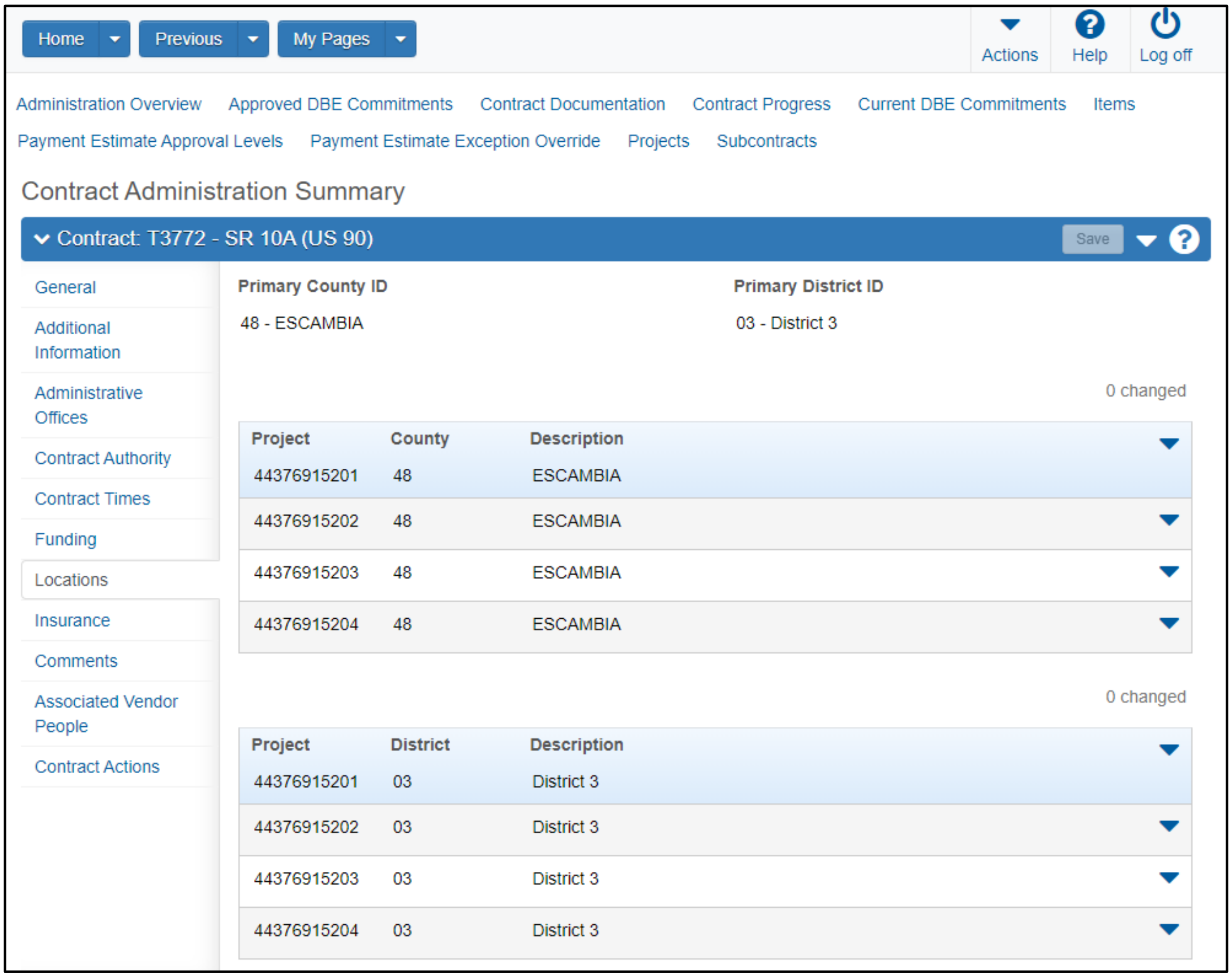


Figure 31. Contract Administration Summary –Locations Tab

Instructions 32

Navigation: Construction > Contract Administration Summary > Locations tab

To view information on the Locations tab:

1. Click the **Locations** tab.
2. View the contract's location information.

Maintaining Contract Insurance

The Insurance tab on the Contract Administration Summary component contains an accordion list of all the insurance policies on record for the contract's prime contractor.

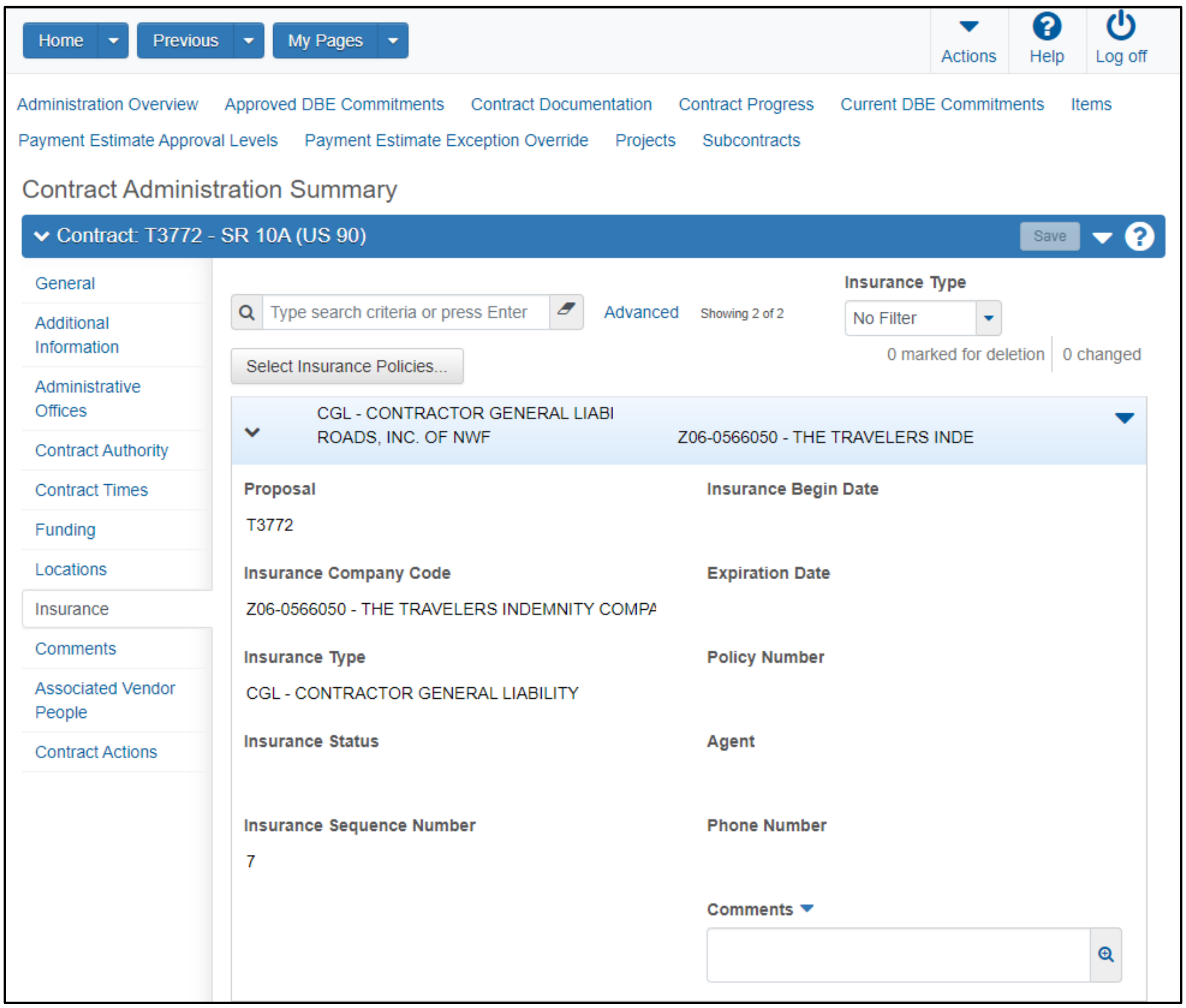


Figure 32. Contract Administration Summary – Insurance Tab

Instructions 33

Navigation: Construction > Contract Administration Summary > Insurance tab

To view information on the Insurance tab:

1. Click the **Insurance** tab.
2. View the contract's insurance information. (**In training, no insurance information is available**)

   Contract insurance information will transition from AASHTOWare Project Preconstruction.

3. If no information is populated for this tab, or if changes are needed, please notify the appropriate personnel in the Central Office .

Viewing Contract Comments

The Comments tab lists any comments that were entered when the contract was closed or reopened. If a contract is closed, entering comments is optional. If a contract is reopened, entering comments is required. Comments are entered on the General tab.

Instructions 34

Navigation: Construction > Contract Administration Summary > Comments tab

To view information on the Comments tab:

1. Click the **Comments** tab.
2. View the information. **(No information is available yet for the contract.)**

Viewing Associated Vendor People

The Associated Vendor People tab contains information about the vendor staff and personnel associated with this contract. Employees of the vendor who are paid on a salaried basis are referred to as vendor staff. Vendor personnel are employees of the vendor who are paid on an hourly basis

Information is displayed in separate sections for staff and personnel. You can view but not change information on this tab.

See the section on *Managing Contract Vendor Assets* later in this chapter for more information on how vendor people are added and maintained on the contract.

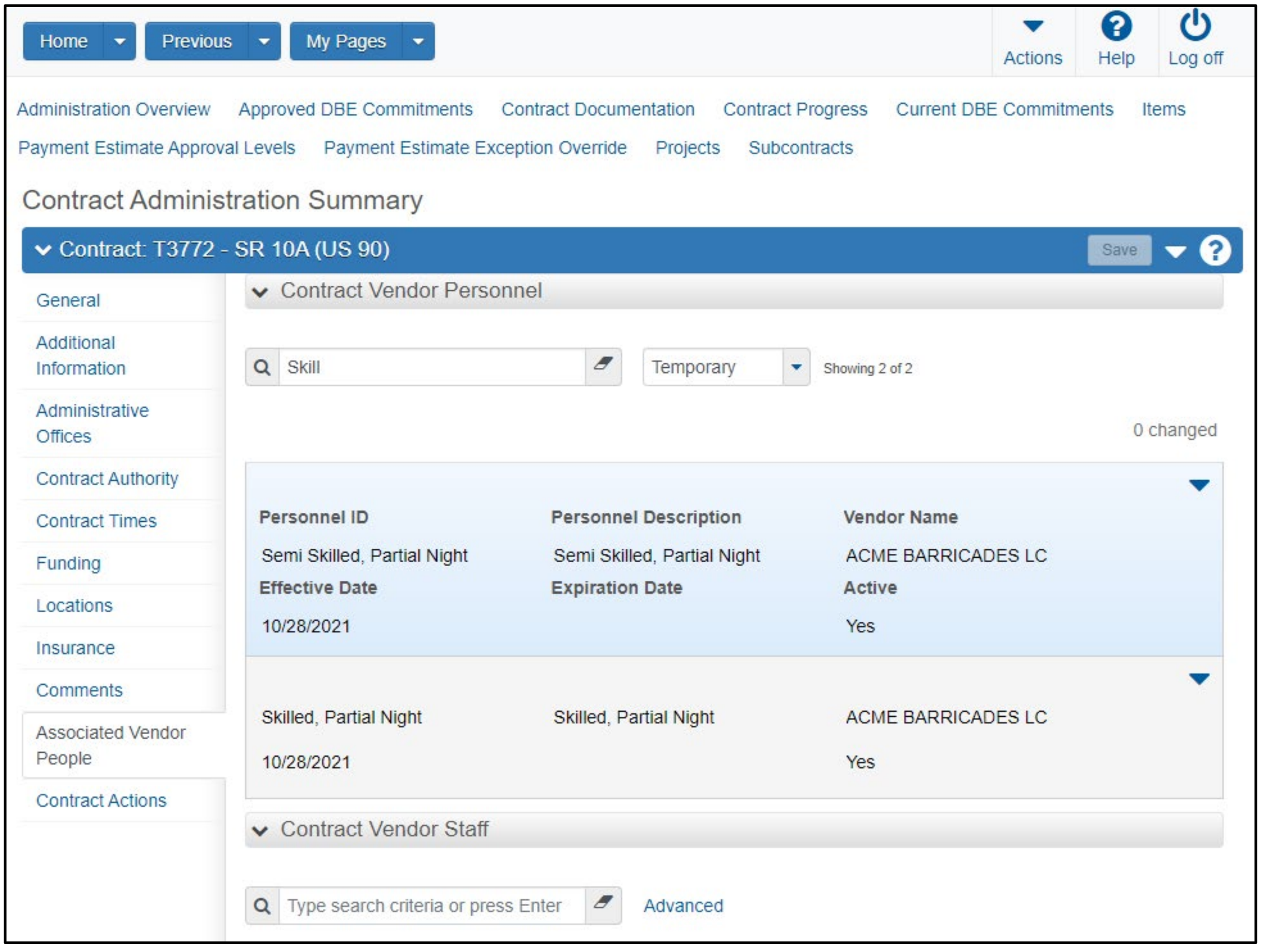


Figure 33. Contract Administration Summary –Associated Vendor People Information Tab

Instructions 35

Navigation: Construction > Contract Administration Summary > Associated Vendor People tab

To view information on the Associated Vendor People tab:

3. Click the **Associated Vendor People** tab.
4. View the information. **(No information is available yet for the contract.)**

Importing DWR Agency View Reference Item Associations

An agency view is a custom component FDOT created to support business functions or workflows that are specific to FDOT. FDOT determines which fields are included and designs the layout of the component. An agency view can include the same controls and user interface elements as other components, such as lists, fields, and modal windows.

Agency views can be used to record additional item posting usage data on a Daily Work Report. Agency views are developed by FDOT. Your system administrator can create agency views to meet FDOT's specific business needs or workflow. For FDOT personnel to use agency views to record item information on a Daily Work Report (DWR), FDOT personnel must first associate the agency view with the reference item and then add that association to the corresponding contract item.

Note: You can import DWR agency view reference item associations before contract activation or after activation.

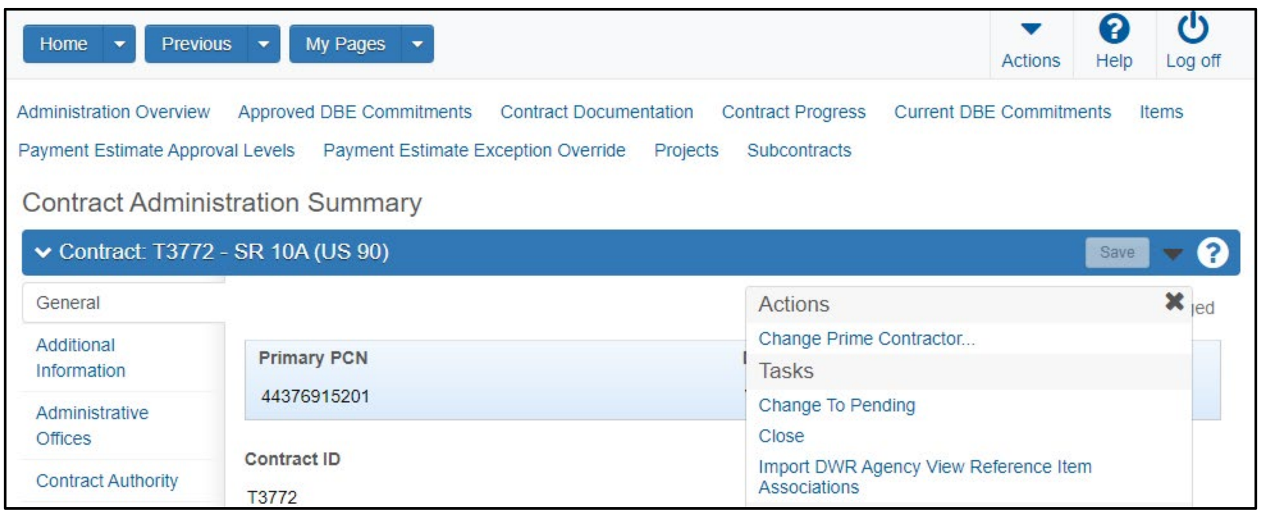


Figure 34. Import DWR Agency View Reference Item Associations

Instructions 36

Navigation: Construction > Contract Administration

To import DWR agency view reference item associations:

1. Click the contract component **Actions** button.
2. Select the **Import DWR Agency View Reference Item Associations** task.

Managing Contract Projects

The Contract Project Overview component contains a list of all the projects currently associated with the contract. Each row represents one contract project record.

After the transition from AASHTOWare Project Preconstruction and prior to contract activation, you can add a new project with project items. After contract activation, you can still add a new project. However, the new project items would have to be added via change order.

Maintaining a Contract Project

Required fields are:

- Project ID
- Project Spec Book
- Unit System
- Project Description

Note: In training, the projects were included in the transition from AASHTOWare Project Preconstruction. You will review and update the project data for your contract.

Note: In training, there are five projects associated to your contract. In class, you will update one of the projects, but outside of training you would ensure that all projects on the contract were updated appropriately.

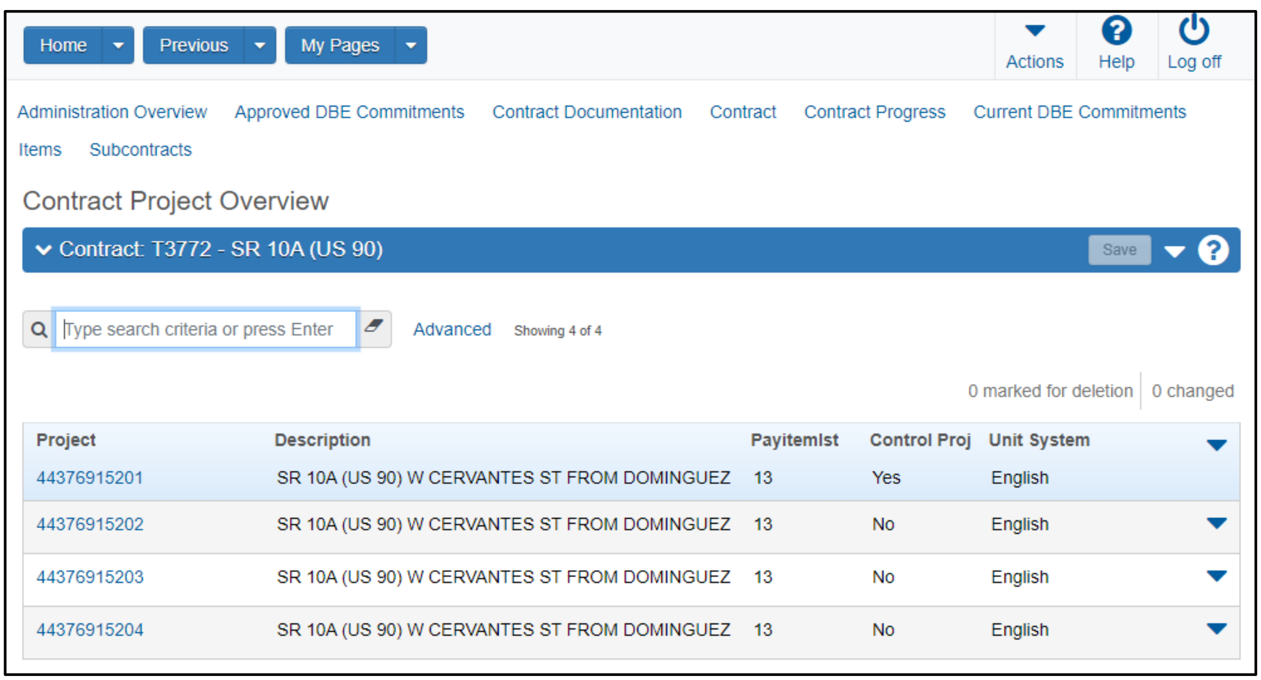


Figure 35. Contract Project Overview

Instructions 37

Navigation: Construction > Contract Administration > Projects quick link

To maintain a contract project:

1. Click the **Projects** quick link.

2. Select a **Project** by clicking the appropriate Project ID. **(TRXX6915201**; where XX is your assigned contract number)

3. In the **Contract ID** field, view the unique identifier for the contract.

4. In the **Project ID** field, view the identification name or number assigned to this project.

5. In the **Pay Item List** field, view the specification book year.

   Even though this is a text field, rather than a drop-down list, a valid Spec Book value must be used, or no items will available to be added to the project.

6. In the **Unit System** field, view the system of measurement used for item quantities, either English or Metric.

7. In the **Project Description** field, view the description for the project.

8. In the **Federal Aid Number** field, view the project number assigned by the federal government.

9. In the **Lead Project Designer** drop-down, select the lead project designer. (**When needed, select a value)**

10. In the **Project Urban/Rural** field, click the drop-down arrow and view the appropriate indicator of the population density in the area where the work is to be performed for the project. **(When needed, select a value**)

11. Click the **Project Fed Oversight Indicator** check box to indicate that federal authorities must receive and approve any change orders for this contract project**. (When needed, select the check box)**

12. Click the **Project State Oversight Indicator** check box if local authorities must receive and approve any change orders for the contract project. **(When needed, select the check box)**

13. Click the **Controlling Project** check box if this is the controlling project in a contract that contains multiple projects. **(In training, leave as-is)**

14. Review the project **Primary County** field.

15. Review the project **Primary District** field.
16. In the **Project Location** field, input the location where the project work is taking place. **(From south of Luckett Road to south or SR 80)**
17. In the **Original Project Amount** field, view the project total as originally approved on the contract.
18. In the **Current Project Amount** field, view the current project total, including any changes made to the original amount.
19. In the **Project Type** field, view the value that indicates the type of project.
20. In the **Project Funding Sources** field, view the governmental agencies providing the funding for the contract project.
21. In the **Project Work Type** field, view the kind of work to be performed in this project.
22. In the **Project Work Mix** field, view the value.
23. Click the **Save** button.

Viewing Contract Project Categories

The Categories tab on the Contract Project Summary component contains an accordion list of all the categories in the contract project. Each row in the list represents one category.

Required fields are:

- Category ID
- Category Description

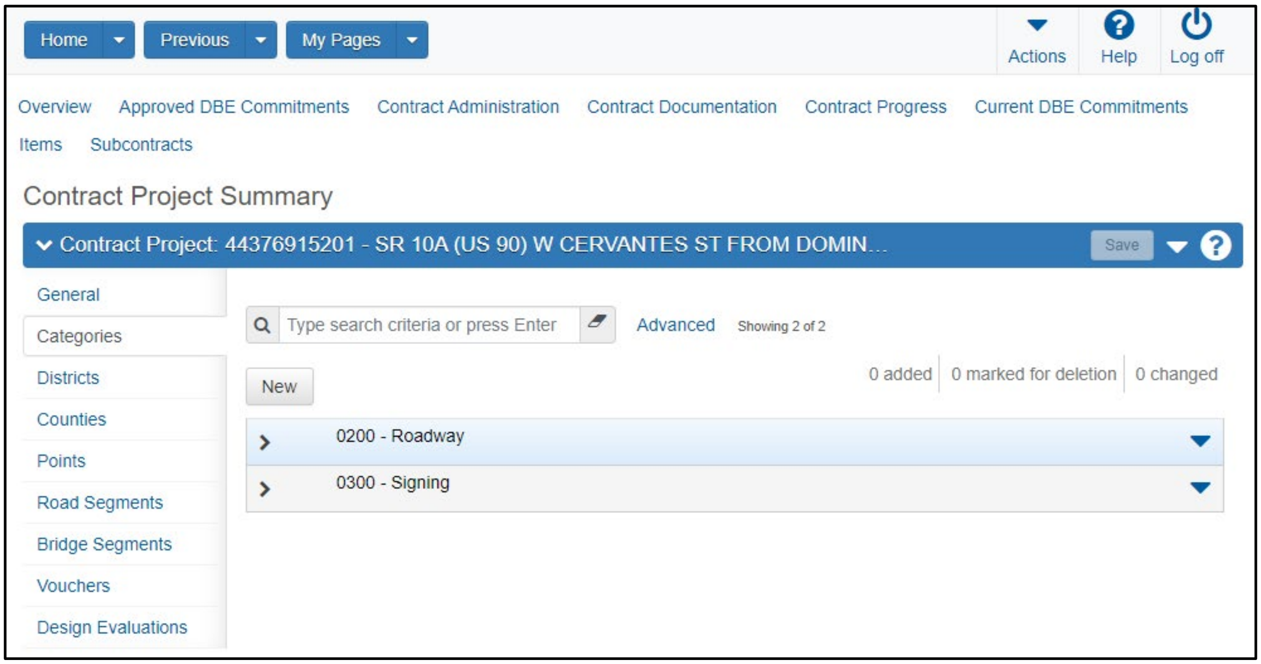


Figure 36. Contract Project Summary – Categories Tab

Instructions 38

Navigation: Construction > Contract Administration Summary > Projects quick link > Categories tab

To view information on the Categories tab:

1. Click the **Categories** tab.
2. Click the **Category** row to expand the highlighted category. **(0200 – Roadway)**
3. In the **Category ID** field, view the identification name or number assigned to this project category.
4. For maintenance activities only, in the **Maintenance Activity Number** drop-down field, the applicable value will be selected.
5. The **Combine Like Categories** check box will be selected if the category should be combined with other categories that have the same Section Group into a single proposal section. **(Selected)**
6. In the **Section Group** field, view which categories will be grouped into a proposal section.
7. In the **Category Description** field, view the description for the category.
8. In the **Structure Work Class** field, view the structure work class selected.
9. In the **Structure Work Type** field, view the structure work type selected.
10. In the **Super Structure Type** field, view the super structure type selected.
11. In the **Sub Structure Type** field, view the sub structure type selected.
12. In the **Foundation Type** field, view the foundation type selected.
13. In the **Structure Location** field, view the structure location selected.
14. In the **Category Designer** field, view the code for the design firm.
15. In the **Bridge Number** field, identify the bridge number related to the category.
16. In the **Project Type** field, view the project type.

Viewing Contract Project Districts

A district is a division of territory within a state marked off for administrative purposes. The Districts tab on the Contract Project Summary component contains a rolling list of all the recorded districts in the contract project. When there are multiple districts in a contract project, one may be selected as the primary district.

Required fields are:

- District ID

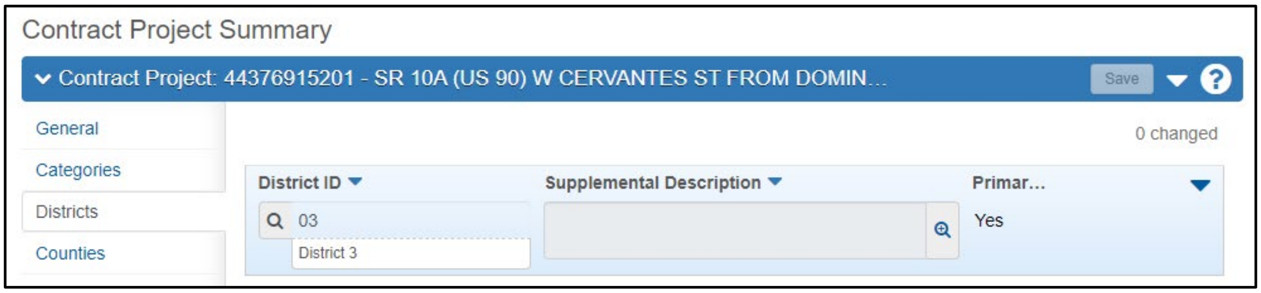


Figure 37. Contract Project Summary – Districts Tab

Instructions 39

Navigation: Construction > Contract Administration Summary > Projects quick link > Districts tab

To view information on the Districts tab:

1. Click the **Districts** tab.
2. In the **District ID** field view the identification name or number assigned to this district.
3. In the **Supplemental Description**, view additional information describing the district.
4. The **Primary** check box indicates whether this is the primary district.

Viewing Contract Project Counties

The Counties tab on the Contract Project Summary component contains a rolling list of all the counties in the contract project. When there are multiple counties in a contract project, one may be selected as the primary county.

Note: The sum of the county percentages on a project must always equal 100.

Required fields are:

- County ID
- Percentage

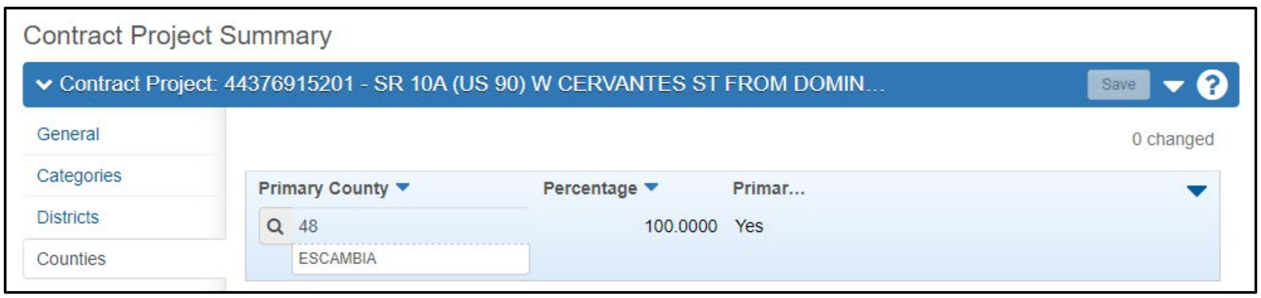


Figure 38. Contract Project Summary – Counties Tab

Instructions 40

Navigation: Construction > Contract Administration Summary > Projects quick link > Counties tab

To view information on the Counties tab:

1. Click the **Counties** tab.
2. View the counties associated to the contract project.

Viewing Contract Project Points

A project point is a location that can be described by a single latitude and longitude measurement. A point can be used to locate a specific site for project work or the site for a portion of the project's work.

Required fields are:

- Type
- Latitude
- Longitude
- Description

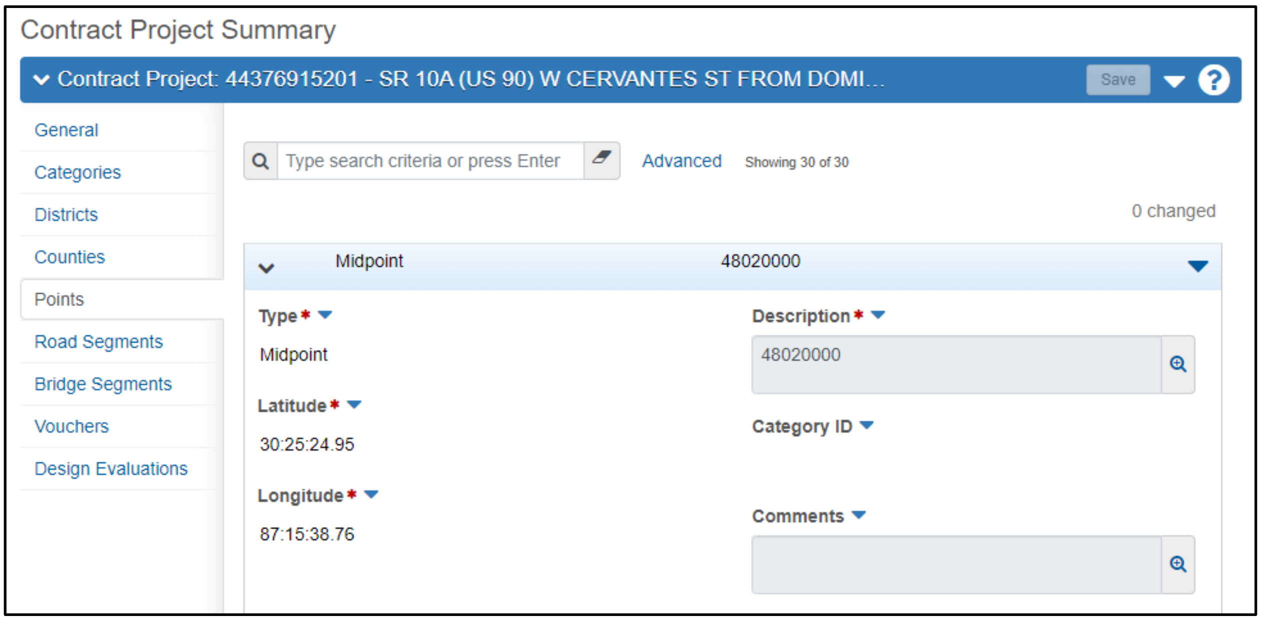


Figure 39. Contract Project Summary – Points Tab

Instructions 41

Navigation: Construction > Contract Administration Summary > Projects quick link > Points tab

To view information on the Points tab**:**

1. Click the **Points** tab.
2. Click a row to expand the selected **Point. (Midpoint)**
3. In the **Type** field, view the kind of location point.
4. In the **Latitude** field, view the latitude of the location point.
5. In the **Longitude** field, view the longitude of the location point.
6. In the **Description** field, view a description for the point.
7. In the **Category ID** field, view the project category for the point.
8. View the **Location** section.

Viewing Contract Project Road Segments

A road segment is a portion of a road that can be described by a set of starting and ending latitude and longitude measurements. A road segment can also be described by termini or stationing. A road segment can be used to locate a specific section of a road as the site for a project's work or a portion of the project's work.

Required fields are:

- Description

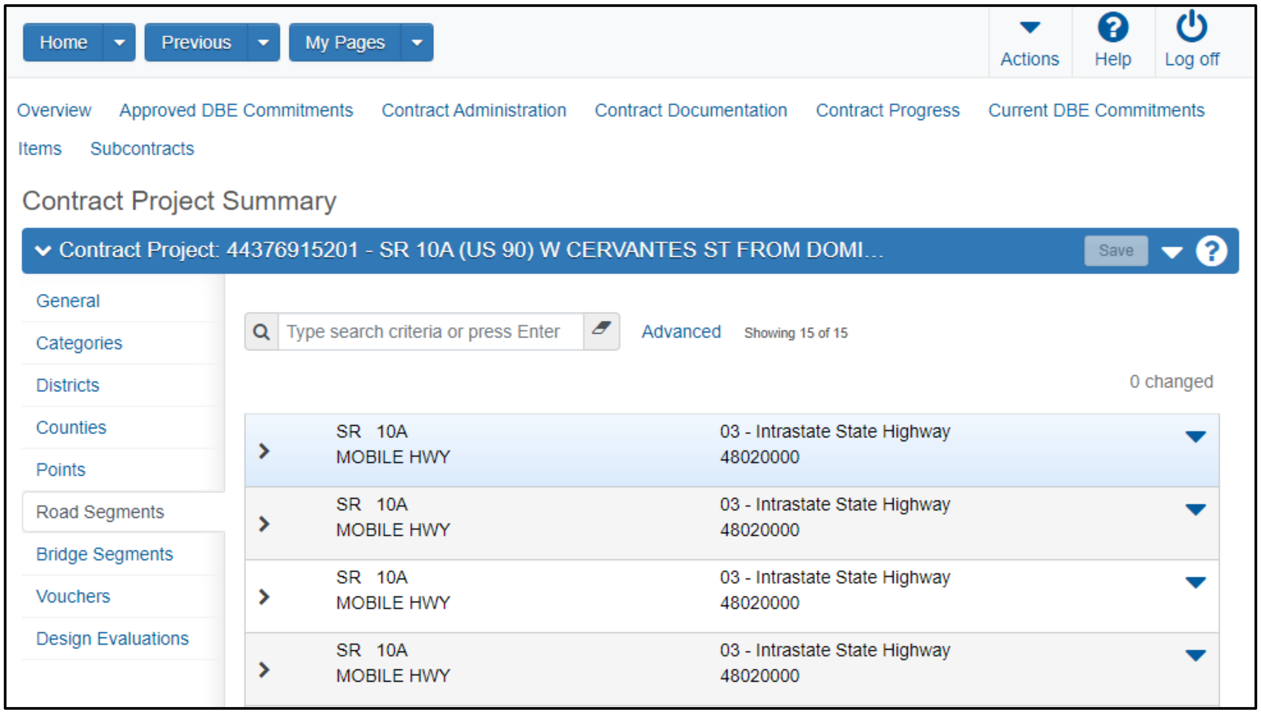


Figure 40. Contract Project Summary – Road Segments Tab

Instructions 42

Navigation: Construction > Contract Administration Summary > Projects quick link > Road Segments tab

To view information on the Road Segments tab:

1. Click the **Road Segments** tab.
2. Click a row to expand the selected **Road Segment. (First row)**
3. In the **Name** field, view the name of the road segment.
4. In the **Number** field, view the number of the road of which the road segment is a part.
5. In the **Description** field, view the description for the road segment.
6. In the **Type** field, view the kind of road of which the road segment is a part.
7. In the **Route** field, enter the route number of the road.
8. In the **Lane Mile** field, view the number of lane miles.
9. In the **Length** field, view the length of the road segment.
10. In the **Width** field, view the width of the road segment.
11. In the **Depth** field, view the depth of pavement in the road segment.
12. In the **Start Latitude** field, view the latitude of the starting point of the road segment.
13. In the **Start Longitude** field, view the longitude of the starting point of the road segment.
14. In the **End Latitude** field, view the latitude of the end point of the road segment.
15. In the **End Longitude** field, view the longitude of the end point of the road segment.
16. In the **Begin Termini** field, view an identifier for the beginning boundary of the road segment.
17. In the **End Termini** field, view the identifier for the ending boundary of the road segment.
18. In the **Begin Station** field, view the station identification for the beginning of the road segment.
19. In the **End Station** field, view the station identification for the end of the road segment.
20. In the **Category ID** drop-down field, view the project category for the road segment.

21. In the **Comments** field, view the comments for the road segment.

22. In the **Location** section, view the spatial coordinate information for the road segment.

View Contract Project Bridge Segments

A bridge segment is a portion of a bridge that can be described by a set of starting and ending latitude and longitude measurements. A bridge segment can be used to locate a specific section of a bridge as the site for a project's work or a portion of the project's work. It can also refer to an entire bridge.

Required fields are:

- Bridge ID
- Description

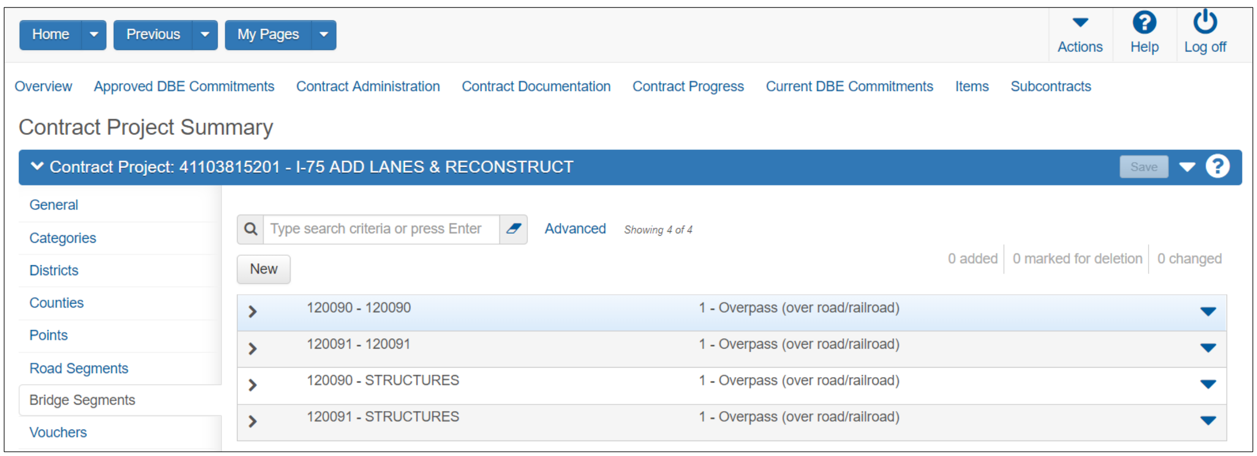


Figure 41. Contract Project Summary –Bridge Segments Tab

Instructions 43

Navigation: Construction > Contract Administration Summary > Projects quick link > Bridge Segments tab

To view information on the Bridge Segments tab:

1. Click the **Bridge Segments** tab.
2. Click the **Bridge Segment** row to expand the selected bridge segment. **(Choose any row. Bridge segments may not exist on training project.)**
3. In the **Bridge ID** field, view the identification name or number assigned to the bridge.
4. In the **Description** field, view a description for the bridge segment.
5. In the **Bridge Type** drop-down field, view the kind of bridge of which the bridge segment is a part.
6. In the **Length** field, view the length of the bridge segment.
7. In the **Width** field, view the width of the bridge segment.
8. In the **Number of Spans** field, view the number of sections between two intermediate supports of the bridge.
9. In the **Start Latitude** field, view the latitude of the starting point of the bridge segment.
10. In the **Start Longitude** field, view the longitude of the starting point of the bridge segment.
11. In the **End Latitude** field, view the latitude of the end point of the bridge segment.
12. In the **End Longitude** field, view the longitude of the end point of the bridge segment.
13. In the **Category ID** drop-down field, view the project category for the bridge segment.
14. In the **Comments** field, view the comments for the bridge segment.
15. In the **Location** section, view the spatial coordinate information for the bridge segment.

Viewing Contract Project Voucher Information

The Vouchers tab on the Contract Project Summary contains a list of vouchers for payment estimates made to contractors for work on this contract project. The values in the fields are read-only.

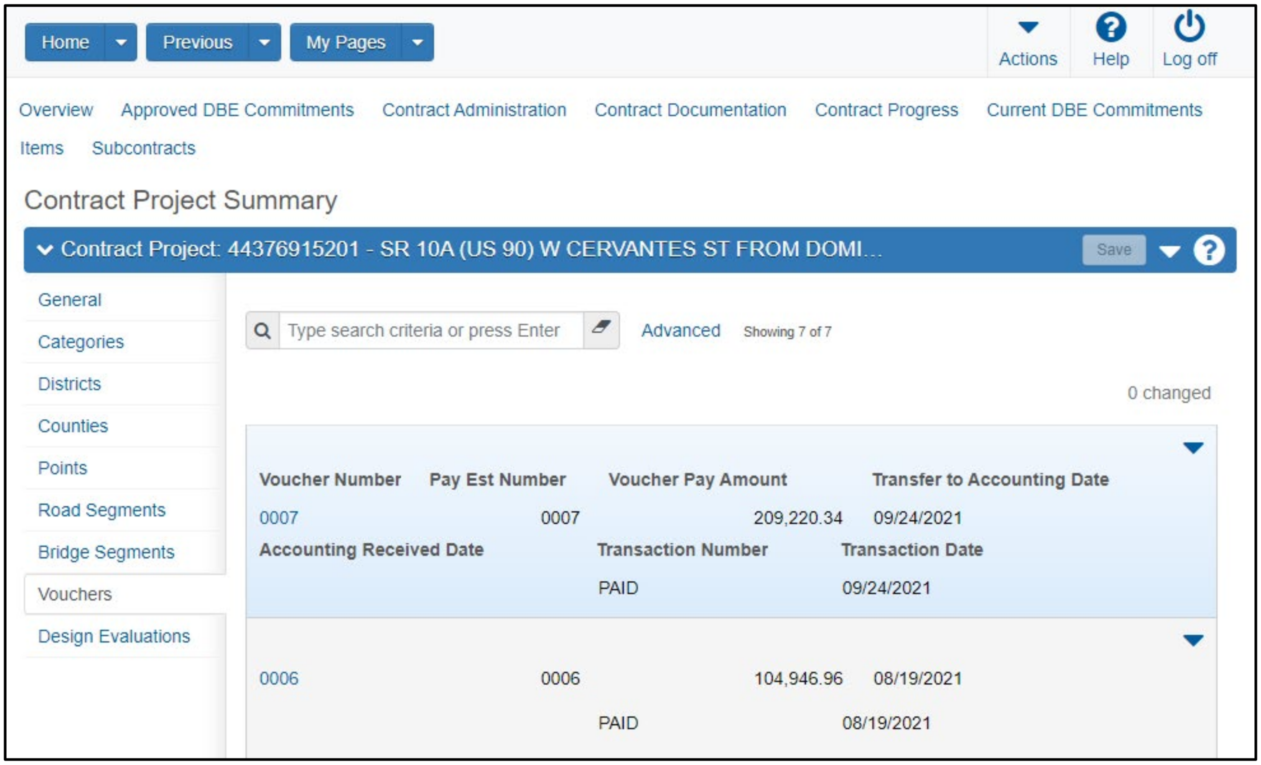


Figure 42. Contract Project Summary – Vouchers Tab

Instructions 44

Navigation: Construction > Contract Administration Summary > Projects quick link > Vouchers tab

To view information on the Vouchers tab:

1. Click the **Vouchers** tab.

2. View the information for the contract.

   Vouchers will not be available until an estimate is generated. Each voucher is linked to the associated Contract Payment Estimate Summary.

Viewing Design Evaluations Information

FDOT will not use the Design Evaluations tab on the Contract Project Summary.

Managing Contract Items

The Contract Items component provides information about all the items associated with the contract, including general items and contract project items.

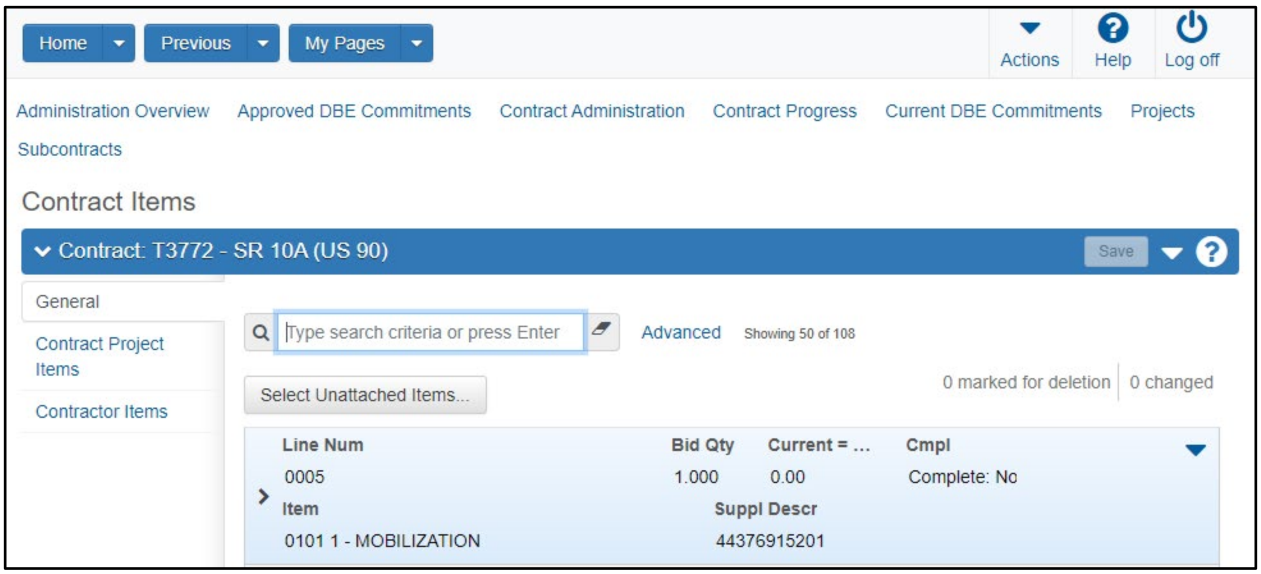


Figure 43. Contract Items

Viewing Contract Items

The General tab contains an accordion list of all of the awarded vendor's low cost items for the contract and any items that were added or modified by change orders.

Instructions 45

Navigation: Construction > Contract Administration Summary > Items Quick Link

To view contract items on the General tab:

1. Click the **Items** quick link.
2. On the **General** tab, click the expand arrow for a row to view information about the item. **(Line Num 0005)**

Maintaining Contract Project Items

The Contract Project Items tab provides a view of all the items in the contract, listed by project category.

To add an item, the contract project must have a status of Pending. You cannot add items to a contract project with an Active status. Also, if the contract was transitioned from AASHTOWare Project Preconstruction, the item to be added must have a zero unit price (non-zero unit price items can only be added with a change order).

Note: The contract must be in pending status to add items to the project in this manner. If the contract is active, you must add items via a change order.

Note: You cannot update the quantity, unit price, project line number, or contract line number for any item transitioned from AASHTOWare Project Preconstruction.

Required fields are:

- Project Item Line Number
- Bid Quantity
- Item Source
- Contract Item Line Number

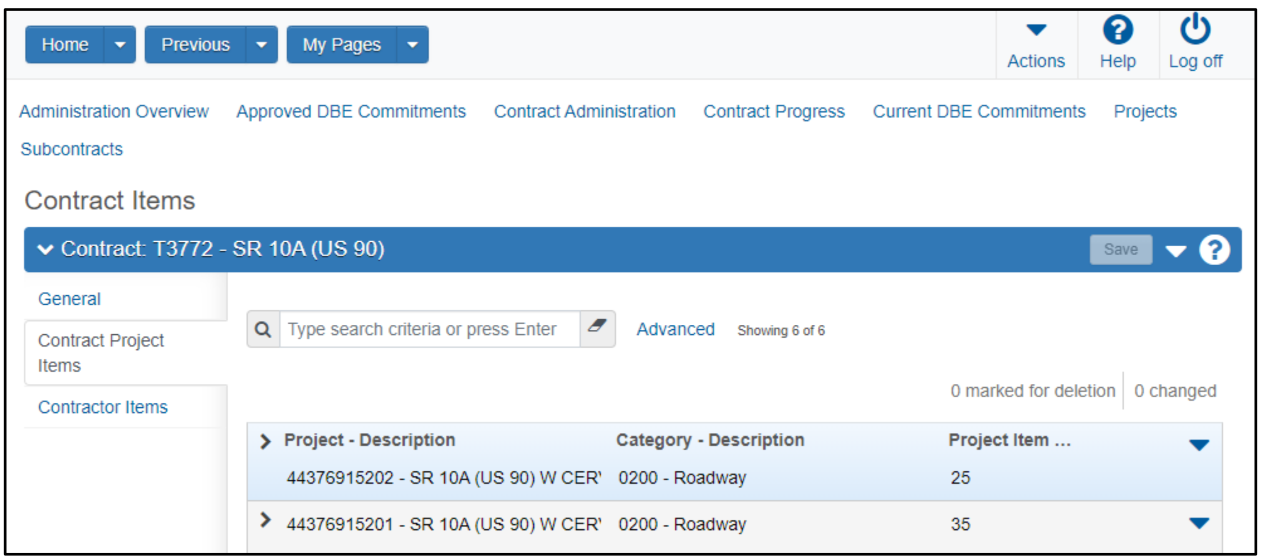


Figure 44. Contract Items – Contract Project Items Tab

Instructions 46

Navigation: Construction > Contract Administration Summary > Items Quick Link > Contract Project Items tab

To view an existing contract project items:

1. Click the **Contract Project Items** tab.
2. Click the expand arrow for the project category to review the included contract project items. **(Project TRXX6915201**, **Category 0200**, where XX is your assigned contract number**)**
3. Click the expand arrow for the contract project line number. **(Proj Ln Num 0005)**
4. In the **Project Item Line Number** field, view the line item number for the item within the project.
5. In the **Pay Item Number** field, view the number.
6. In the **Item Description** field, view the reference item description.
7. In the **Unit of Measure** field, view the item unit of measure.
8. In the **Bid Quantity** field, view the number of units of the item that are required.
9. In the **Current Quantity** field, view the current number of unit for the item.
10. In the **Pay Item List** field, view the pay item list year.
11. In the **Section ID** field, view the section ID.
12. In the **Quantity Posted To Date** field, view the quantity posted to date.
13. In the **Change Order Number** field, view the change order number, if item was added by change order.
14. In the **Pending Change Order Quantity** field, view the pending change order quantity.
15. In the **Subcontract to Date Quantity** field, view the subcontract to date quantity.
16. In the **Quantity Posted to Date Appr DWRs** field, view the total of all quantity posted entries for an item on one or more approved DWRs, regardless of whether they are included on an estimate.
17. In the **Item Reason** drop-down field, view the item reason.
18. In the **Comments** field, view any entered comments or type additional information about this contract project item.

19. In the **Contract Item Line Number** field, view the item line number within the contract.

20. In the **Percent Complete** field, view the percentage of this item that's complete.

21. In the **Supplemental Description** field, view any additional description.

22. In the **Unit Price** field, view the unit price for the item.

23. In the **Bid Quantity Extended Amount** field, view the item bid quantity extended amount.

24. In the **Current Quantity Extended Amount** field, view the item current quantity extended amount.

25. In the **Related Line Item** field, view the item group to which this item belongs, if applicable.

26. The **Critical Item** check box indicates whether this item is considered essential to the project.

27. In the **Amount Paid to Date Approved Payment Estimate** field, view the item amount paid to date on approved estimates.

28. In the **Net Change Order Quantity** field, view the item total net change order quantity.

29. In the **Pending Change Order Amount** field, view the item total pending change order amount.

30. In the **Subcontract to Date Extended Amount** field, view the item total subcontract extended amount.

31. In the **Record Source** field, view the item record source.

32. In the **Item Source** drop-down field, view where the contract item originated.

33. In the **Autogenerate Acceptance Records** field, indicate whether acceptance records will be automatically generated for DWR Item Postings when the material set is populated.

    The default value is true.

Viewing Contractor Items

The Contractor Items tab contains an accordion list that includes the prime contractor and all subcontractors associated with the contract, and lists the items assigned to each.

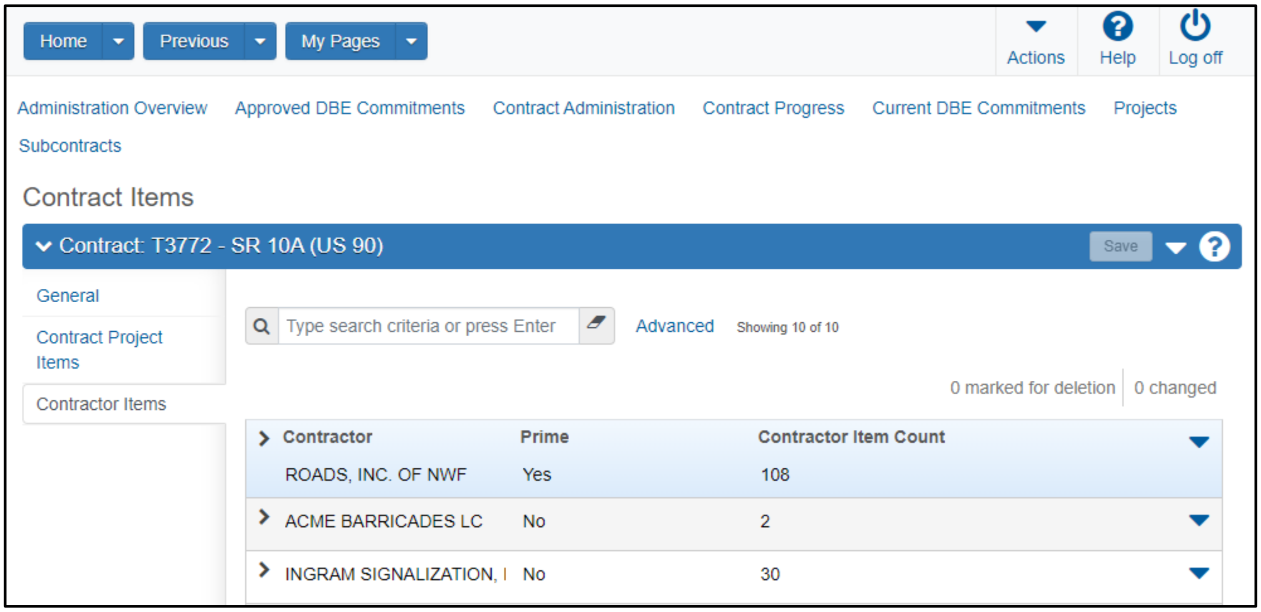


Figure 45. Contract Items –Contractor Items Tab

Instructions 47

Navigation: Construction > Contract Administration Summary > Items quick link > Contractor Items tab

To view contractor items on a contract:

1. Click the **Contractor Items** tab.
2. Click the expand arrow to view the items for a contractor. **(Prime Contractor)**
3. Click the expand arrow for the project line number to be viewed. **(Proj Ln Num 0005)**

Managing Contract Times

Contract times are records of time-related information important to the contract. There are several types of contract time records: Available Time, Calendar Time, Completion Date, and Informational. Some of the fields and values may be different depending on the type of time selected.

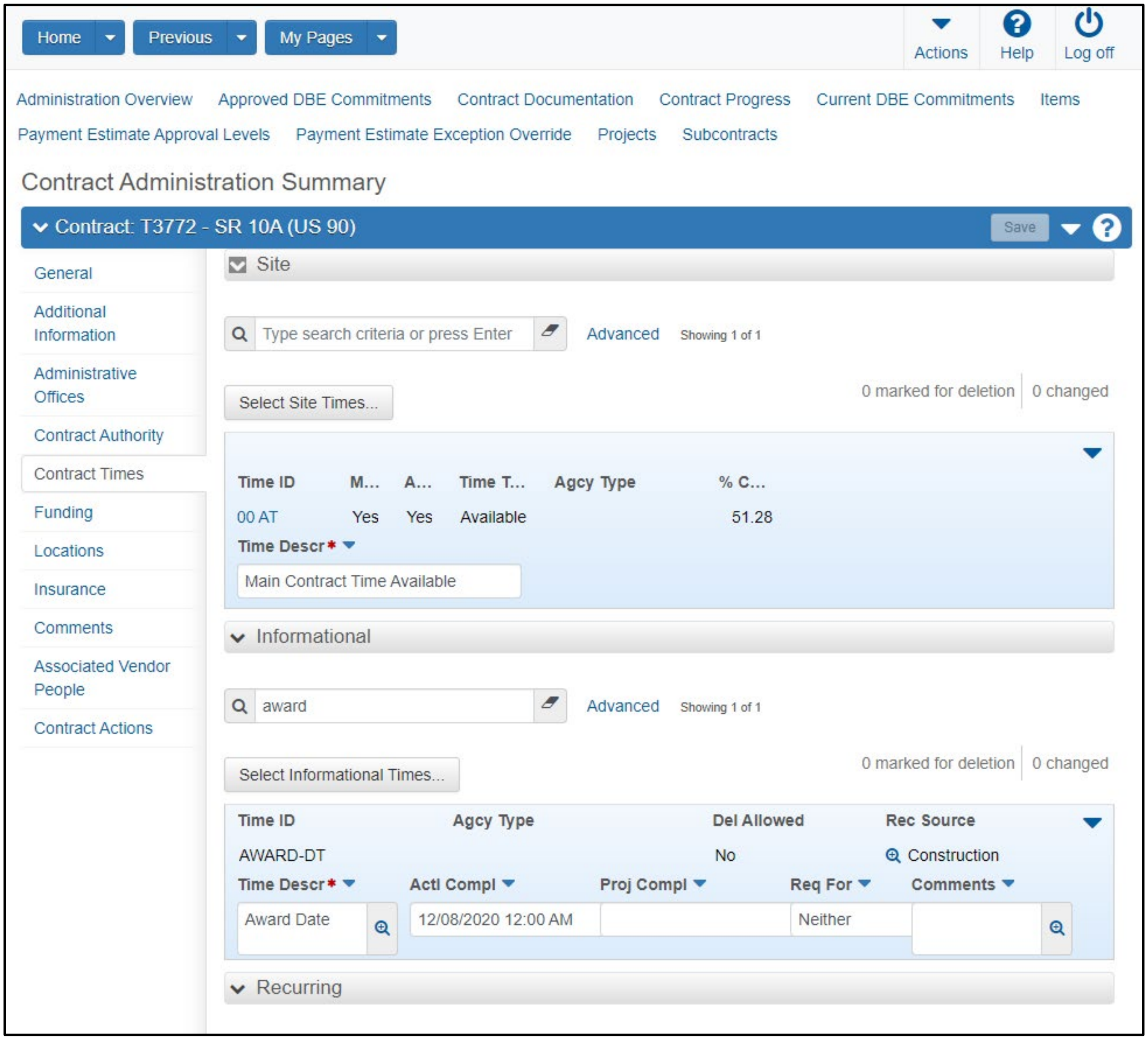


Figure 46. Contract Administration Summary – Contract Times Tab

Maintaining Site Times

The Site section contains information for each contract time record with a Time Type of Available Time, Calendar Time, or Completion Date.

Note: Some of the fields and values may be different depending on the type of time selected.

Note: To activate a contract, you must record a **Site Time** with the **Main Contract Time** check box selected.

Required fields are:

- Time Description

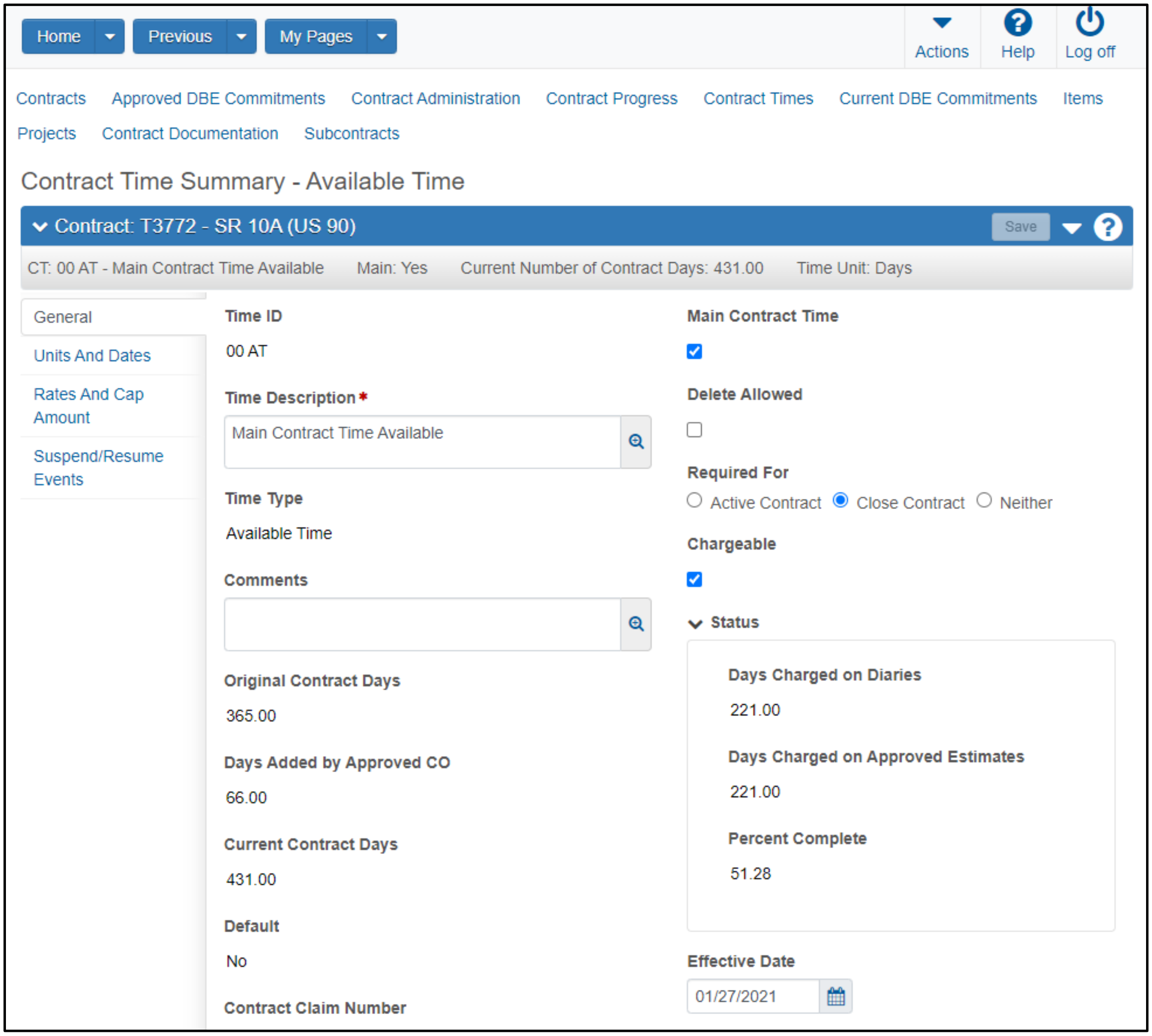


Figure 47. Contract Time Summary Component

Instructions 48

Navigation: Construction > Contract Administration Summary > Contract Times tab > Site Times section

To maintain site time records for the contract:

1. Click the **Contract Administration** quick link.
2. Click the **Contract Times** tab.
3. In the **Site** section, click the **Time ID** link to open the record. **(00 AT)**
4. On the General tab, in the **Time Description** field, view the description.
5. The **Time Type** field indicates the type of contract time. **(Available Time i.e. Working Days)**
6. When applicable, in the **Comments** field, enter additional information.
7. The **Original [Number of Time Units]/[Completion Date]** field shows the original completion units or date for the contract time, depending on the type of contract time.
8. In the **Days Added by Approved CO** field, view any adjustments made to the number of time units.
9. In the **Current Contract Days** field, view the original number of time units plus any adjustments.
10. The **Default** field indicates whether the record is a default contract time.
11. The **Contract Claim Number** field, view the contract claim number associated with this contract time.
12. The **Main Contract Time** check box indicates whether this contract time represents either the contract completion date or total amount of available contract time.
13. In the **Delete Allowed** field, indicate whether the time record can be deleted once the time record has been added to the contract.
14. In the **Required For** section, the radio button indicates whether the contract time is required to activate a contract, to complete a contract, or neither.
15. If the time type is set to Available Time, the **Chargeable** check box indicates whether time charges can be entered for the time record on DWRs or diaries.

16. The **Status** section indicates the current total number of time units charged on diaries for the contract time, the current total number of time units charged on approved estimates for the contract time, and the percentage of the contract time that has been completed.

17. In the **Effective Date** field, enter the date the time record is effective. **(Today's date)**

18. In the **Expiration Date** field, enter the date the time record expires.

    In general, FDOT recommends waiting to enter the Expiration Date until the date occurs.

19. In the **Status** field, click the drop-down arrow and select the status of the time record. **(Active)**

20. The **Active** field indicates whether the time record is active or inactive, based on the effective and expiration dates, and the status.

21. Do not click the **Save** button yet.

    You will see an error message if you click the Save button before you complete the following instructions.

Adding Site Time Units and Dates

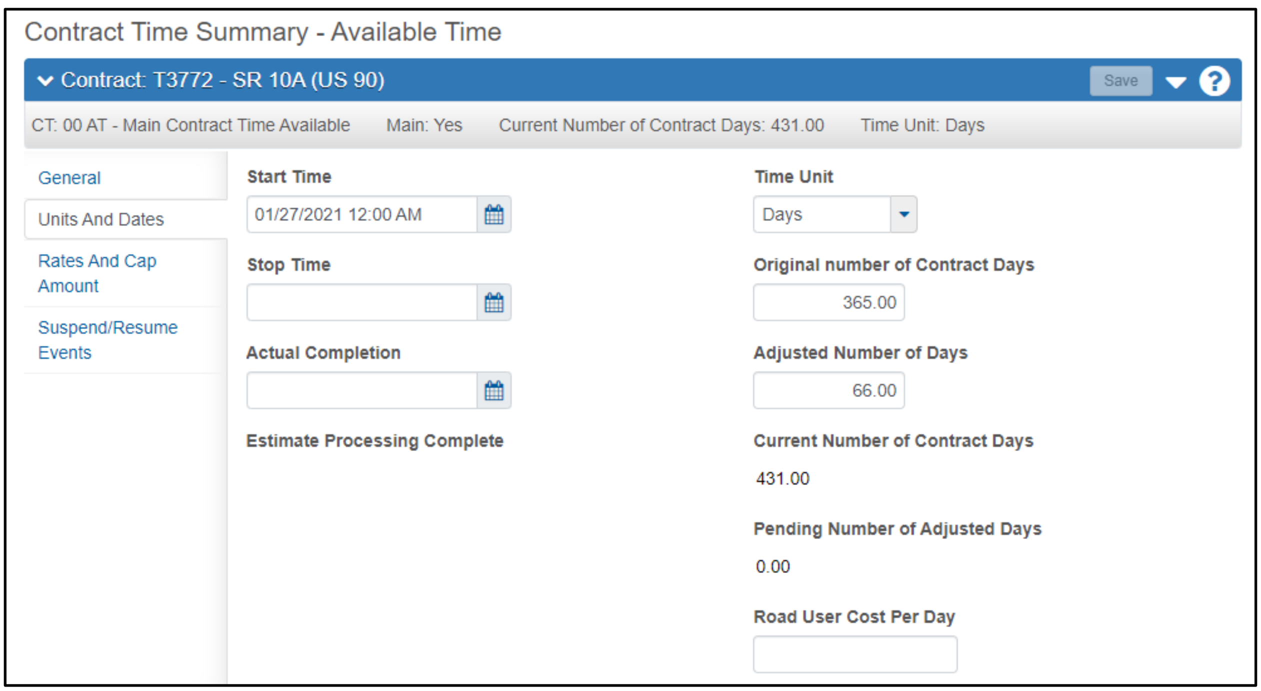


Figure 48. Site Times Units and Dates Information

Instructions 49

Navigation: Construction > Contract Administration Summary > Contract Times tab > Site Times section > Units and Dates tab

To add unit and date information to a site time record:

1. Click the **Units and Dates** tab.
2. In the **Start Time** field, enter the start date and time when the site time record begins. **(Today's date, 8:00 AM)**
3. In the **Stop Time** field, view the date and time when the time record ends.
4. In the **Actual Completion** field, view the date that the time record is completed.
5. The **Estimated Processing Complete** field shows the date when all automated processing, including estimates, was completed for the time record.
6. In the **Time Units** field, view the unit of days or hours for the time record.
7. In the **Original Number of Time Units** field, view the number of time units required for the contractor to complete the work on this time record.
8. In the **Adjusted Number of Time Units** field, view the adjusted number of time units required for the contractor to complete the work on this time record.
9. The **Current Number of Time Units** field shows the original number of time units plus any adjustments for the time record.
10. The **Pending Change Order Number of Time Units** field shows the number of time unit required to complete the time record, pending approval of associated change orders.
11. In the **Road User Cost Per Time Period** field, for the Main Contract Time record, view the dollar value assigned for a contract that was bid on a cost plus time basis.
12. Click the **Save** button.

Adding Site Time Rates and Cap Amounts

Note: The Liquidated Damages/Disincentive Rate is set to $1.00 by default. Prior to contract activation, you should check the contract and determine the correct amount to enter in this field.

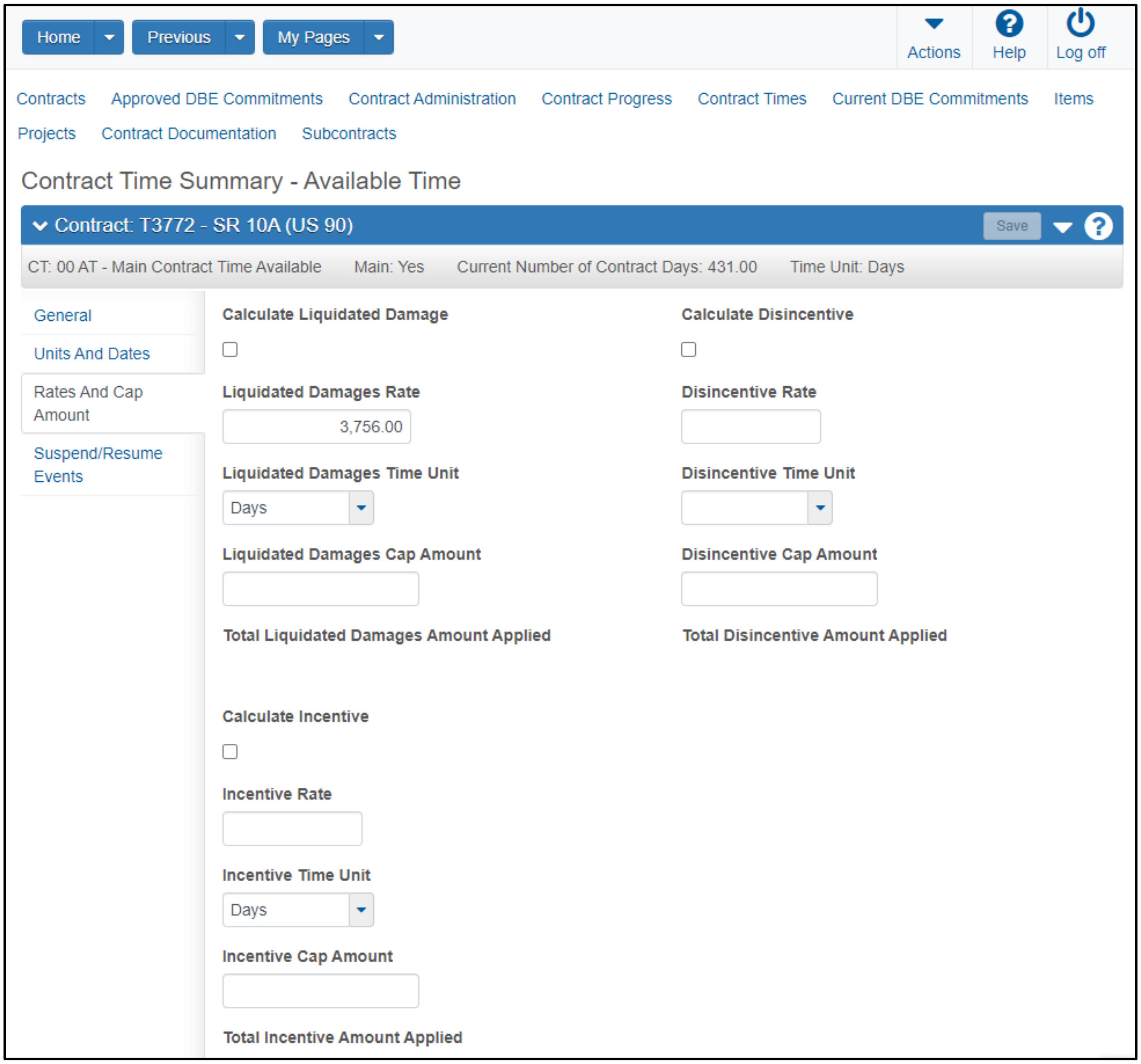


Figure 49. Site Time Rates and Cap Amounts Information

Instructions 50

Navigation: Construction > Contract Administration Summary > Contract Times tab > Site Times section > Rates and Cap Amounts tab

To add rate and cap information to a site time record:

1. Click the **Rates and Cap Amounts** tab.
2. Click the **Calculate Liquidated Damage** or **Calculate Disincentive** check box to allow the system to automatically calculate the liquidated damages or disincentives to be paid during the estimate process. **(Select the Calculate Liquidated Damage check box)**
3. In the **Liquidated Damages Rate** or **Disincentive Rate** field, enter the amount to be charged for each time unit that the contractor exceeds the allowed time for a contract time record. **(Liquidated Damages Rate = 6143)**

   If the Liquidated Damages/Disincentive Rate is more than $20,000,000, round the value to the nearest dollar.
4. In the **Liquidated Damages Time Unit** or **Disincentive Time Unit** field, click the drop-down arrow and select the unit of days or hours used for liquidated damages or disincentives on the time record. **(Liquidated Damages Time Unit = Days)**
5. In the **Liquidated Damages Cap Amount** or **Disincentive Cap Amount** field, enter the maximum liquidated damages or disincentive amount that can be withheld from the contractor for this time record.
6. The **Total Liquidated Damages Amount Applied** and **Total Disincentive Amount Applied** fields list the total liquidated damages or disincentive amounts that have been charged to the contractor for this time record.
7. Click the **Calculate Incentive** check box to allow the system to automatically calculate the incentives to be paid during the estimate process. **(Leave unchecked)**
8. In the **Incentive Rate** field, enter the amount to be paid to the contractor for each time unit that the contractor completes the contract time work in advance of the scheduled completion.
9. In the **Incentive Time Unit** field, click the drop-down arrow and select the unit of days or hours used for the incentive.
10. In the **Incentive Cap Amount** field, enter the maximum incentive amount that can be paid to the contractor for this time record.
11. The **Total Incentive Amount Applied** field lists the total incentive amounts that have been paid to the contractor for work completed in advance of the scheduled completion for this time record.
12. Click the **Save** button.

Adding Site Time Suspend/Resume Events

You can suspend and resume contract time for site times with available time charges.

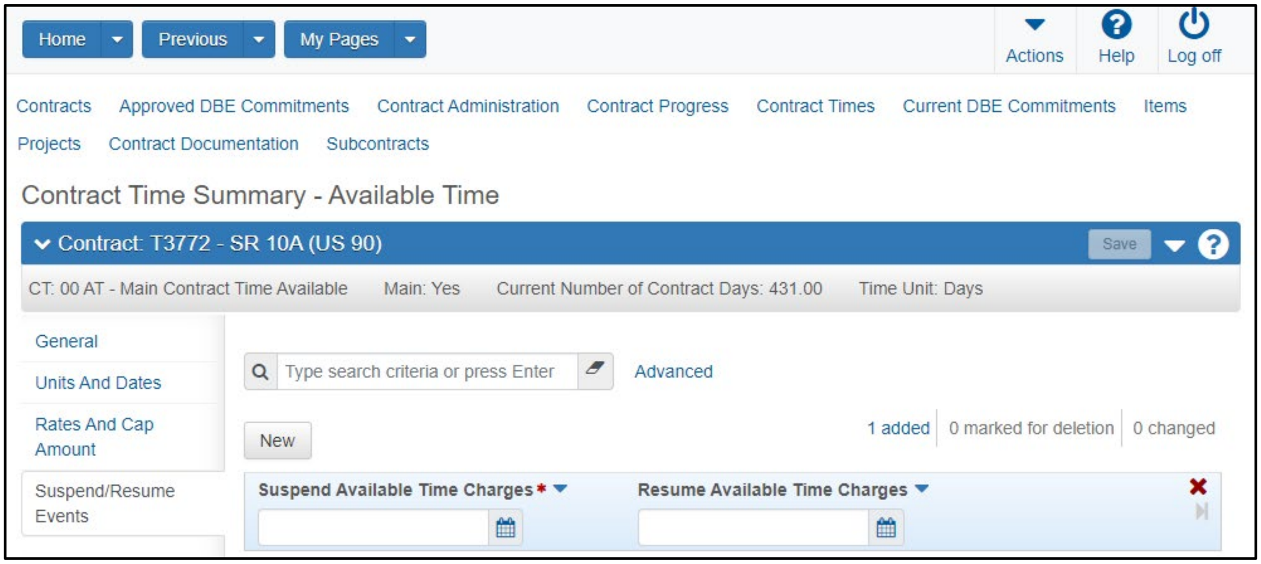


Figure 50. Site Time Suspend/Resume Events Information

Instructions 51 – Outside of Training Only

Note: Outside of training, use the following instructions to suspend and resume contract time for site times with available time charges.

Navigation: Construction > Contract Administration Summary > Contract Times tab > Site Times section > Suspend/Resume Events tab

To suspend and resume time on a site time record:

1. Click the **Suspend/Resume Events** tab.
2. Click the **New** button.
3. In the **Suspend Available Time Charges** field, enter the date on which to start suspending time.
4. In the **Resume Available Time Charges** field, enter the date on which to resume time.
5. Click the **Save** button.

Adding Informational Times

You can record information about contract dates at the time of occurrence.

- *Prior to activating the contract*, district personnel will verify that the needed dates have been recorded. These dates include the Awarded Date, Execution Date, and Letting Date.
- *After activating the contract*, district personnel will continue to update contract time records as applicable throughout the life of the contract. These dates include the Notice to Proceed Date, Price Adjustments Base Date (Not required on all contracts; determined by the applicable Specs package), Time Began Date, Work Began Date, etc.

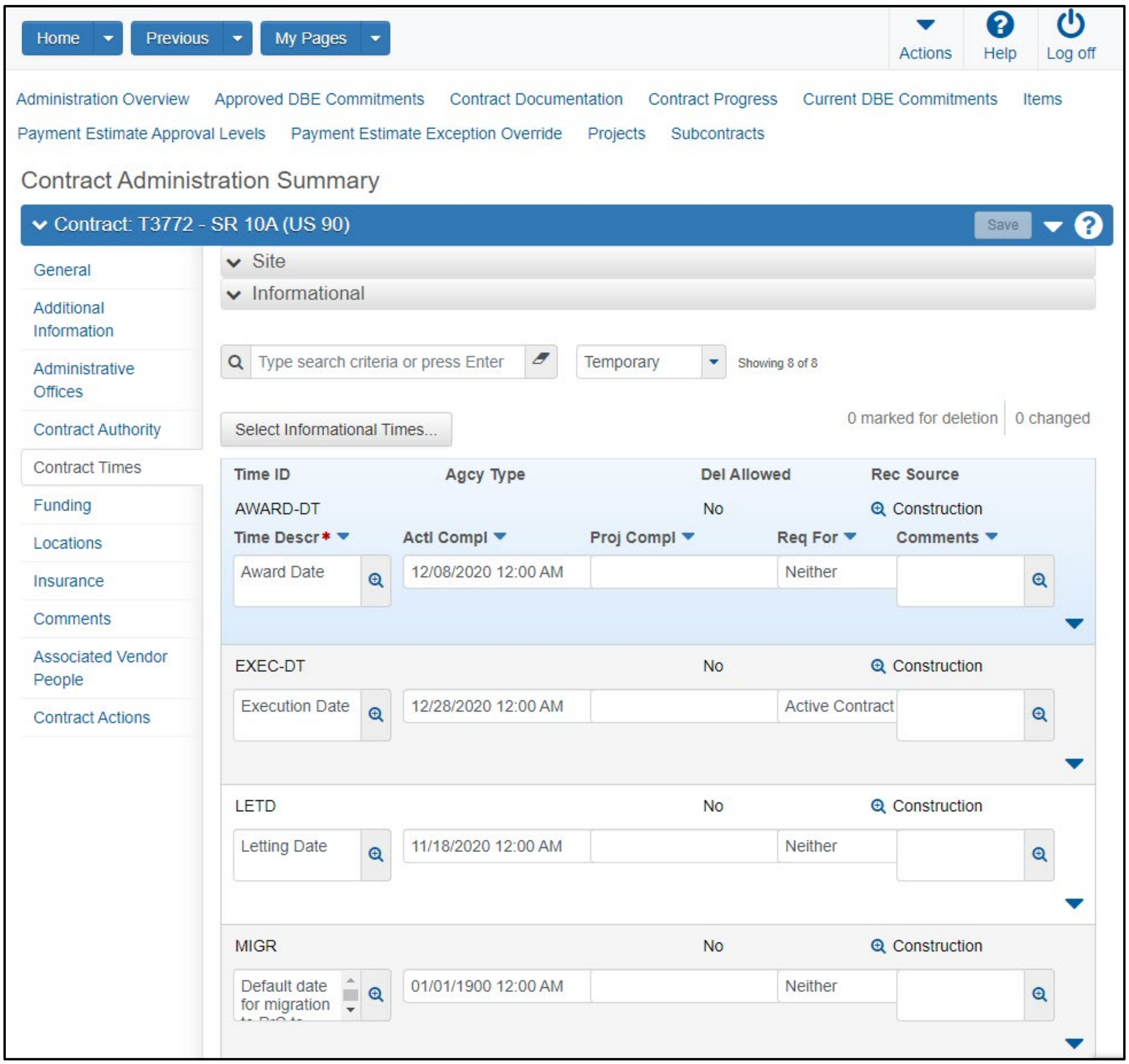


Figure 51. Contract Times - Informational

Instructions 52 – Training Only

Note: In this training example, you will record all of the contract informational times needed for training. (Outside of training, you will record applicable information about contract times at the time of occurrence.)

Navigation: Construction > Contract Administration Summary > Contract Times tab > Informational Times section

To add informational time records to the contract:

1. Click the **Contract Administration** quick link.
2. If needed, click the **Contract Times** tab.
3. In the **Informational** section, verify the following information has been recorded in the **Actl Compl** fields:

   AWARD-DT Awarded Date: Actl Compl populated
   EXEC-DT Execution Date: Actl Compl populated
   LETD Letting Date: Actl Compl populated

4. In the **Informational** section, enter the following information in the **Actual Completion** fields:

   NTP-DT Notice to Proceed Date: Today's Date
   PAJB Price Adjustments Base Date: Today's Date
   TMBG Time Began Date: Today's Date
   WKBGN-DT Work Began Date: Today's Date

5. Click the **Save** button.

Instructions 53 – Outside of Training Only

Note: Outside of training, use the following instructions to record information about contract times as applicable.

Navigation: Construction > Contract Administration Summary > Contract Times tab > Informational Times section

To add informational time records to the contract:

1. In the Informational section, click the **Select Informational Times…** button.
2. Search for and select the informational time(s) to add.
3. Click the **Add to Contract Times** button.
4. In the **Time Descr** field, view the description for the contract time.
5. In the **Actl Compl** field, enter the actual date on which the contract time is complete.
6. In the **Proj Compl** field, enter the projected date on which the contract time is anticipated to be complete.
7. In the **Req For** field, click the drop-down arrow, and select whether the contract time is required to activate a contract, to complete a contract, or neither.
8. In the **Comments** field, enter additional information.
9. Click the **Save** button.

Managing Subcontracts

A subcontract is a contract between the prime contractor on an FDOT contract and a third party. The subcontract assigns part of the work in the original contract to the third party.

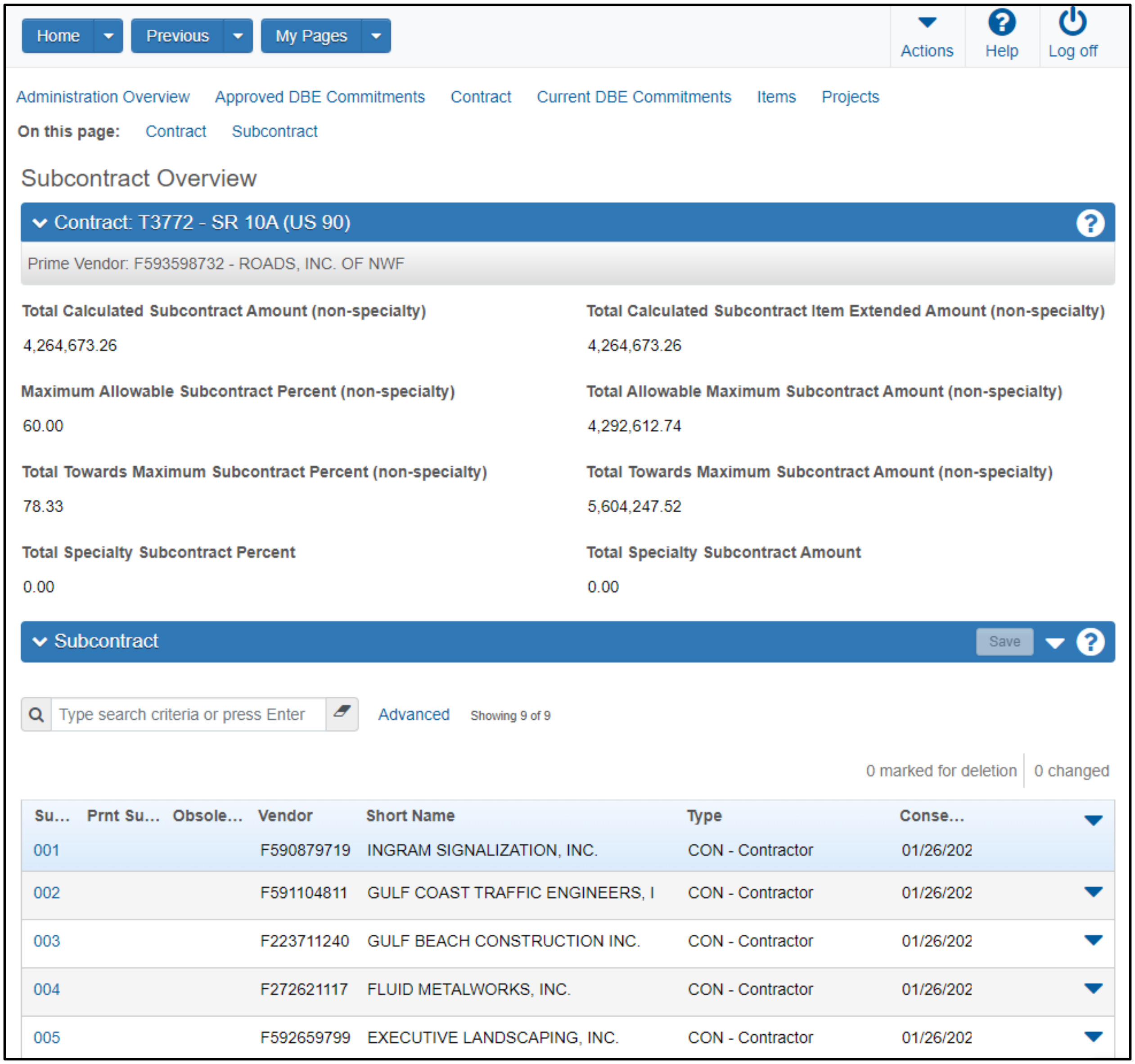


Figure 52. Subcontract Overview

Adding Subcontracts to a Contract

A subcontract also describes the contract work that the prime contractor will not perform. You can divide subcontracts into items and define subcontracted quantities. Each subcontract item can have a partial item percentage applied to it, which indicates that the subcontractor will perform only part of the item work.

> **Note**: The following roles can add subcontracts. Each district will identify which of these roles will add subcontracts within the district, based on each district's internal policies.
> - PrC District Office Engineer
> - PrC Resident Contract Support Specialist

> **Note**: Only one vendor work classification is required to save the new subcontract, but you can add multiple classifications if needed.

> **Note**: If the **Use Approved Vendor Work Classes** check box is selected, the drop-down list available when you click in the **Name** field in the Work Classifications section is filtered to include only those values from the VWRKCLS code table and RefVendorWorkClass table that are approved for this vendor.

Required fields are:

- Subcontract Number
- Vendor
- Subcontract Type
- Name (Under Work Classifications)

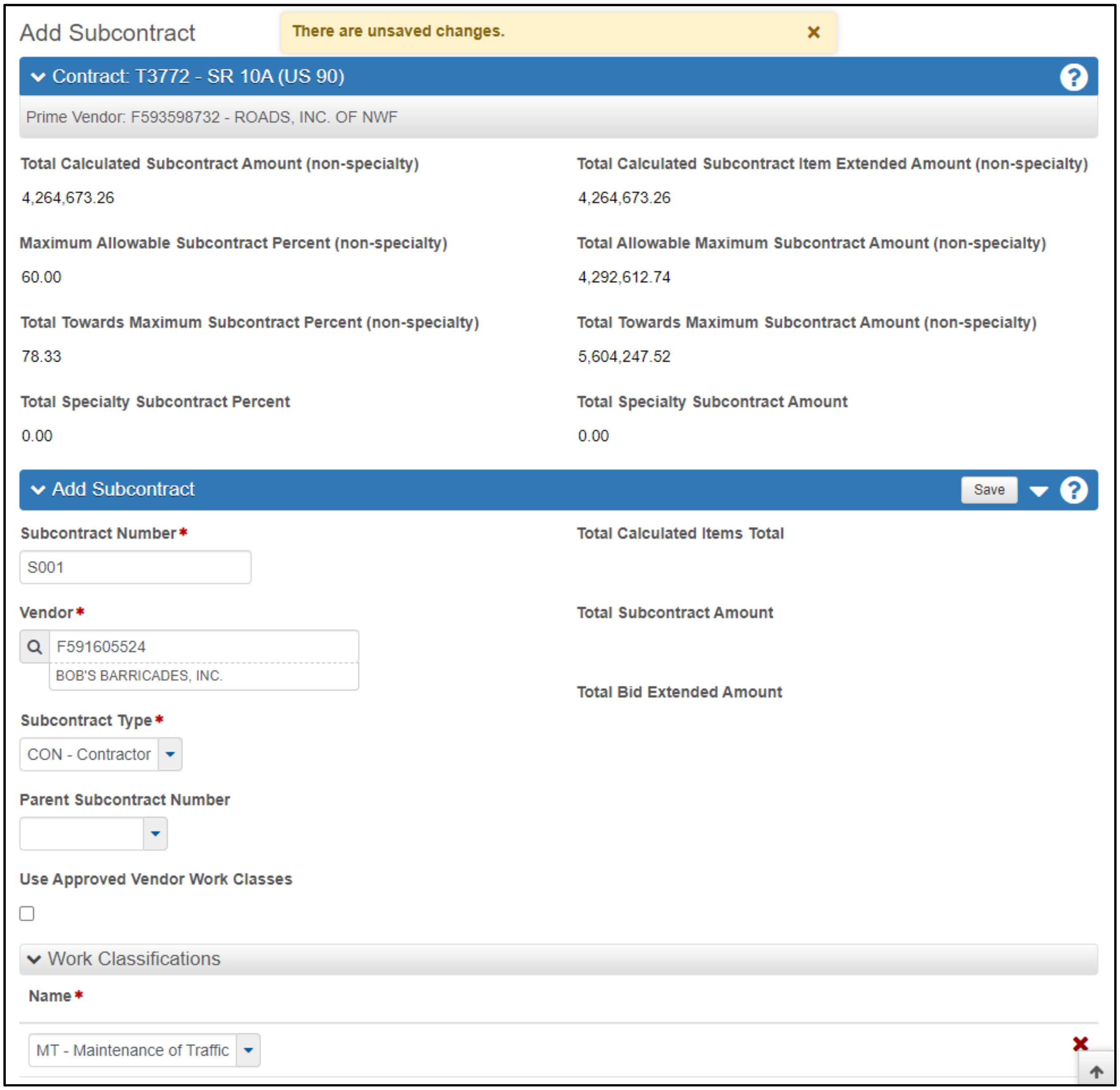


Figure 53. Add Subcontract Component

Instructions 54

Navigation: Construction > Contract Administration Summary > Subcontracts quick link

To add a Subcontract:

1. Click the **Subcontracts** quick link.
2. Click the **Home** drop-down arrow and verify the correct role is selected. (**PrCRCSS** or **PrCDistOffEng**)
3. On the **Subcontract** component, click the component **Actions** button.
4. Click the **Add** action.
5. In the **Subcontract Number** field, enter the identification number for the subcontract. **(S001)**

   The Subcontract Number indicates the tier of the subcontractor. S### is a first-tier subcontractor, whereas SS### would be a second-tier subcontractor, and so on.
6. In the **Vendor** field, enter the vendor selected to work on the contract. **(F591605524 – BOB'S BARRICADES, INC.)**
7. In the **Subcontract Type** field, click the drop-down arrow and select the subcontract type. **(CON – Contractor)**
8. If this is a tier 2 or lower subcontract, in the **Parent Subcontract Number** field, click the drop-down arrow and select the parent subcontract from the drop-down list.
9. Click the **Use Approved Vendor Work Classes** check box if the subcontract work class assigned must be an approved work class code. **(Clear this check box)**
10. In the **Work Classification** field, click the drop-down arrow and select the work classification for the subcontract. **(MT – Maintenance of Traffic)**
11. Click the **Exclude Tier 1 Subcontract With Items From Threshold Calcs** check box if the items on this subcontract will be excluded from the percentage threshold calculation. **(Leave unchecked)**
12. In the **Date Sublet Received** field, enter the date the subcontract was received by the agency. **(Today's Date)**
13. In the **Date Sublet Approved** field, enter the date the subcontract was approved by the agency. **(Today's Date)**

    Once the record is saved, this field will become the Approval Date field.
14. Click the **Trucker** check box if this subcontractor provides trucking services for the contract. **(Leave unchecked)**
15. Click the **Supplier** check box if this vendor is a supplier for the contract. **(Leave unchecked)**

16. Click the **Broker** check box if this vendor only facilitates the sale or shipment of materials or equipment, without any direct employees or equipment. **(Leave unchecked)**
17. In the **Comments** field, enter any additional information about the subcontract.
18. Click the **Save** button.

    The calculated amounts will not be populated until the record is saved.
19. The **Total Calculated Items Total** field displays the sum of the subcontract items prime's extended amounts in this subcontract.
20. The **Total Subcontract Amount** field displays the sum of the subcontract items prime's extended amounts for this subcontract plus the subcontract's supplier amount, trucker amount and broker amount.
21. The **Total Sub Extended Amount** field displays the sum of the subcontract items' sub extended amounts for this subcontract.
22. In the **Inactive Date** field, enter a date if the record is no longer active. **(Leave blank)**

Adding Items to the Subcontract

The Items tab of the Subcontract Summary component contains all of the item information for the selected subcontract.

Required fields are:

- Quantity
- Sublet Unit Price
- Unit of Measure

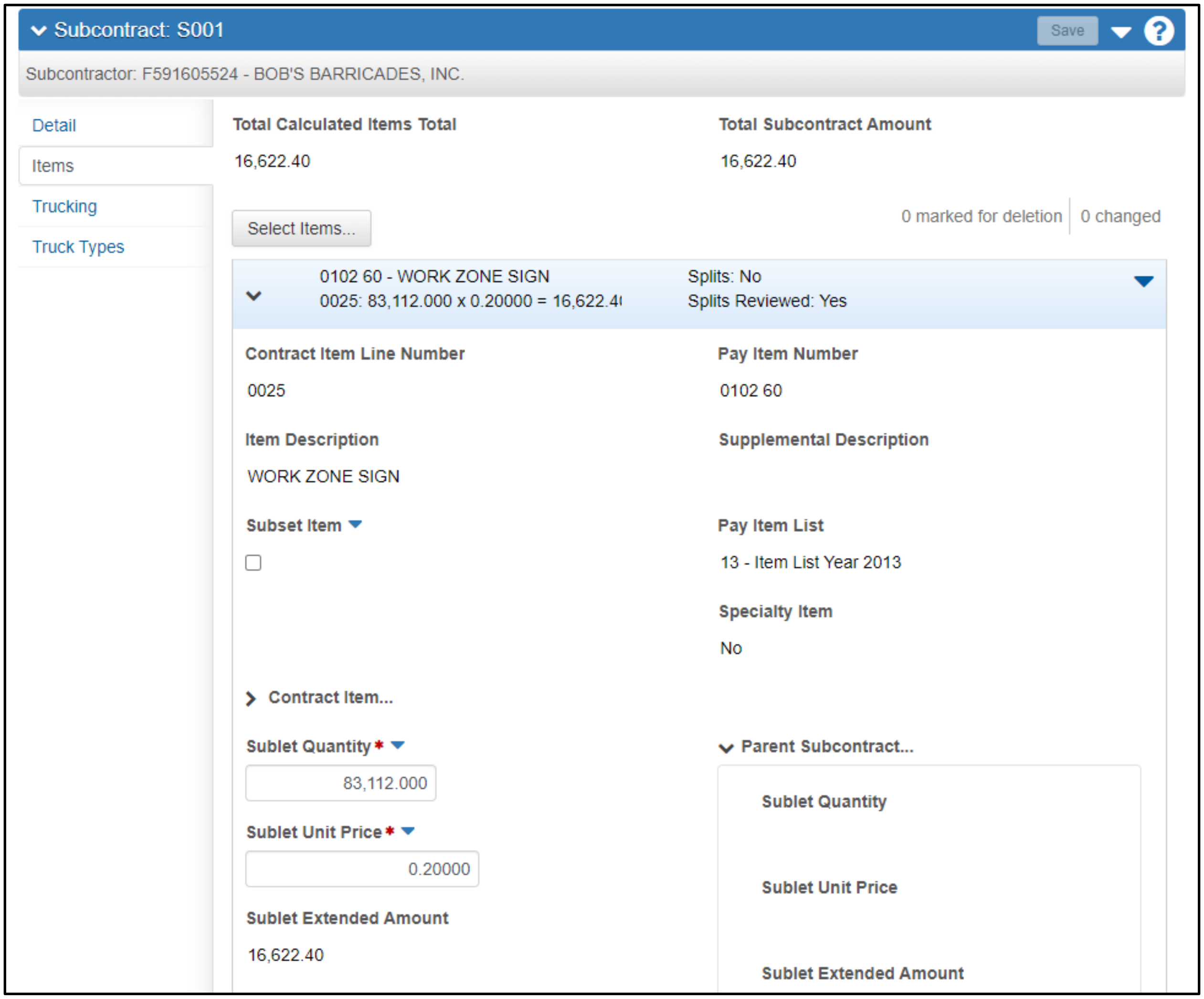


Figure 54. Subcontract Items Information

Instructions 55

Navigation: Contract Administration Summary > Subcontracts quick link > Items tab

To add items to a subcontract:

1. Click the **Items** tab.
2. Click the **Select Items** button.
3. Search for and select the items to add to the subcontract. **(WORK ZONE SIGN)**
4. Click the **Add to Subcontract** button.
5. Expand the row to enter information for the new subcontract item.
6. The **Contract Item Line Number** field displays the sequential identification number for the item on the contract.
7. The **Item Description** number shows the item description.
8. Click the **Subset Item** check box if the quantity of this item in the subcontract may exceed the quantity in the parent subcontract.
9. The **Pay Item Number** field lists the item code number.
10. The **Supplemental Description** field lists any supplemental description for the item.
11. The **Pay Item List** field lists the spec book for the item.
12. The **Specialty Item** field indicates whether this is a specialty item, and should not be included in subcontract threshold calculations.
13. The **Contract Item…** section lists bid and current contract quantity and price information for the item on the contract. **(Will populate after save)**
14. In the **Sublet Quantity** field, enter the number of units of the item to be included on this subcontract. **(Leave as-is)**
15. In the **Sublet Unit Price** field, enter the unit price for the item to be paid to the subcontractor by the prime contractor. **(0.20000)**
16. The **Sublet Extended Amount** field is calculated based on the quantity and subcontract unit price for the subcontract item.
17. The **Unit of Measure** field shows the unit for the item. **(Default: ED – EACH DAY)**
18. In the **Bid Unit Price** field, enter the unit price for the item as bid by the prime contractor. **(Leave as-is)**

19. The **Bid Extended Amount** field is calculated based on the quantity and prime unit price for the subcontract item.

20. In the **Comments** field, enter any additional information.

21. The **Parent Subcontract** section displays quantity, prime unit price and extended amount, and subcontract unit price and extended amount for the parent subcontractor.

22. The **Project Item Splits** field indicates whether this item has been divided across projects or by funding.

23. The **Project Item Splits Reviewed** field indicates whether the agency has reviewed the adjusted subcontract item splits as necessary.

    Splits occur when the same pay item is on more than one project on the contract but could have different quantities on each project.

24. The **Record Source** field identifies where the record was created.

25. Click the **Dbe Certified Work Item** check box if the subcontract item is work the subcontractor is certified to do as a DBE certified vendor.

26. Click the **Save** button.

Instructions 56

Navigation: Contract Administration Summary > Subcontracts quick link > Items tab

To review the project item splits:

1. Click the row **Actions** button on the appropriate item and select the **Open Subcontract Project Items** action. **(WORK ZONE SIGN)**

2. Scroll down to the **Subcontract Project Item Overview** section for the item. **(WORK ZONE SIGN)**

3. Click the component **Actions** button and select the **Mark Project Items As Reviewed** action.

4. Click the **Subcontract Contract Items** quick link at top of window.

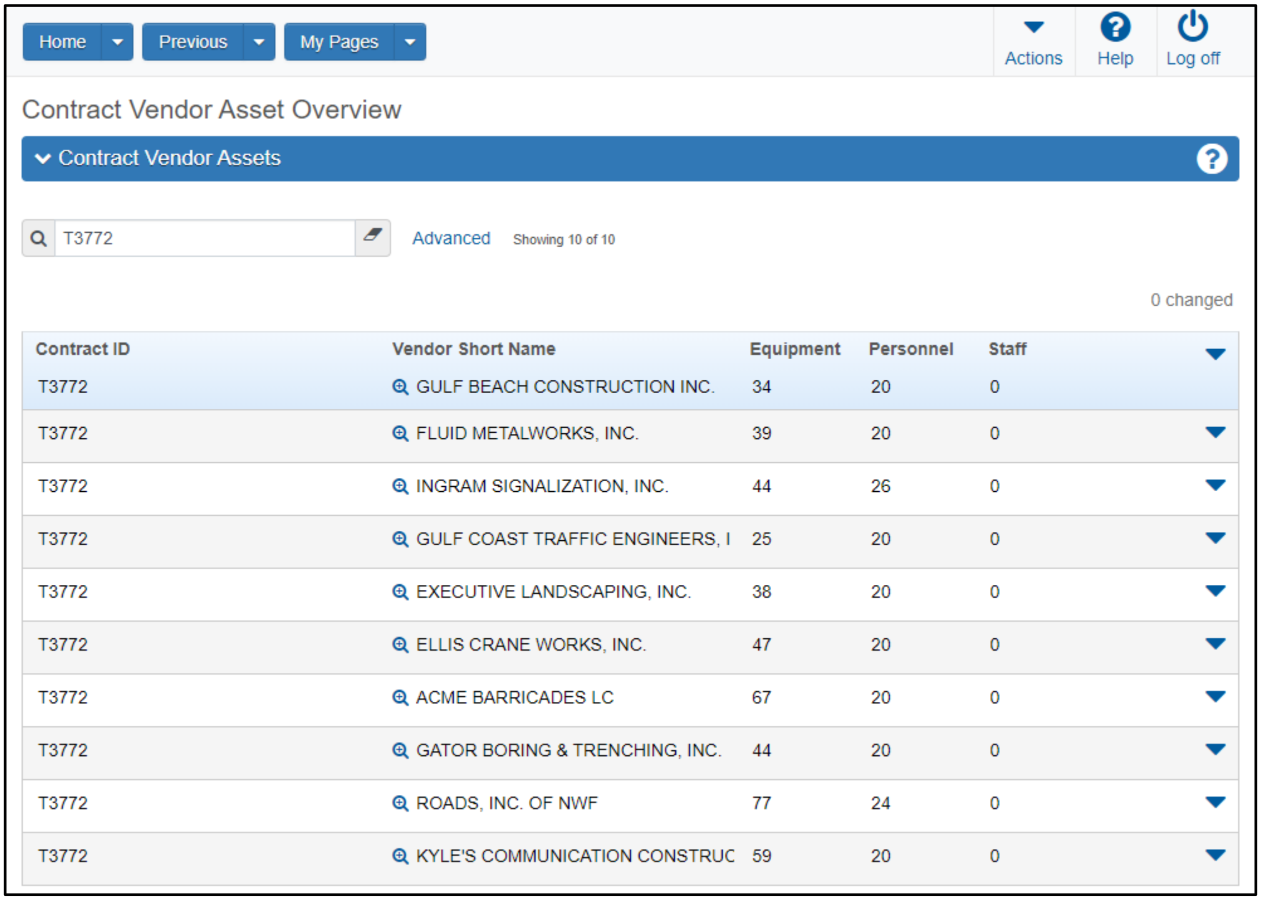
   Note that the Project Item Splits Reviewed field now says Yes.

5. Click the **Home** button.

Managing Contract Vendor Assets

The Contract Vendor Asset Summary contains all the vendor assets currently recorded for the prime contractor on a contract. Contract vendor assets are the prime contractor's equipment, personnel, and staff used in performing the contract work.

Note: To select Contract Vendor Assets, the assets must have been previously added on the Vendor Asset Summary component.



Contract ID	Vendor Short Name	Equipment	Personnel	Staff
T3772	GULF BEACH CONSTRUCTION INC.	34	20	0
T3772	FLUID METALWORKS, INC.	39	20	0
T3772	INGRAM SIGNALIZATION, INC.	44	26	0
T3772	GULF COAST TRAFFIC ENGINEERS, I	25	20	0
T3772	EXECUTIVE LANDSCAPING, INC.	38	20	0
T3772	ELLIS CRANE WORKS, INC.	47	20	0
T3772	ACME BARRICADES LC	67	20	0
T3772	GATOR BORING & TRENCHING, INC.	44	20	0
T3772	ROADS, INC. OF NWF	77	24	0
T3772	KYLE'S COMMUNICATION CONSTRUC	59	20	0

Figure 55. Contract Vendor Asset Summary Component

Maintaining Contract Vendor Equipment

Required fields are:

- Equipment Description

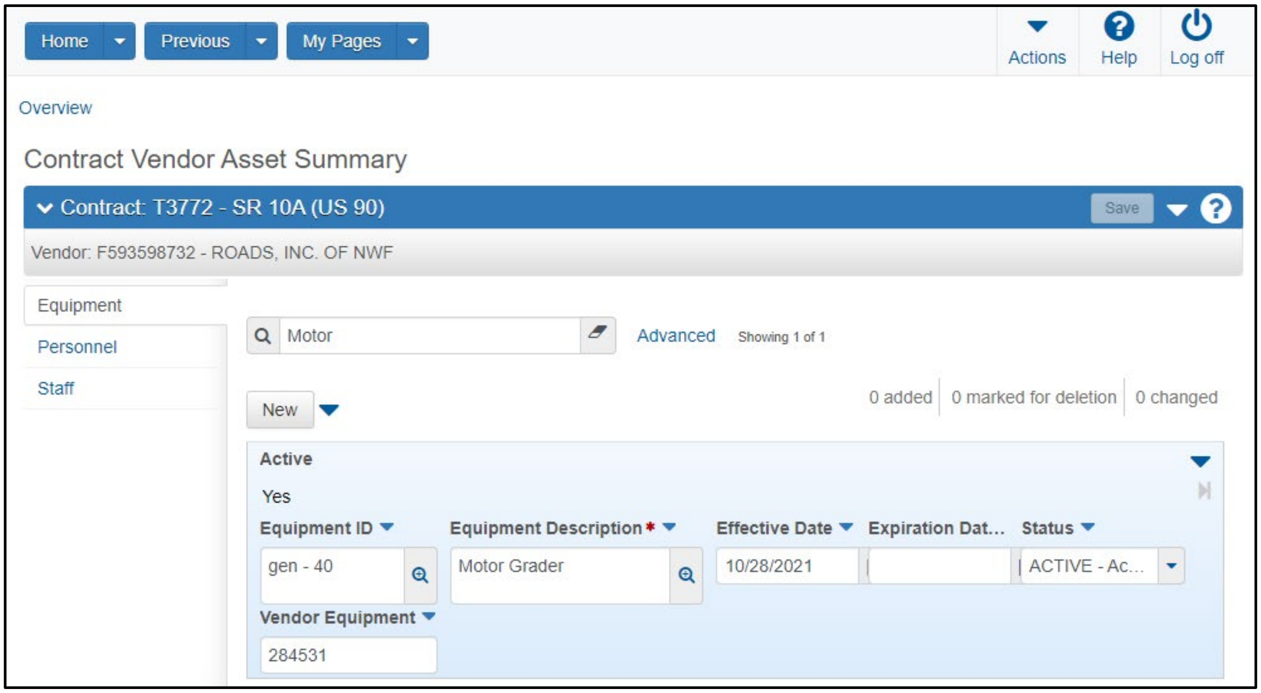


Figure 56. Contract Vendor Asset Summary – Equipment Tab

Instructions 57

Navigation: Construction > Contract Vendor Assets > Equipment tab

To add Contract Vendor Equipment:

1. Click the **Home** button.
2. Click the **Home** drop-down arrow and verify the correct role is selected. (**PrCCenOffAdmin**)
3. From the **Construction** component, click the **Contract Vendor Assets** link.
4. In the **Quick Find** search box, search for your contract and vendor. **(TRNXX**, where XX is your assigned contract number; **Prime: ROADS, INC OF NWF)**
5. Click the row **Actions** button, and select the **Open Equipment** action.
6. Click the **New** button.
7. In the **Equipment ID** field, enter the identification name or number for the piece of equipment used by the vendor on the contract. **(TRNXX - gen – 40**, where XX is your assigned number**)**
8. In the **Equipment Description** field, enter a description or type of equipment used by the vendor on the contract. **(Motor Grader)**

9. In the **Effective Date** field, enter the date the piece of equipment becomes effective. **(Today's Date)**
10. In the **Expiration Date** field, enter the expiration date for the piece of equipment on the contract.

    In general, FDOT recommends waiting to enter the Expiration Date until the date occurs.
11. In the **Status** field, click the drop-down arrow and select the status of the record. **(ACTIVE)**
12. Click the **Save** button.

Instructions 58

Navigation: Construction > Contract Vendor Assets > Equipment tab

To select Contract Vendor Equipment:

1. From the **Contract Vendor Asset Summary**, click the list **Actions** button and click **Select Vendor Equipment**.
2. Search for and select the equipment records. **(Air Compressor, Asphalt Paver, and Concrete Grinder)**
3. In the **Effective Date** field, enter the date the selected equipment becomes effective. **(Today's Date)**
4. In the **Expiration Date** field, enter the expiration date for the selected equipment on the contract.

   In general, FDOT recommends waiting to enter the Expiration Date until the date occurs.
5. In the **Status** field, click the drop-down arrow and select the status of the selected equipment records. **(ACTIVE)**
6. Click the **Add to Contract Vendor** button.
7. Click the **Save** button.

Maintaining Contract Vendor Personnel

Required fields are:

- Personnel Description

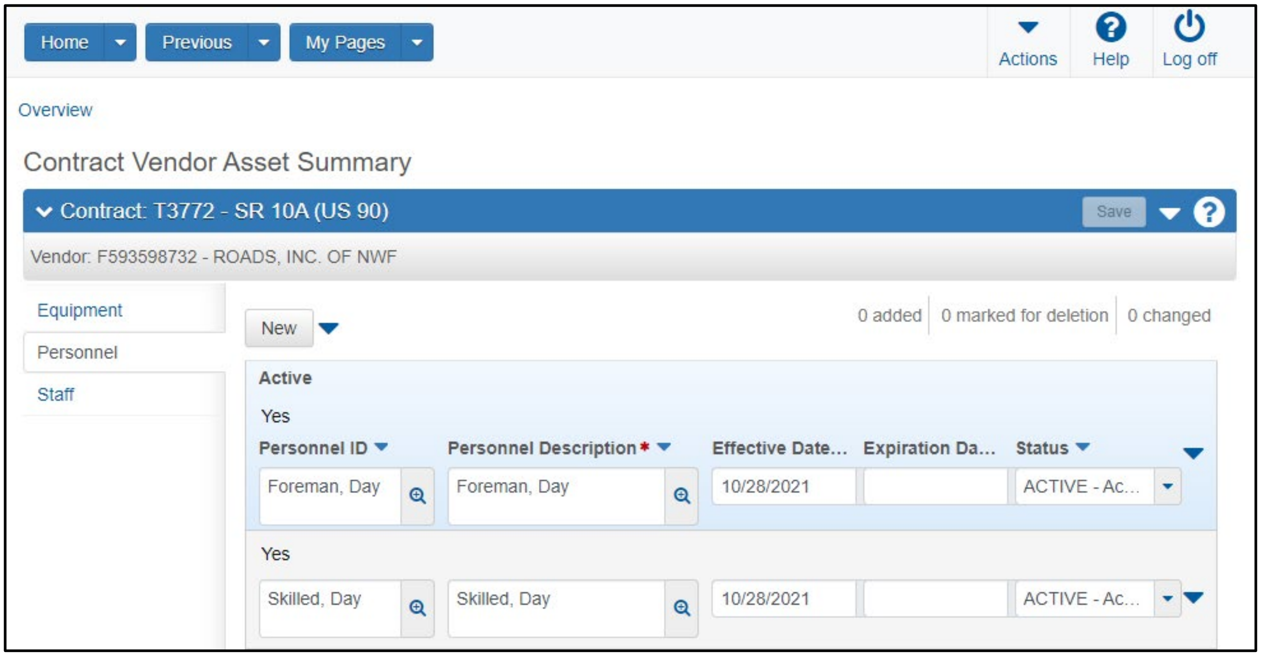


Figure 57. Contract Vendor Asset Summary – Personnel Tab

Instructions 59

Navigation: Construction > Contract Vendor Assets > Personnel tab

To add Contract Vendor Personnel:

1. Click the **Personnel** tab.
2. In the **Personnel ID** field, enter the identification name or number for the personnel used by the vendor on the contract. **(TRNXX - Skilled, Day**, where XX is your assigned number**)**
3. In the **Personnel Description** field, enter a description of the personnel used by the vendor on the contract. **(Skilled, Day)**
4. In the **Effective Date** field, enter the date the personnel record becomes effective. **(Today's Date)**
5. In the **Expiration Date** field, enter the expiration date for the personnel record.

   In general, FDOT recommends waiting to enter the Expiration Date until the date occurs.

6. In the **Status** field, click the drop-down arrow and select the status of the record. **(ACTIVE)**
7. Click the **Save** button.

Instructions 60

Navigation: Construction > Contract Vendor Assets > Personnel tab

To select Contract Vendor Personnel:

1. Click the **Personnel** tab.
2. Click the list **Actions** button and click **Select Vendor Personnel**.
3. Search for and select the personnel records. **(Common, Day;** and **Semi Skilled, Day)**
4. In the **Effective Date** field, enter the date the selected personnel become effective. **(Today's Date)**
5. In the **Expiration Date** field, enter the expiration date for the selected personnel on the contract. **(Leave blank)**

   In general, FDOT recommends waiting to enter the Expiration Date until the date occurs.

6. In the **Status** field, click the drop-down arrow and select the status of the selected personnel records. **(ACTIVE)**
7. Click the **Add to Contract Vendor** button.
8. Click the **Save** button.

Maintaining Contract Vendor Staff

Required fields are:

- Staff Description

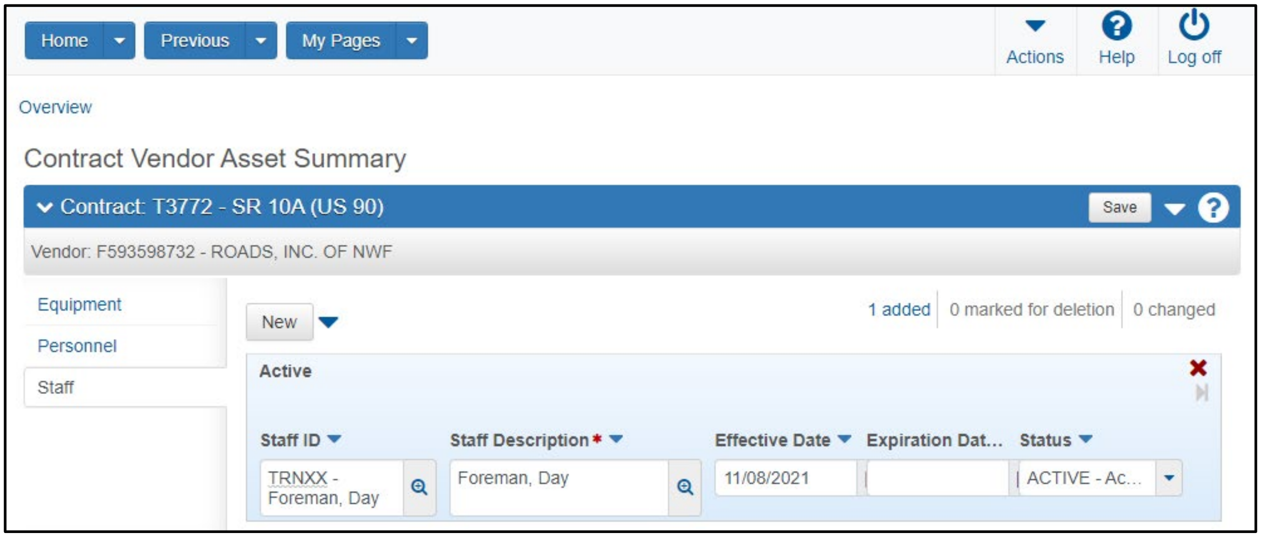


Figure 58. Contract Vendor Asset Summary – Staff Tab

Instructions 61

Navigation: Construction > Contract Vendor Assets > Staff tab

To add Contract Vendor Staff:

1. Click the **Staff** tab.
2. In the **Staff ID** field, enter the identification name or number for the staff member used by the vendor on the contract. **(TRNXX - Foreman, Day**; where XX is your assigned number**)**
3. In the **Staff Description** field, enter the description of the staff member used by the vendor on the contract. **(Foreman, Day)**
4. In the **Effective Date** field, enter the date the staff record becomes effective. **(Today's Date)**
5. In the **Expiration Date** field, enter the expiration date for the staff record.

   In general, FDOT recommends waiting to enter the Expiration Date until the date occurs.
6. In the **Status** field, click the drop-down arrow and select the status of the record. **(ACTIVE)**

7. Click the **Save** button.

Instructions 62

Navigation: Construction > Contract Vendor Assets > Staff tab

To select Contract Vendor Staff:

1. Click the **Staff** tab.
2. Click the list **Actions** button and click **Select Vendor Staff**.
3. Search for and select the staff records. **(Superintendent, Day and Superintendent, Night)**
4. In the **Effective Date** field, enter the date the selected staff become effective. **(Today's Date)**
5. In the **Expiration Date** field, enter the expiration date for the selected staff on the contract. **(No date entered)**

   In general, FDOT recommends waiting to enter the Expiration Date until the date occurs.

6. In the **Status** field, click the drop-down arrow and select the status of the selected staff records. **(ACTIVE)**
7. Click the **Add to Contract Vendor** button.
8. Click the **Save** button.
9. Click the **Home** button.

Activating a Contract

The contract activation process is simplified in web-based AASHTOWare Project. If the required fields are populated on the General tab of the Contract Administration Summary, and any associated contract times that are marked as being Required to Activate include an Actual Completion Date, the system will set the contract's status to Active when you activate the contract.

After activation, agency fields and generic fields can be changed by authorized roles, but project information in the transitioned contracts can no longer be modified.

Note: To activate a contract, you must record a **Site Time** with the **Main Contract Time** check box selected.

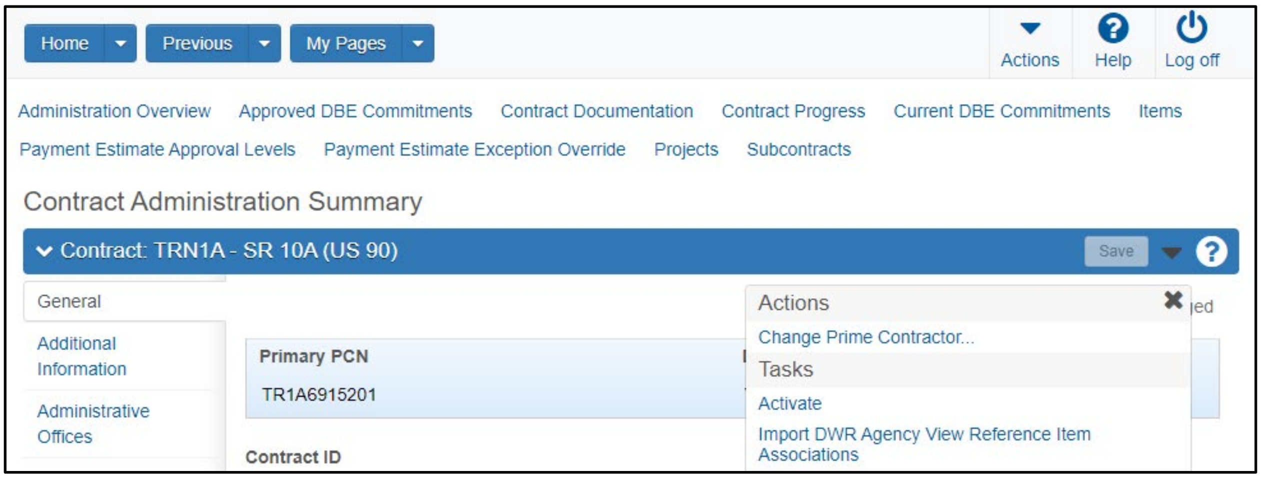


Figure 59. Activating a Contract

Instructions 63

Navigation: Construction > Contract Administration Summary > General tab

To activate a contract:

1. Click the **Home** button.
2. From the **Construction** component, select the **Contract Administration** link.
3. Search for and select the contract to activate. **(TRNXX,** where XX is your assigned contract number**)**
4. Click the **Contract ID** link.
5. Click the component **Actions** button and select **Activate**.

   The system displays a confirmation message that the contract was successfully activated and sets the Contract Status to Active.

Contract Progress

The Contract Progress Overview component enables managing all of the information related to the progress of construction work associated with a contract. Contract progress information includes payment estimates, change orders, DWRs, contract and item adjustments and more.

This chapter will review how to access and monitor information in the Contract Progress component.

More detailed information on adding and maintaining records such as Daily Work Reports, Daily Diaries, Payment Estimates, and Change Orders will be covered in subsequent chapters of this training guide.

Please note that depending on the roles you are assigned, you may not have access to all the functionality shown in this training guide.

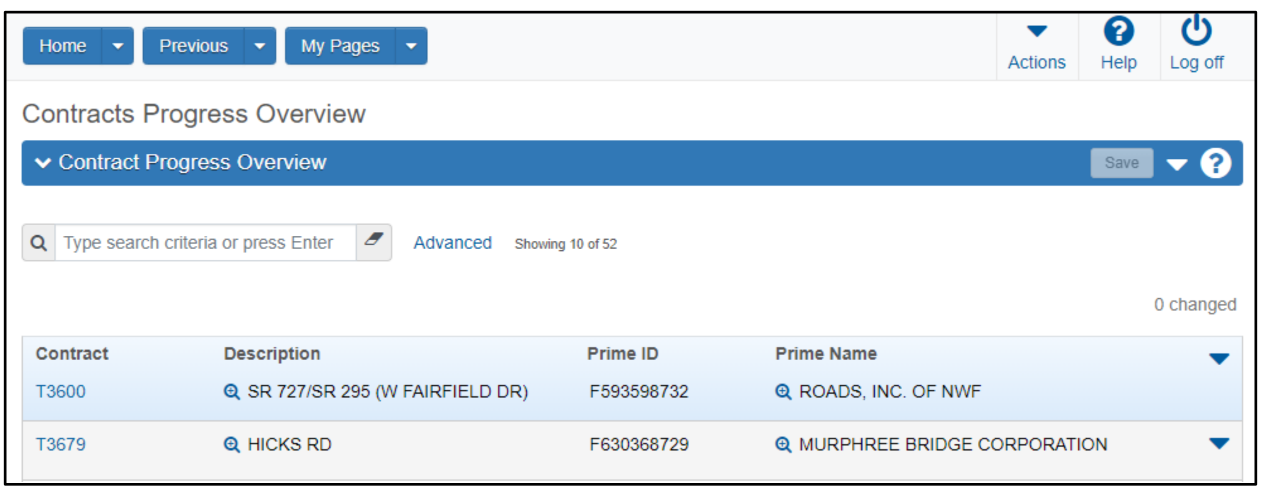


Figure 60. Contracts Progress Overview

Maintaining Contract Progress

Progress information for a contract can be accessed and maintained in the Contract Progress component.

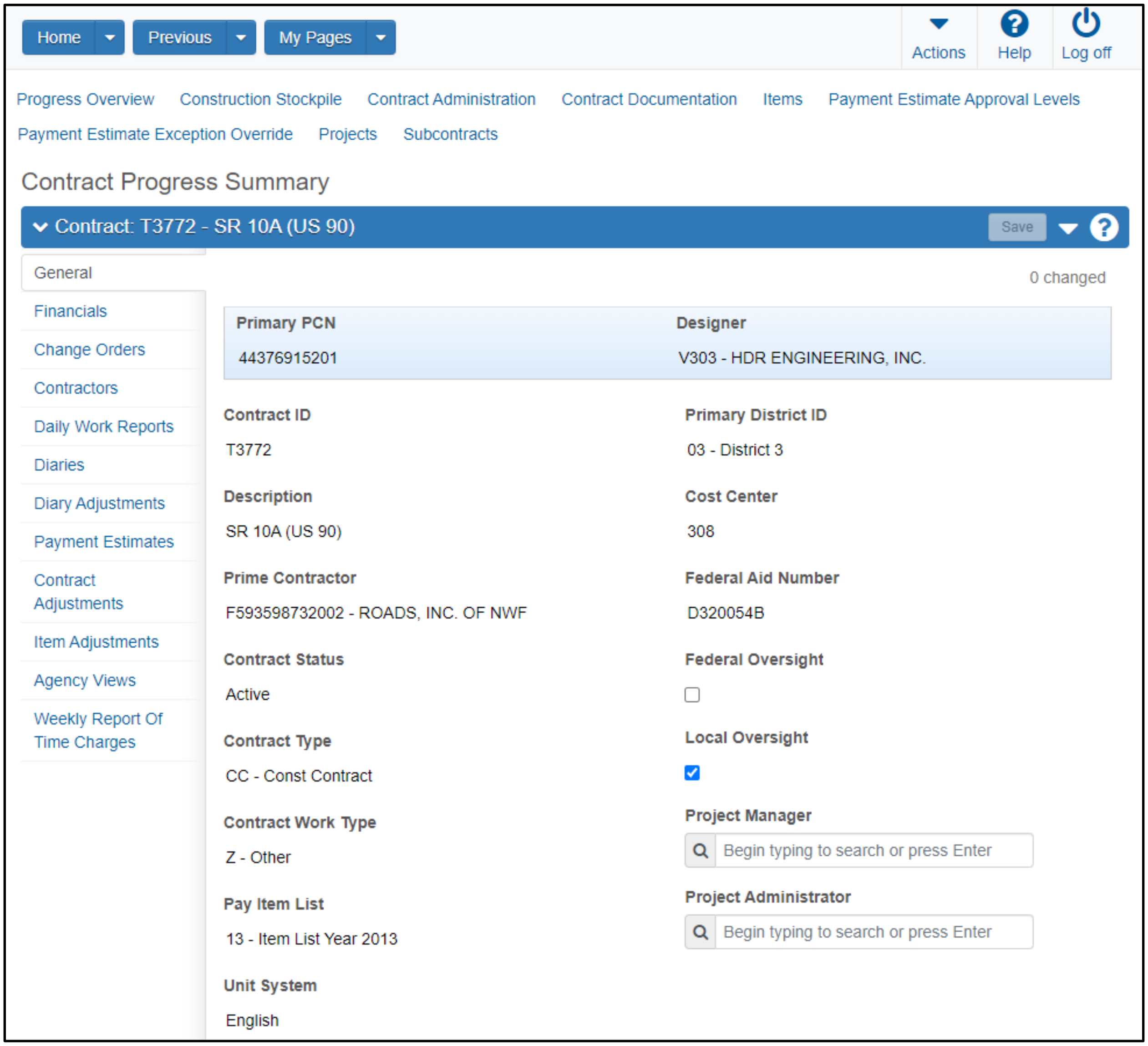


Figure 61. Contract Progress Summary – General Tab

Instructions 64

Navigation: Construction > Contract Progress

To monitor contract progress information:

1. Click the **Home** button.
2. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCDistOffAdmin)**
3. From the **Construction** component, select the **Contract Progress** link.
4. Search for and select the contract to view. **(T3772)**
5. Click the **Contract ID** link.
6. View the information.

Viewing Contract Financial Information

The Financials tab on the Contract Progress Summary component contains financial information about the contract. The information on this tab is for viewing only and cannot be changed.

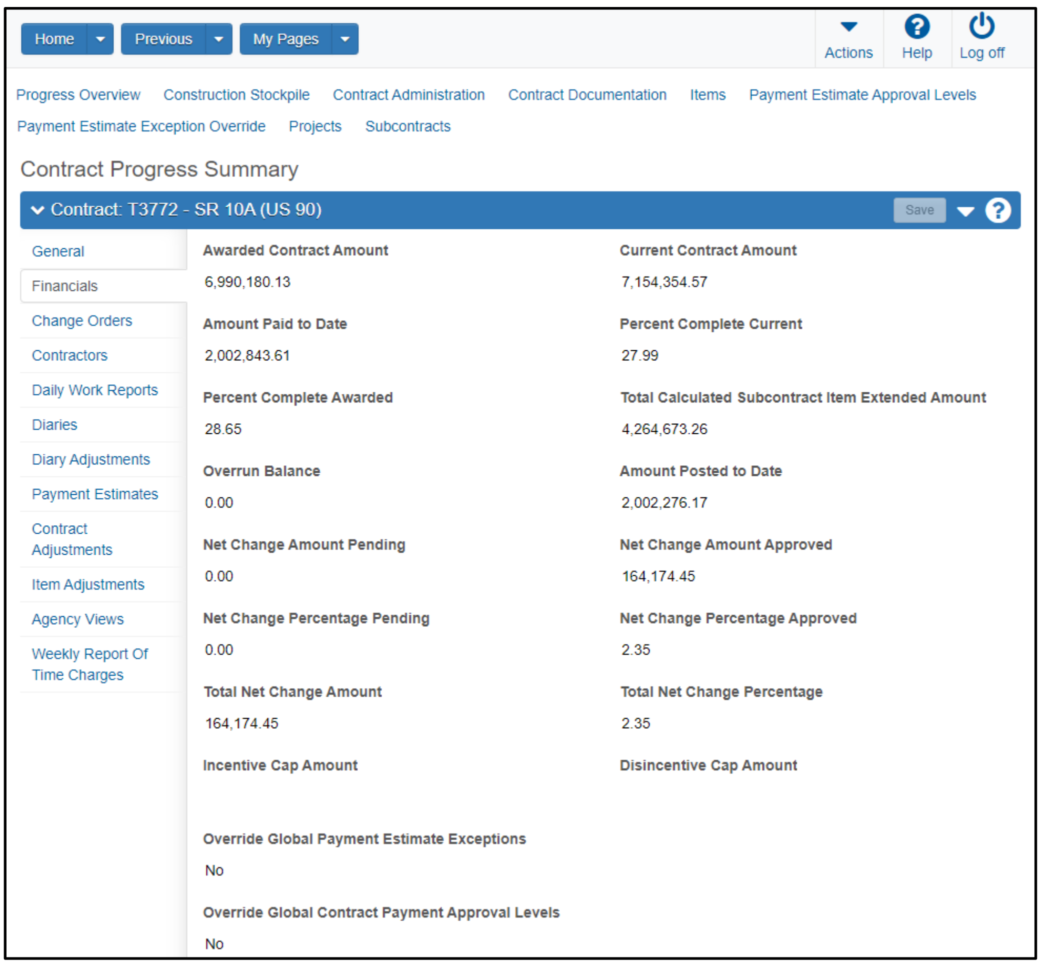


Figure 62. Contract Progress Summary – Financials Tab

Instructions 65

Navigation: Construction > Contract Progress Summary > Financials tab

To view Contract Financial Information:

1. Click the **Financials** tab.
2. View the information.

Viewing a Contract Change Order

Change orders allow you to legally change a signed contract. The Change Orders tab on the Contract Progress Summary component provides access to all the change orders that have been created for the contract.

For more detailed instructions on adding and Contract Change Orders, see the *Change Orders* section of this training guide.

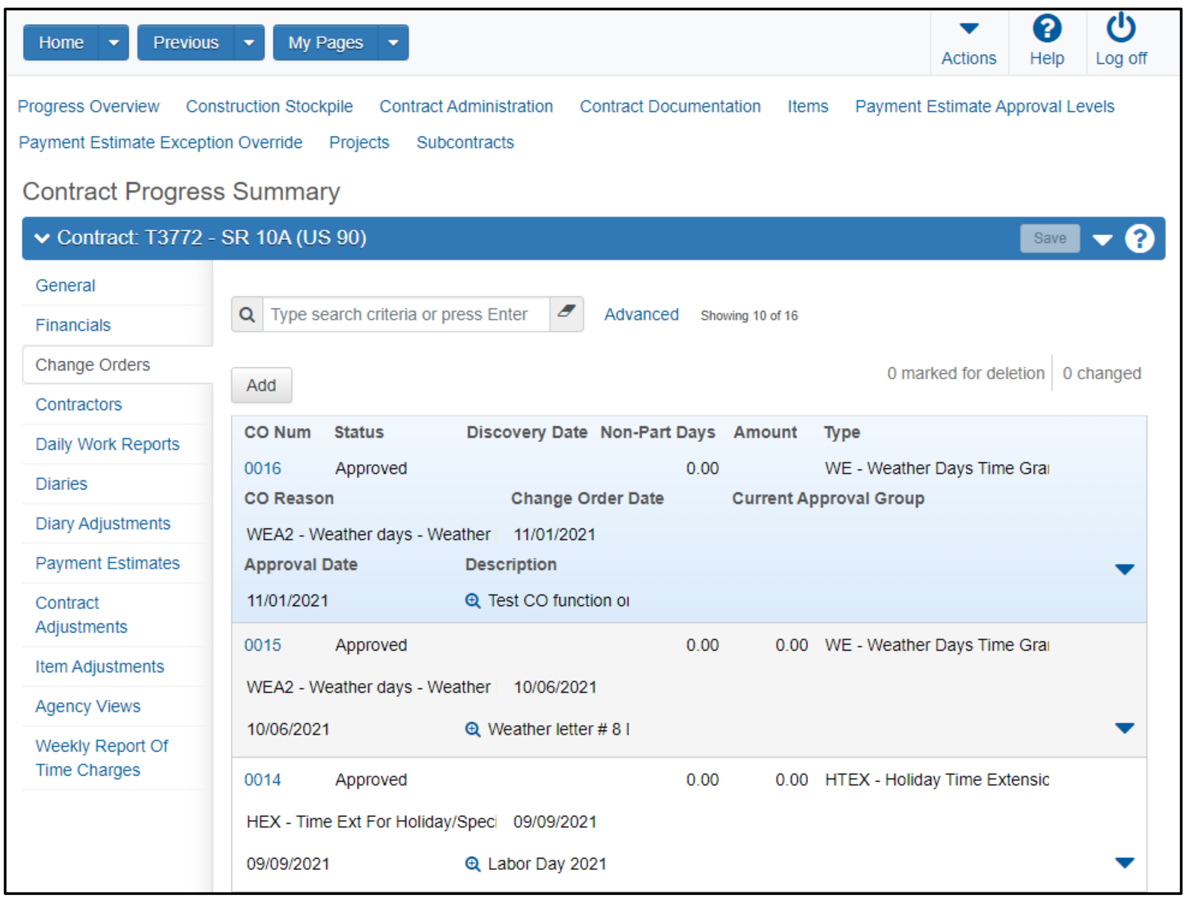


Figure 63. Contract Progress Summary – Change Orders Tab

Instructions 66

Navigation: Construction > Contract Progress Summary > Change Orders tab

To view change order information for the contract:

1. Click the **Change Orders** tab.
2. Search for and select the change orders to view. **(Any)**
3. Click the **Contract Progress** quick link.

Viewing a Contractor List

The Contractors tab of the Contract Progress Summary component contains a list of all the contractors that are currently associated with the contract. The information on this tab is for viewing only.

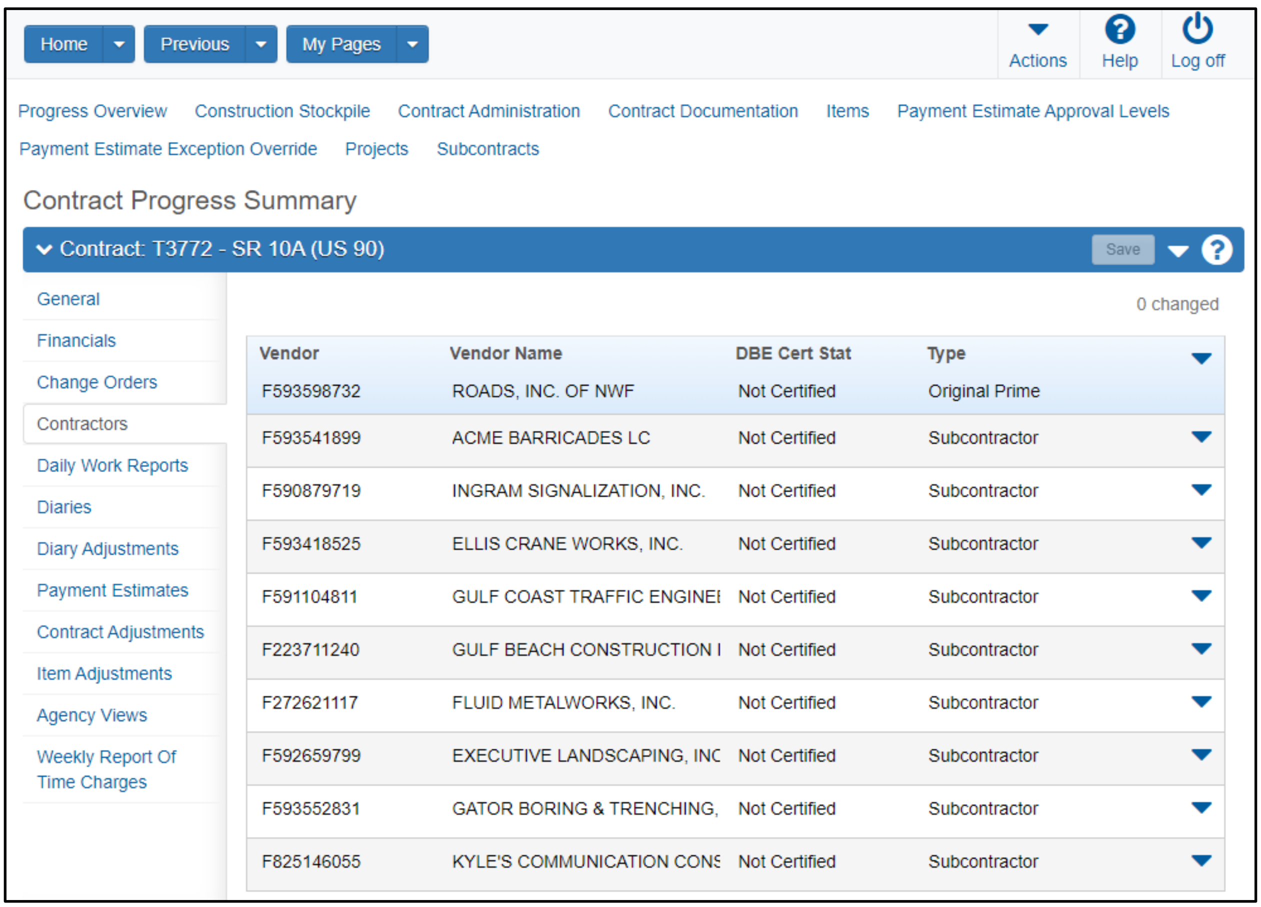


Figure 64. Contract Progress Summary – Contractors Tab

Instructions 67

Navigation: Construction > Contract Progress Summary > Contractors tab

To view a Contractors List:

1. Click the **Contractors** tab.
2. View the contractor information.

Viewing a Contract Daily Work Report

Daily Work Reports (DWRs) are created to document the work that is performed daily on a contract. The information recorded in a DWR is based on actual activity, not planned activity, and is essential for the administration of a contract.

For more detailed instructions on adding and modifying DWRs, see the *Daily Work Reports* section of this training guide.

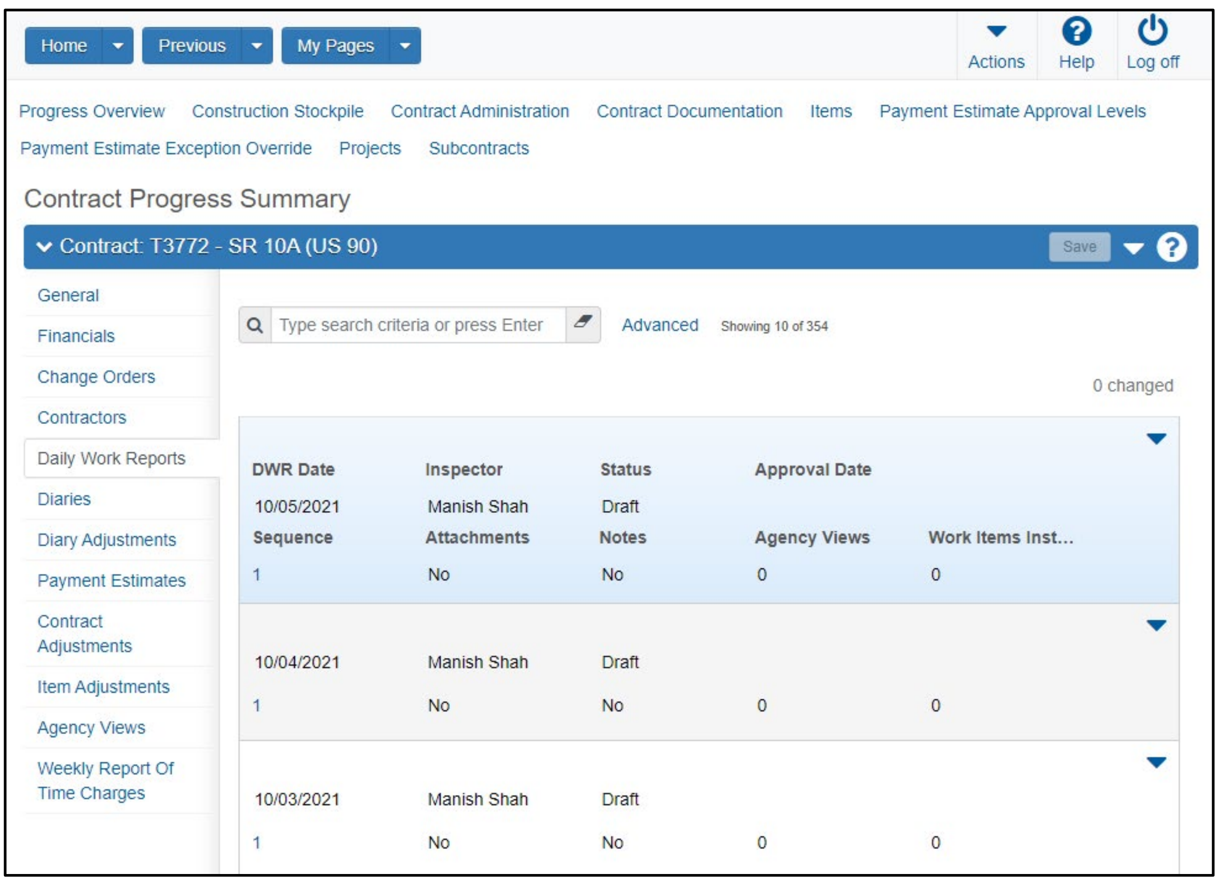


Figure 65. Contract Progress Summary – Daily Work Reports Tab

Instructions 68

Navigation: Construction > Contract Progress Summary > Daily Work Reports tab

To view DWR information:

1. Click the **Daily Work Reports** tab.
2. Search for and select the **Sequence** number of the DWR to view. **(Any)**
3. Click the **Contract Progress** quick link.

Viewing a Contract Daily Diary

On contracts set up with Available Time, a Daily Diary is a collection of all the Daily Work Reports (DWRs) submitted on one day by all inspectors working on a contract. The project manager usually submits one diary per day per contract. In the diary, the project manager authorizes the DWRs and records the time charge information for the day.

For more detailed instructions, see the *Daily Diaries* section of this training guide.

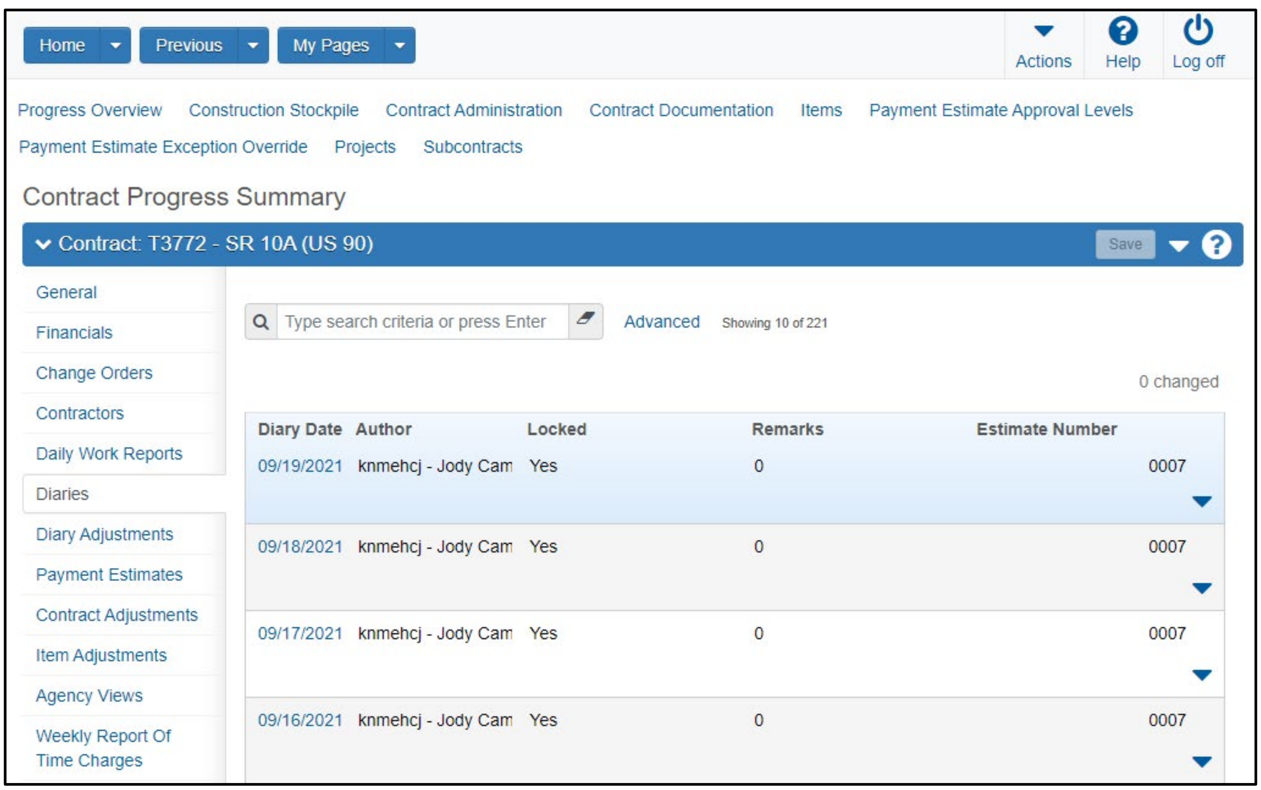


Figure 66. Contract Progress Summary – Diaries Tab

Instructions 69

Navigation: Construction > Contract Progress Summary > Diaries tab

To view diary information:

1. Click the **Diaries** tab.
2. Search for and select the diary date to view. **(Any)**
3. Click the **Contract Progress** quick link.

Viewing a Diary Adjustment

On contracts set up with Available Time, the Diary Adjustments tab on the Contract Progress Summary component enables you to make changes to contract times in a diary after the estimate has been created and approved and the diary is locked.

Required fields are:

- Current Time Charge

For more detailed instructions, see the *Daily Diaries* section of this training guide.

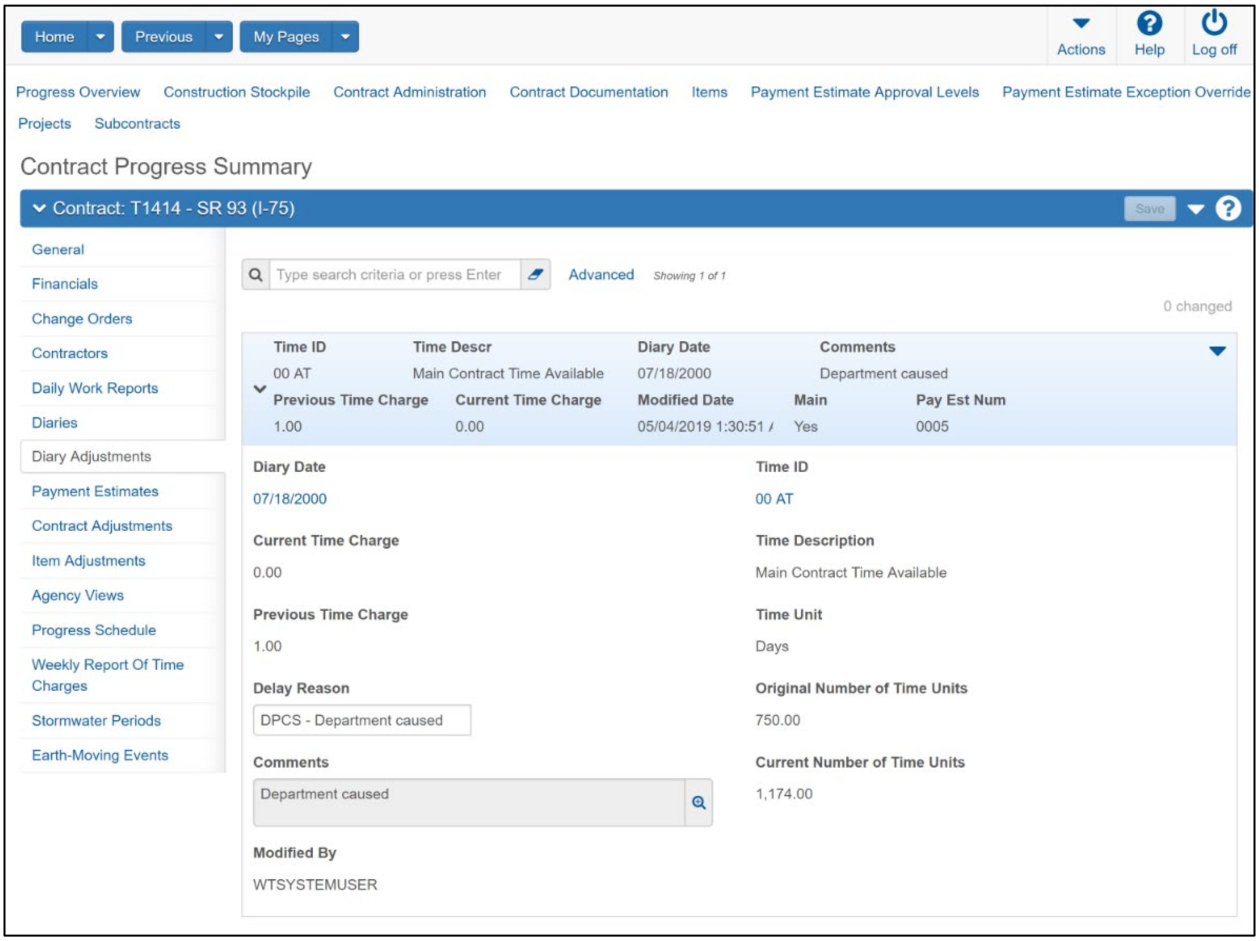


Figure 67. Contract Progress Summary – Diary Adjustments Tab

Instructions 70

Navigation: Construction > Contract Progress Summary > Diary Adjustments tab

To view diary adjustment information:

1. Click the **Diary Adjustments** tab.
2. View the diary adjustments.

Viewing a Payment Estimate

The Payment Estimates tab on the Contract Progress Summary includes a list of all the payment estimates recorded for the contract.

For more detailed instructions see the *Payment Estimates* section of this training guide.

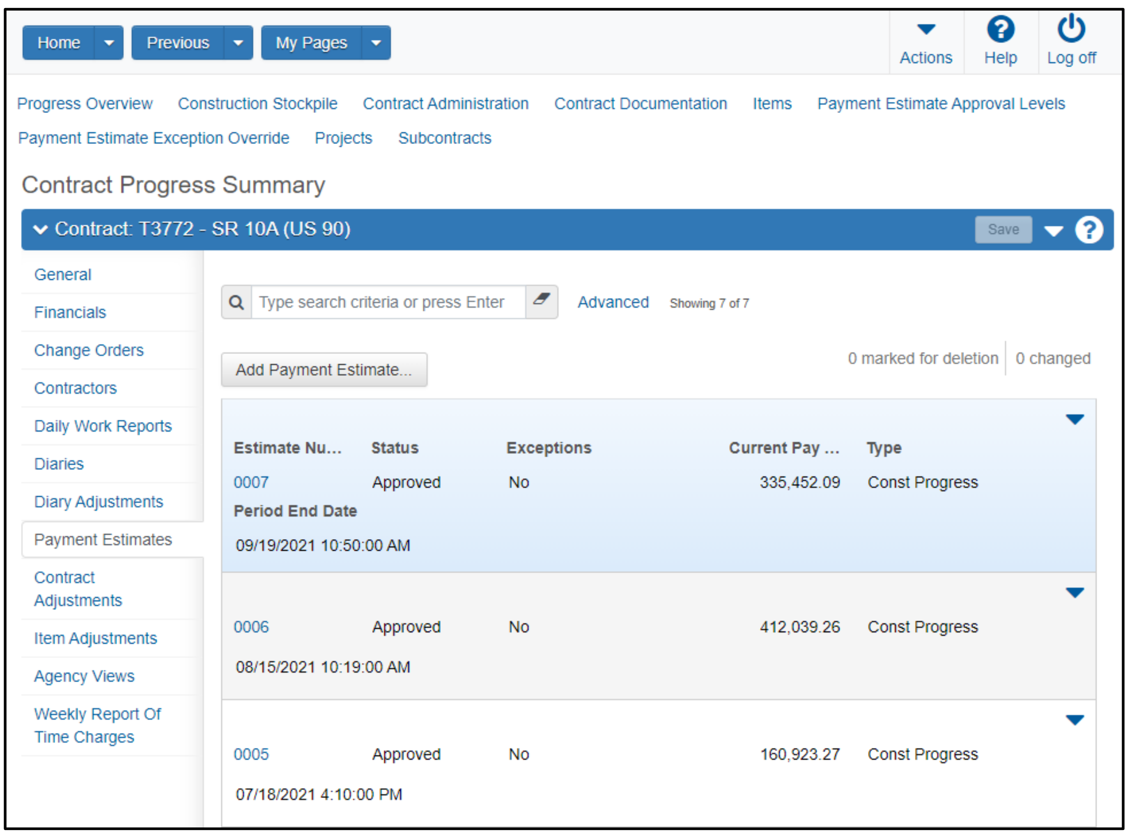


Figure 68. Contract Progress Summary – Payment Estimates Tab

Instructions 71

Navigation: Construction > Contract Progress Summary > Payment Estimates tab

To view a Payment Estimate:

1. Click the **Payment Estimates** tab.
2. Search for and select the estimates to review. **(Choose any to view)**
3. Click the **Contract Progress** quick link.

Viewing Contract Adjustments for a Payment Estimate

The Contract Adjustments tab on the Contract Progress Summary provides information about payment estimate adjustments at the contract level. Information is provided for all contract adjustments that exist for a payment estimate, including those generated by the system and manually-added adjustments. The information on this tab is for reference only and cannot be changed.

For more detailed instructions, see the *Payment Estimates* section of this training guide.

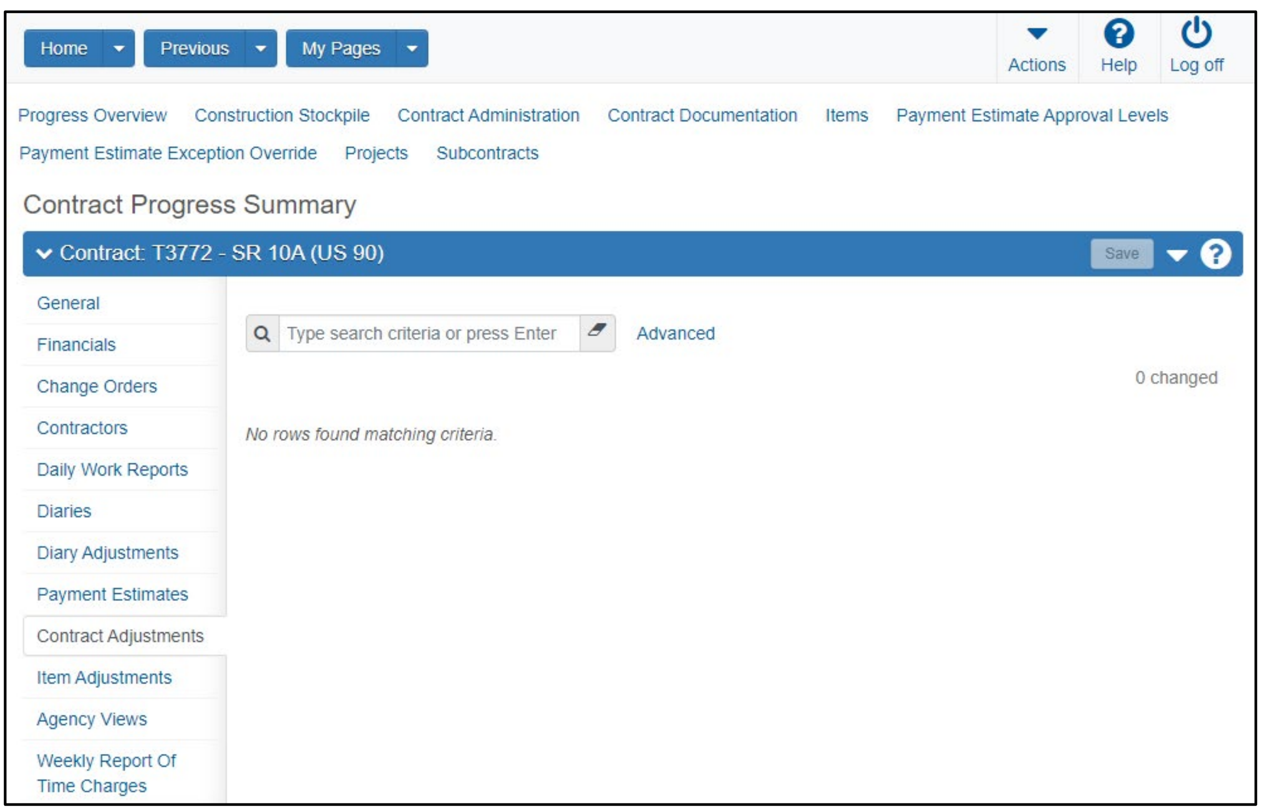


Figure 69. Contract Progress Summary – Contract Adjustments Tab

Instructions 72

Navigation: Construction > Contract Progress Summary > Contract Adjustments tab

To view a Contract Adjustment:

1. Click the **Contract Adjustments** tab.
2. Search for and select the adjustments to view. **(In training, there are no Contract Adjustments available to view)**

Viewing Item Adjustments for a Payment Estimate

The Item Adjustments tab on the Contract Progress Summary provides information about payment estimate adjustments at the item level. Item adjustments can result from item overruns, price changes, and for other reasons defined by FDOT. The information on this tab is for viewing only.

For more detailed instructions, see the *Payment Estimates* section of this training guide.

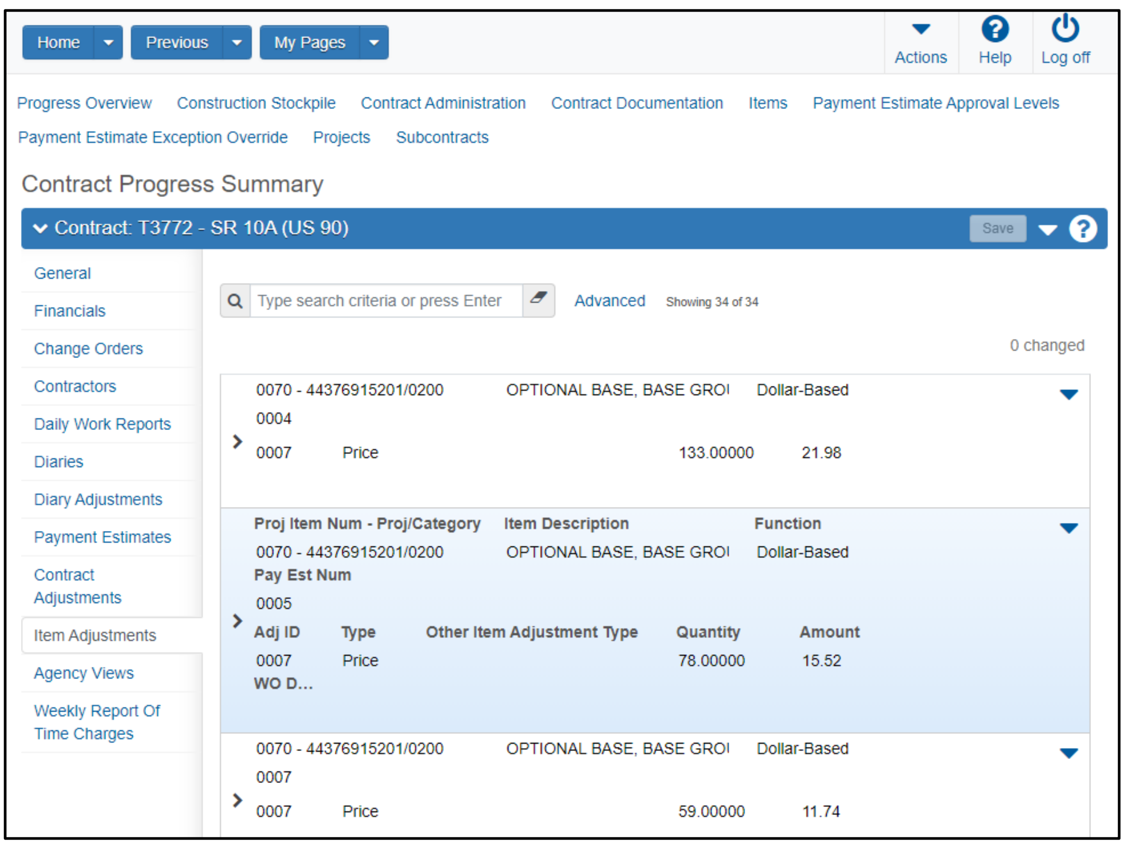


Figure 70. Contract Progress Summary – Item Adjustments Tab

Instructions 73

Navigation: Construction > Contract Progress Summary > Item Adjustments tab

To view an Item Adjustment:

1. Click the **Item Adjustments** tab.
2. Click the expand arrow for a row to view information about the adjustment. **(The first row)**

Maintaining Contract Associations with Agency Views

The Agency Views tab on the Contract Progress Summary contains a list of agency views associated with the contract. An agency view is a component created by FDOT to support a specific business function. A contract can have multiple active associations with agency views. Data in agency views can be modified only when the associated contract is in *Active* status.

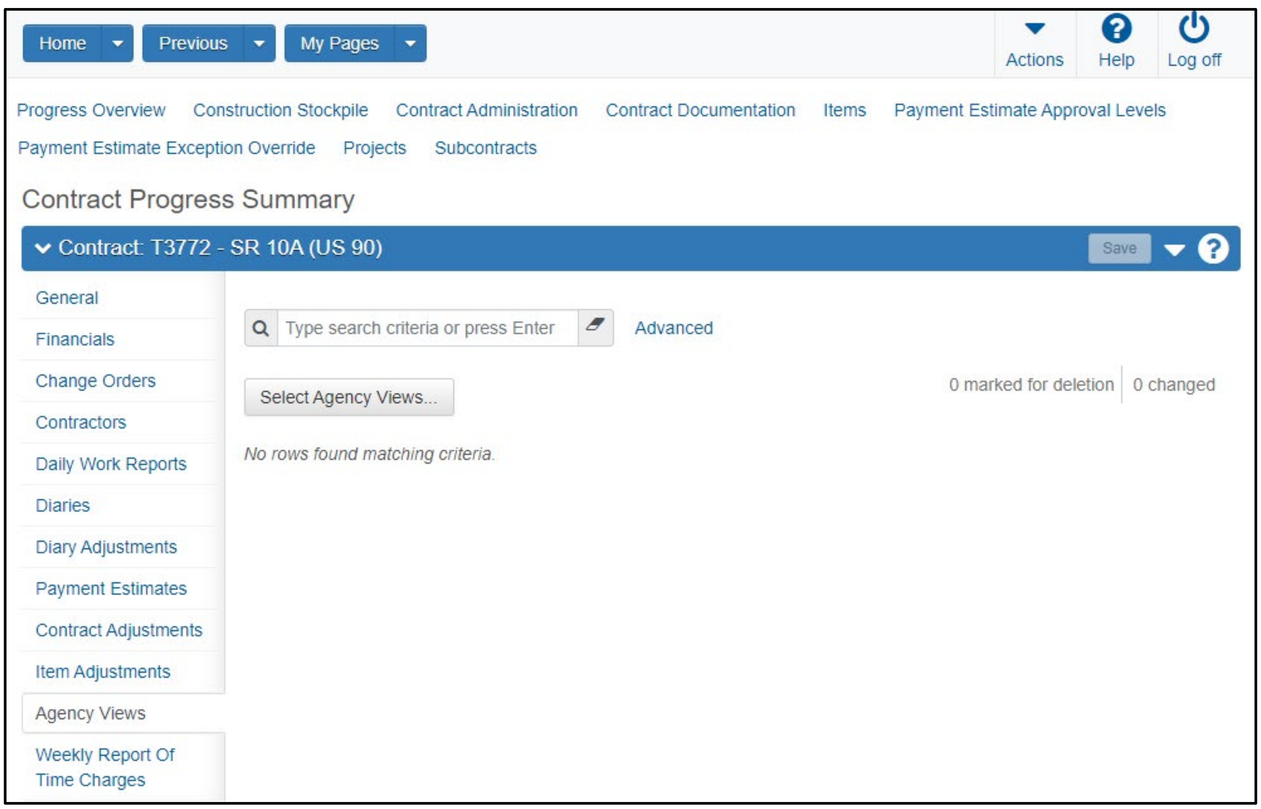


Figure 71. Contract Progress Summary – Agency Views Tab

Instructions 74

Navigation: Construction > Contract Progress Summary > Agency Views tab

To view agency views associated with the contract:

1. Click the **Progress Overview** quick link.
2. Search for the appropriate contract. **(TRNXX,** where XX is your assigned contract number**)**
3. Click the **Contract ID** link.
4. Click the **Agency Views** tab.
5. Click the **Select Agency Views…** button.
6. Search for and select the appropriate agency views. **(In training, no contract agency views are currently available for selection)**
7. Click the **Add to Contract** button.
8. For each agency view, in the **Effective Date** field, enter the date the time record is effective.
9. For each agency view, in the **Expiration Date** field, enter the date the time record expires.

   In general, FDOT recommends waiting to enter the Expiration Date until the date occurs.
10. For each agency view, in the **Status** field, click the drop-down arrow and select the status of the time record.
11. The **Active** field indicates whether each record is active or inactive, based on the effective and expiration dates, and the status.
12. Click the **Save** button.

Maintaining Contract Progress Schedules

FDOT will not use the Progress Schedule tab on the Contract Progress Summary.

Maintaining Weekly Time Charge Reports for a Contract

On contracts set up with Available Time, the Weekly Report of Time Charges tab on the Contract Progress Summary lists records of weekly reports generated for different contract times.

Required fields are:

- Week Ending
- Contract Time

For more detailed instructions, see the *Daily Diaries* section of this training guide.

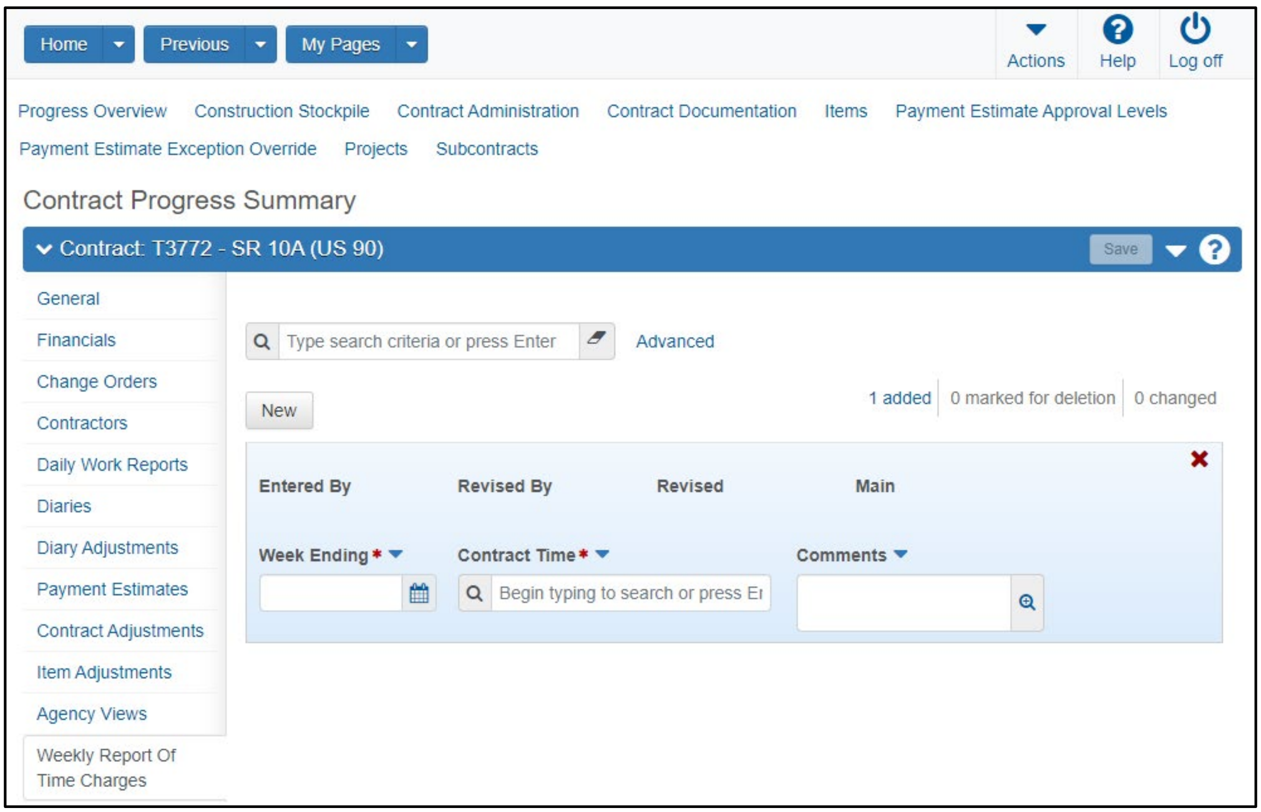


Figure 72. Contract Progress Summary – Weekly Report of Time Charges Tab

Instructions 75

Navigation: Construction > Contract Progress Summary > Weekly Report Of Time Charges tab

To generate a weekly report of time charges:

1. Click the **Weekly Report Of Time Charges** tab.
2. Search for and select the adjustments to view. **(**In training, there are no weekly time charge reports available to view.)

Maintaining Stormwater Periods

FDOT will not use the Stormwater Periods tab on the Contract Progress Summary.

Maintaining Earth-Moving Events

FDOT will not use the Earth-Moving Events tab on the Contract Progress Summary.

Adding a Contract Price Adjustment Index

Prices fluctuate greatly for some work items, such as fuel or items that contain oil. Price adjustment indexes are maintained to track changes in prices for specific work items. Price adjustment indexes also establish parameters for adjusting payment amounts when price changes exceed a certain value or percentage.

The Contract Price Adjustment Index Overview contains a list of all the price indexes currently associated with the contract.

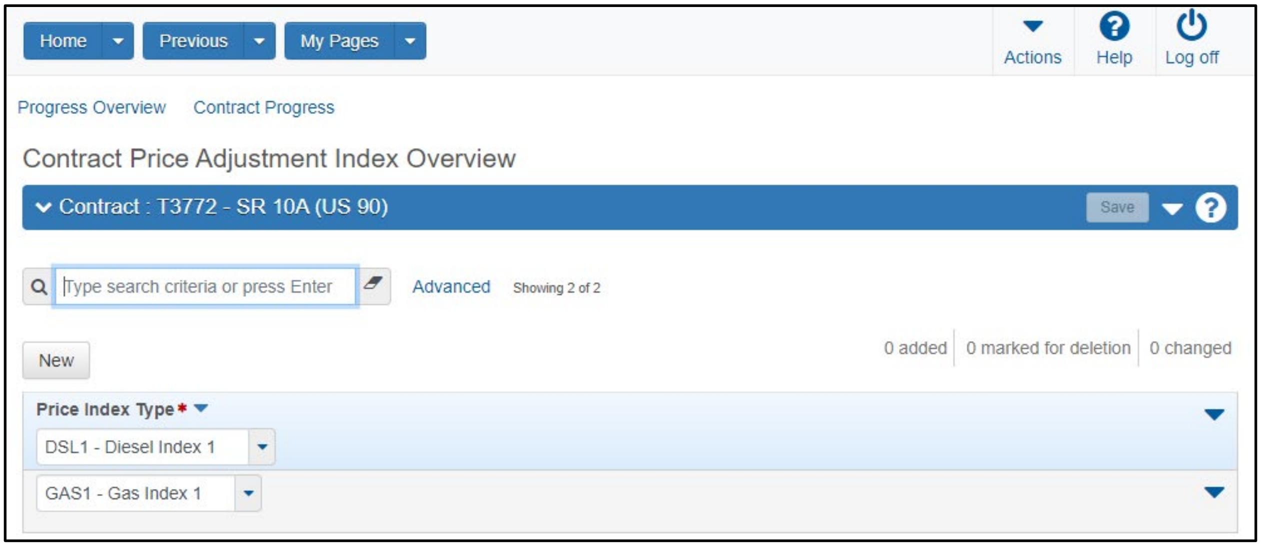


Figure 73. Contract Price Adjustment Index Overview

Instructions 76

Navigation: Construction > Contract Progress Summary

To add a Contract Price Adjustment Index:

1. Click the **Home** drop-down arrow and select the appropriate role. **(PrCDistOffAdmin)**
2. Click the component **Actions** menu on the **Contract Progress Summary** screen**.**
3. Click the **Contract Price Adjustment Index** link.
4. Click the **New** button.
5. Click the **Price Index Type** drop-down arrow and select the price index type. **(DSL2 – Diesel Index)**
6. As needed, click the **New** button and select additional price index types. **(GAS2 – Gas Index)**
7. Click the **Save** button.
8. Click the **Home** button.

Construction Stockpiles

A construction stockpile is money advanced to the contractor to purchase and store a material for a contract project item in bulk quantity. These advanced payments are recovered by the agency as work on the contract project item is paid for. Multiple stockpiles may be created for the same contract project item.

Adding a Construction Stockpile

Required fields are:

- Description
- Item Recovery Percentage
- Item

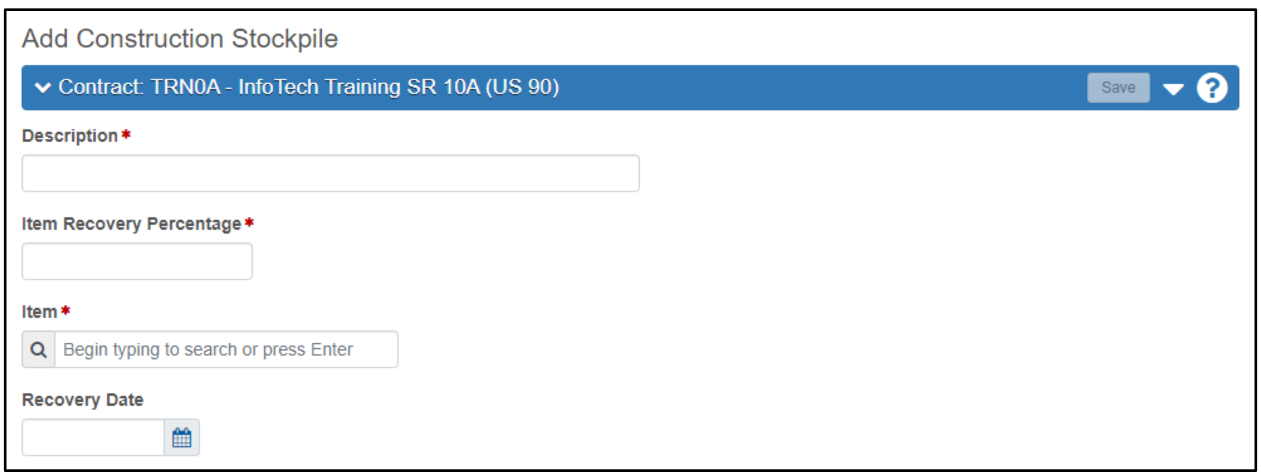


Figure 74. Adding a Stockpile

Instructions 77

Navigation: Construction > Contract Progress Summary > Construction Stockpile quick link

To record a stockpile transaction:

1. Click the **Home** button.
2. Click the **Home drop-down arrow** and verify the correct role is selected. **(PrCDistOffAdmin)**
3. Under the **Construction** component, click the **Contract Progress** link.
4. Search for and select the appropriate contract. (**TRNXX**, where XX is your assigned contract number)
5. From the **Contract Progress Summary** component, select the **Construction Stockpile** link.
6. Click the component **Actions** button and select **Add**.
7. In the **Description** field, enter a description for the stockpile record. **(THERMOPLASTIC STOCKPILE)**
8. In the **Item Recovery Percentage** field, enter the contract item percent complete for which the construction stockpile amount will have been fully recovered. **(92.07)**
9. In the **Item** field, search for and select the contract item number and description associated with the stockpiled material. **(0711 11123 THERMOPLASTIC, STANDARD, WHITE, SOLID, 12”)**
10. In the **Recovery Date** field, enter the date when the stockpile record recovery should begin. **(Today’s Date)**
11. Click the **Save** button.
12. The system displays the Construction Stockpile Summary component. If needed, record values in the **Material**, **Source**, **Facility**, and **SMFMI Name** fields.

Recording Stockpile Transactions

The lower portion of the **Construction Stockpile Summary** contains rows of stockpile transactions. Transactions are used to add initial amounts to the stockpile, associate stockpile amounts with project items, and to reduce the stockpile as work is performed. When a payment estimate is run on the contract, the system evaluates stockpile transactions and creates payment estimate item adjustments as appropriate.

Required fields are:

- Recovery Date

- Comments
- Item
- Constr Stockpile Amt

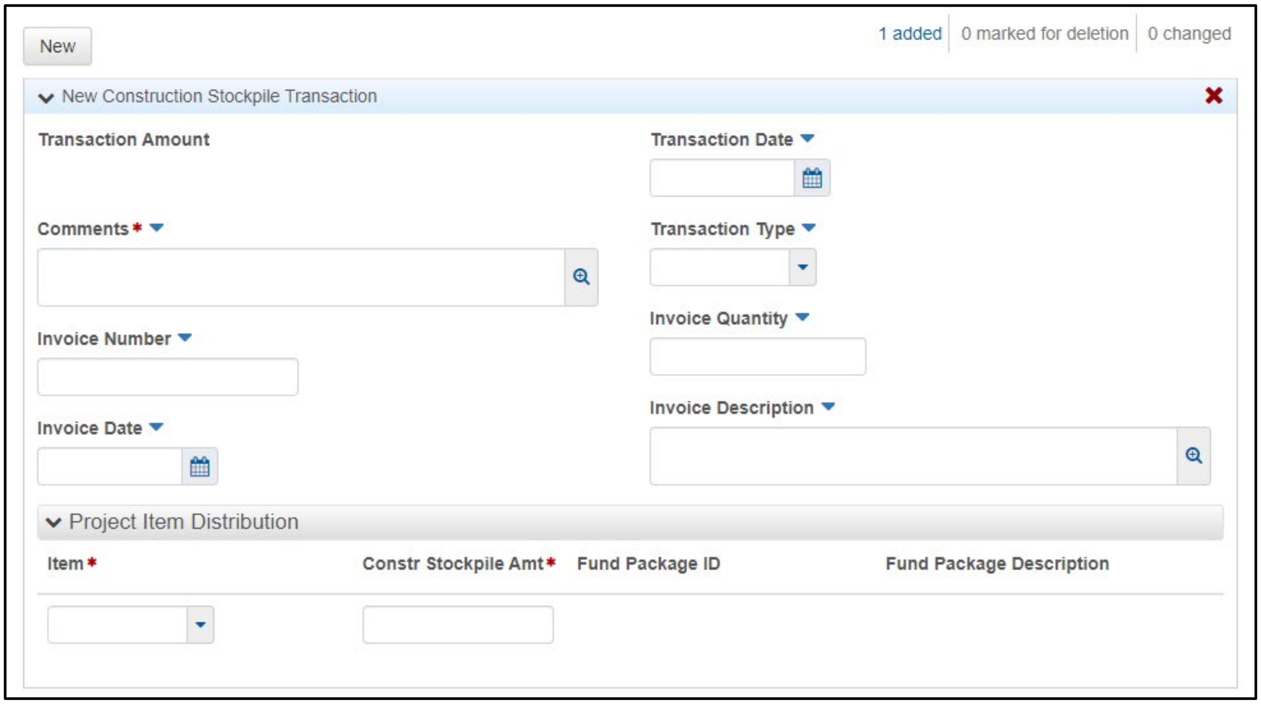


Figure 75. Adding a Stockpile Transaction

Instructions 78

Navigation: Construction > Contract Progress Summary > Construction Stockpile quick link > Constr Stockpile ID link

To record a stockpile transaction:

1. From the **Construction Stockpile Summary** component, if needed, click the **New** button.
2. In the **Recovery Date** field, enter the date when the stockpile record recovery should begin. This may have been previously entered when the stockpile record was initially created.
3. In the **Comments** field, enter information about the stockpile record. **(Initial transaction)**

4. In the **Invoice Number** field, enter the invoice number associated with the stockpile transaction. **(123456789)**
5. In the **Invoice Date** field, enter the date of the invoice associated with the stockpile transaction. **(Today's Date)**
6. In the **Transaction Date** field, enter the date on which the stockpile transaction took place. **(Today's Date)**
7. In the **Transaction Type** field, click the drop-down arrow and select the type of stockpile transaction: Initial Delivery, Reduction of Stockpile, or Replenish Stockpile. **(STMI)**
8. In the **Invoice Quantity** field, enter the quantity included on the invoice for the stockpile transaction. **(6000)**
9. In the **Invoice Description** field, enter a description for the invoice associated with the stockpile transaction.
10. In the **Project Item Distribution** section, in the **Item** field, click the drop-down arrow and select the item, project, and category to which to distribute a portion of the stockpile transaction. (**0175 – TRXX6915201 – 0300**, where XX is your assigned contract number)
11. In the **Constr Stockpile Amt** field, enter the amount of the stockpile transaction to associate to that item project and category. **(6000)**
12. Enter additional rows as needed to distribute the stockpile transaction.
13. Click the **Save** button.

Pausing and Resuming Stockpile Recovery

When a new payment estimate is generated, the system will create a stockpile line item adjustment amount for the DWR item posting, unless you have paused the stockpile recovery.

To pause a stockpile recovery, click to select the **Paused** field. Then, click the **Save** button.

When you resume a stockpile recovery, the system will recalculate the stockpile line item adjustment amount with an updated recovery rate when a new payment estimate is generated. To resume a stockpile recovery, remove the check from the **Paused** field. Then, click the **Save** button.

Closing a Construction Stockpile

Note: Closed stockpiles cannot be deleted or replenished with additional transactions.

Instructions 79 – Outside of Training

Navigation: Construction > Contract Progress Summary > Construction Stockpile quick link

To close a stockpile that has a zero balance:

1. From the **Construction Stockpile Overview** component, locate the stockpile row.
2. Click the row **Actions** button and select **Close Stockpile**.

Reviewing Stockpile Adjustments

The Review tab allows you to view a list of all stockpile adjustments for the contract, including those added by the system. You cannot change or delete information in this list.

Instructions 80 – Outside of Training

Navigation: Construction > Contract Progress Summary > Construction Stockpile quick link

To review stockpiles for a contract:

1. From the **Construction Stockpile Overview**, select the **Construction Stockpile Review** quick link.
2. For each row, review the stockpile information.
3. Expand each row to view additional information.

Daily Work Reports

Managing Daily Work Reports

Daily Work Reports (DWRs) are created to document the work that is performed daily on a contract. The information recorded in a DWR is based on actual activity, not planned activity, and is essential for the administration of a contract. Daily information is recorded about the weather, the personnel who worked at the construction site and the equipment used, installed work items, locations and quantities. This data is collected in the field by the project manager, project engineer, and the inspectors working on the contract. Multiple DWRs may be created per day.

Each DWR must be approved before the information recorded can be submitted on a Daily Diary, and included on a payment estimate. When a DWR is submitted for approval, it is either approved or sent back to be modified and resubmitted. The project manager can review or print all the information in one or more DWRs by generating a DWR Report.

Please note that depending on the roles you are assigned, you may not have access to all the functionality shown in this training guide.

Note: For information about the Info Tech Mobile Inspector application, and for information about how DWRs can be created with the Mobile Inspector application, see the *Using Mobile Inspector with AASHTOWare Project Construction & Materials* section in the *AASHTOWare Project Construction & Materials™ User's Guide for Construction*.

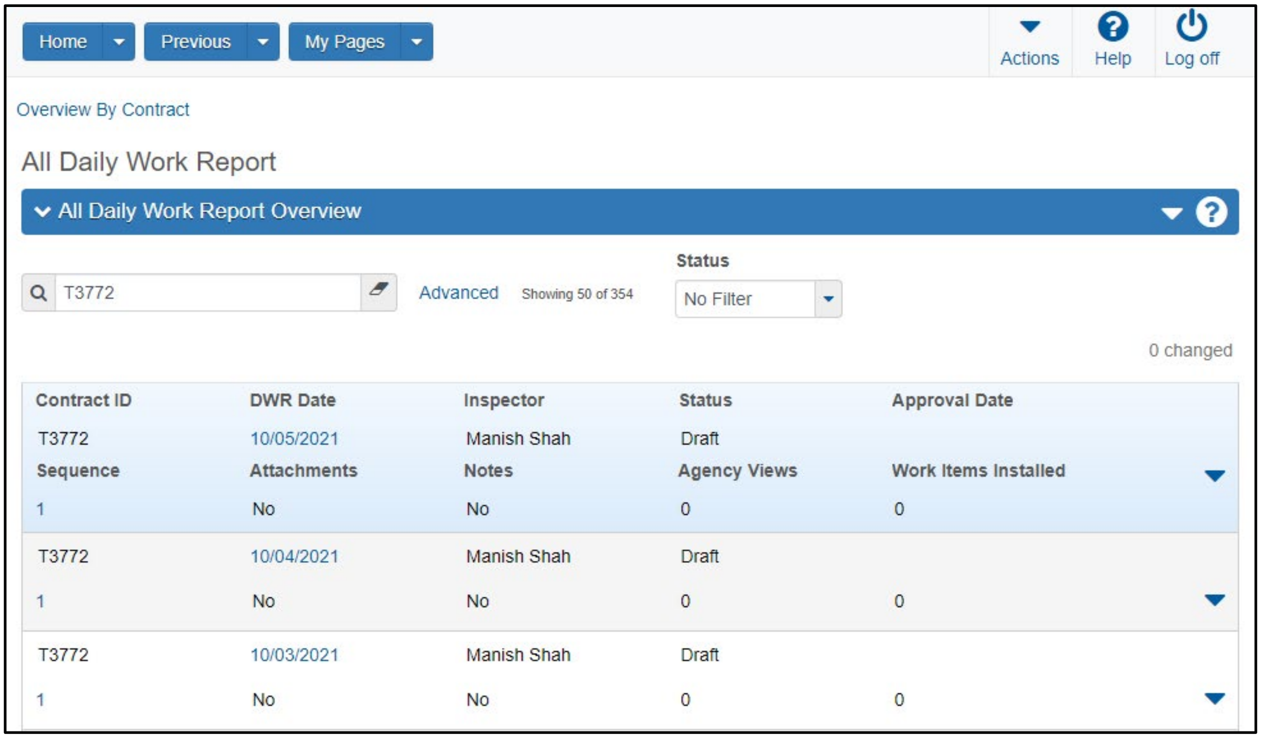


Figure 76. Daily Work Report Overview

Adding a Daily Work Report

Required fields are:

- DWR Date
- Inspector

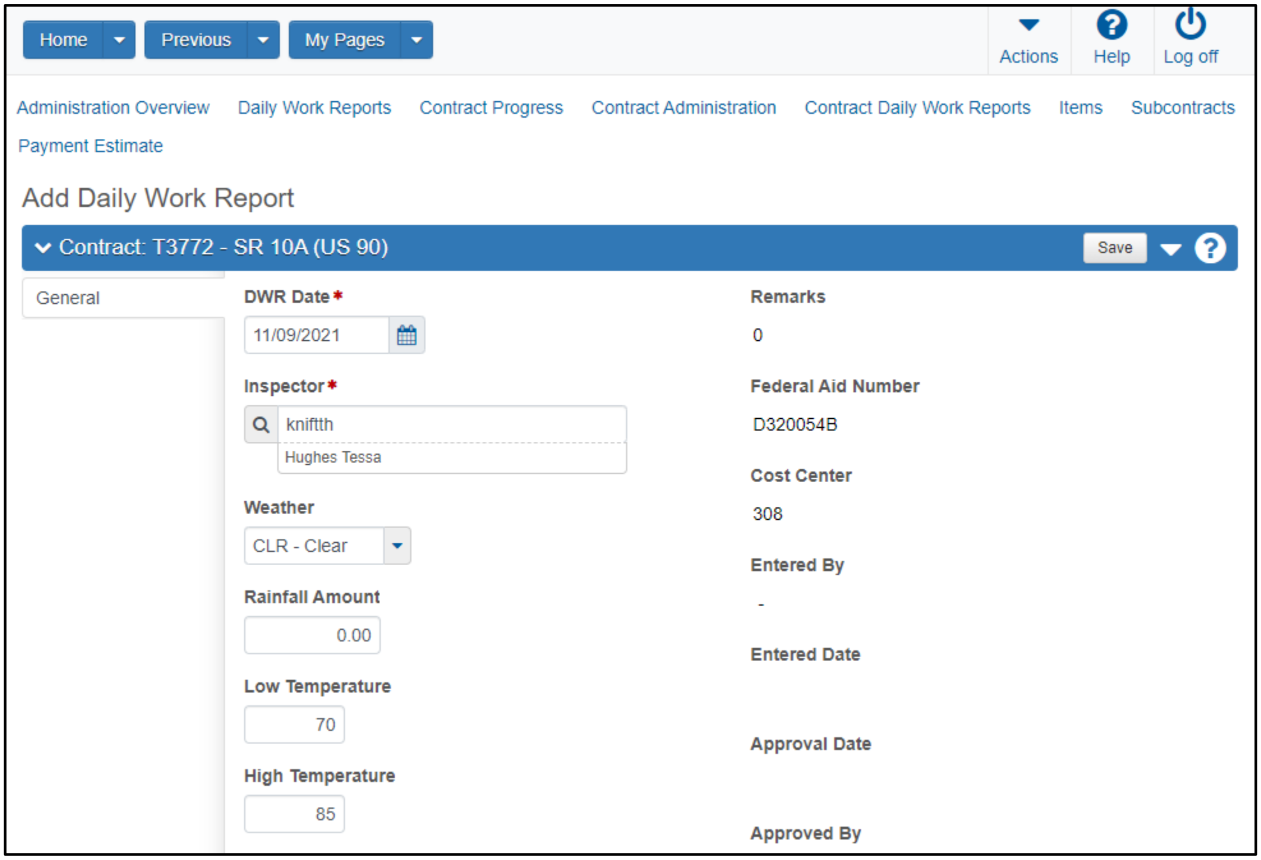


Figure 77. Add Daily Work Report

Instructions 81

Navigation: Construction > Daily Work Reports

Note: Navigation may also be Construction > Daily Works Reports by Contract. This displays the Daily Work Report by Contract Overview component.

To add a DWR on a contract for which DWRs are not currently listed:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCInspector)**
2. In the **Construction** component, click the **Daily Work Reports** link.

3. On the **All Daily Work Report** component, click the component **Actions** button, and choose the **Select Contract to Add DWR** action.
4. Search for and select the contract ID to which to add a DWR. **(TRNXX,** where XX is your assigned contract number**)**
5. Click the **Create DWR on Contract** button.
6. In the **DWR Date** field, enter the date for the DWR. **(Today's Date)**
7. In the **Inspector** field, note that your user ID has been recorded as the inspector associated with this DWR.
8. In the **Weather** field, click the drop-down arrow and select the appropriate weather condition. **(CLR - Clear)**
9. In the **Rainfall Amount** field, enter the amount of rainfall recorded for the DWR date, if appropriate. **(0)**
10. In the **Low Temperature** field, enter the low temperature recorded for the DWR date. **(70)**
11. In the **High Temperature** field, enter the high temperature recorded for the DWR date. **(85)**
12. The **Contractors Onsite** field indicates whether a contractor is recorded on the DWR.

    Contractors will be added later.
13. The **Daily Staff Onsite** field indicates whether any daily staff are recorded on the DWR.

    Daily Staff will be added later.
14. The **Attachments** field indicates whether there are attachments associated with this DWR.
15. In the **Remarks** section, in the **Type** field, click the drop-down arrow and select the appropriate remark type. **(CITW – Controlling Items of Work)**
16. In the **Remarks** field, enter remarks for the day. **(First DWR)**
17. The **Remarks** field indicates the number of remarks.
18. The **Federal Project Number** field indicates the project number assigned by the federal government.
19. The **State Project Number** field indicates the project number assigned by the state government.
20. The **Entered By** field indicates the user ID and name of the person that created the DWR.
21. The **Entered Date** field indicates the date and time the record was added to the system.
22. The **Approval Date** field indicates the date that the DWR was approved.

23. The **Approved By** field indicates the user who approved the DWR.
24. The **Payment Est Num** field indicates the number generated by the system and assigned to the contract payment estimated when it is created.
25. The **Payment Est Status** field indicates the status of the payment estimate.
26. The **Agency Views** field indicates whether agency views are associated with a contract item posted to this DWR.
27. The **Work Items Installed** field indicates whether any work items are recorded on the DWR.
28. Click the **Save** button.

Maintaining a Contract Daily Work Report

The Contract Daily Work Report Summary contains all the information currently recorded for the Daily Work Report.

Note: You can only change or delete DWRs with a status of *Draft*. When you delete a draft DWR all DWR child records are also deleted. You cannot change a DWR that is included in a payment estimate.

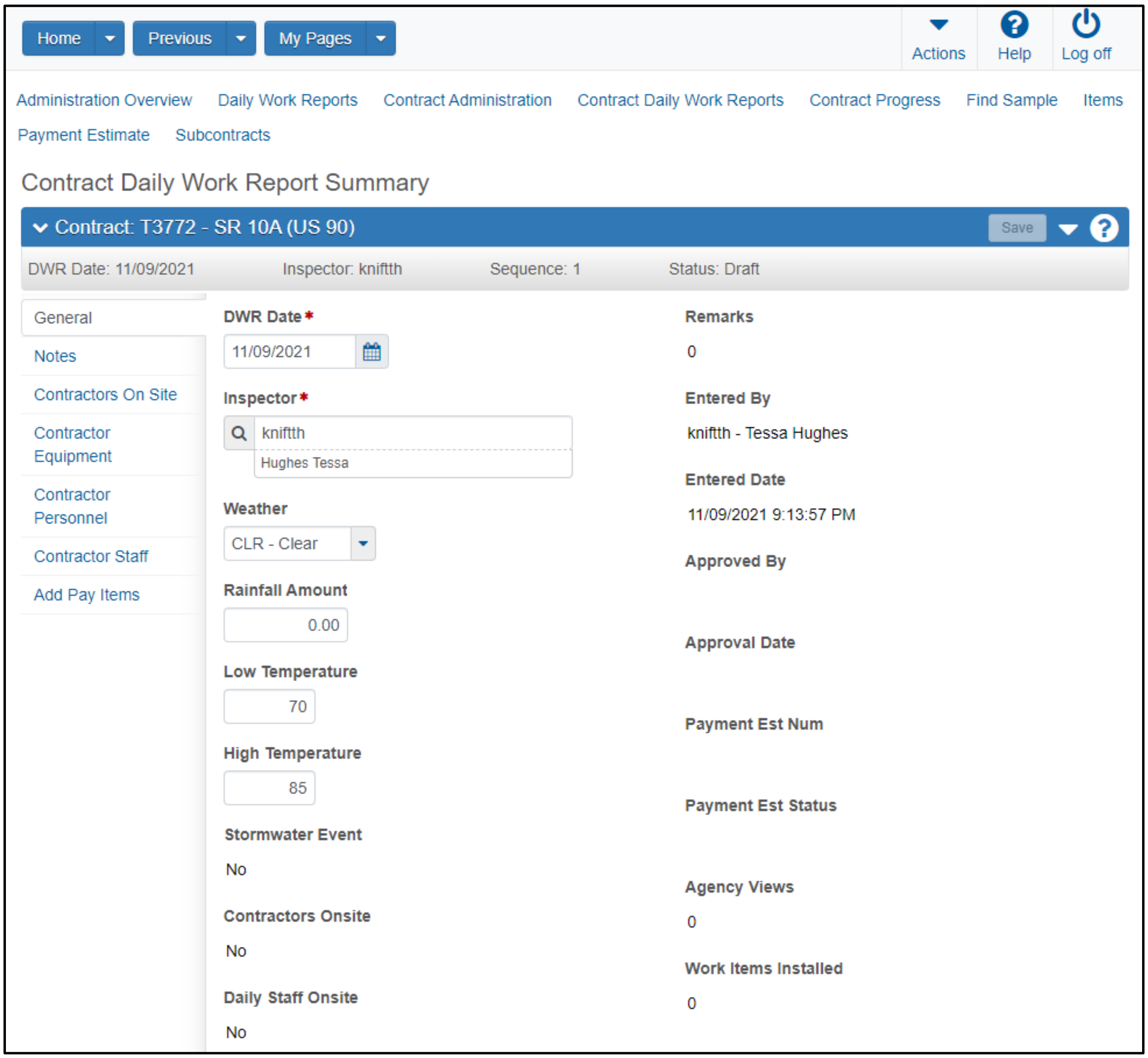


Figure 78. Contract Daily Work Report Summary

Recording Notes on a DWR

Notes may contain any type of information related to the DWR and can be added or deleted at any time, regardless of the DWR status.

Required fields are:

- DWR Note

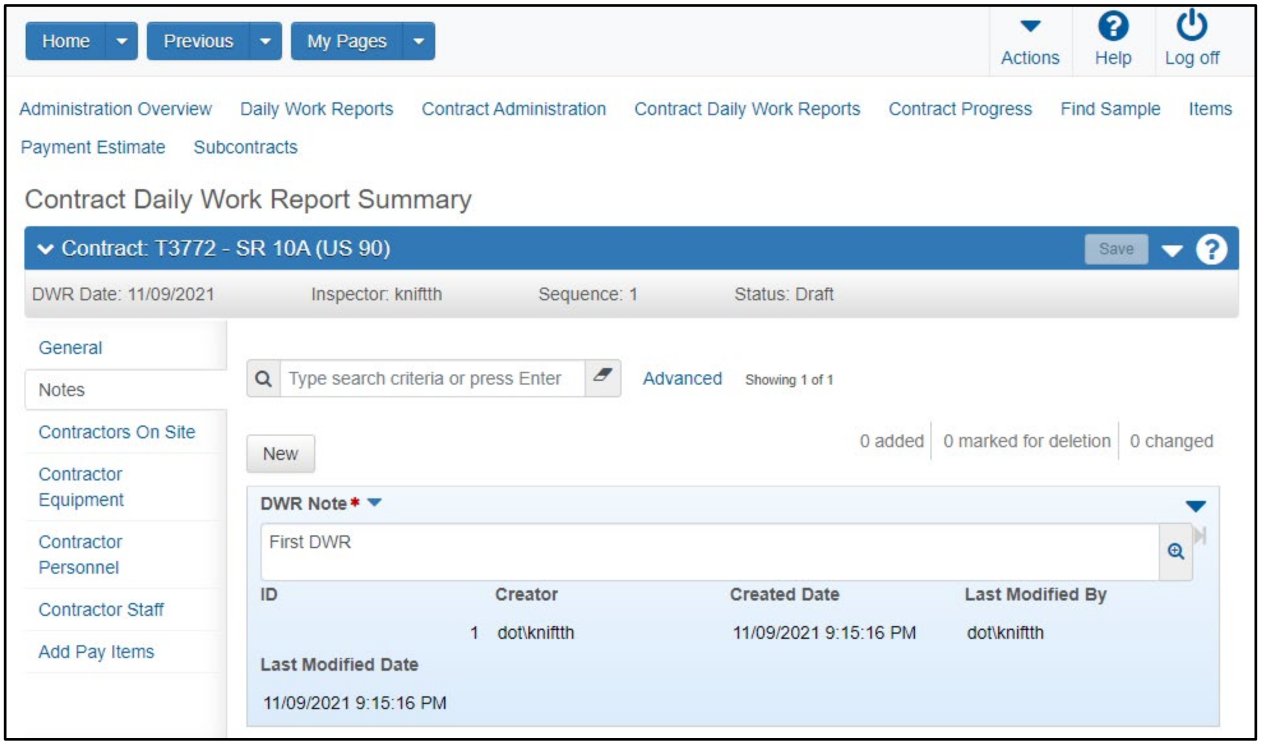


Figure 79. Daily Work Report - Notes tab

Instructions 82

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary > Notes tab

To add information on the Notes tab:

1. Click the **Notes** tab.
2. Click the **New** button.
3. Enter the appropriate information in the **DWR Note** field. **(First DWR)**
4. Click the **Save** button.

Adding Contractors On Site

The Contractors on Site tab on the Contract Daily Work Report Summary contains a list of all the contractors that were observed on the construction site on the DWR date.

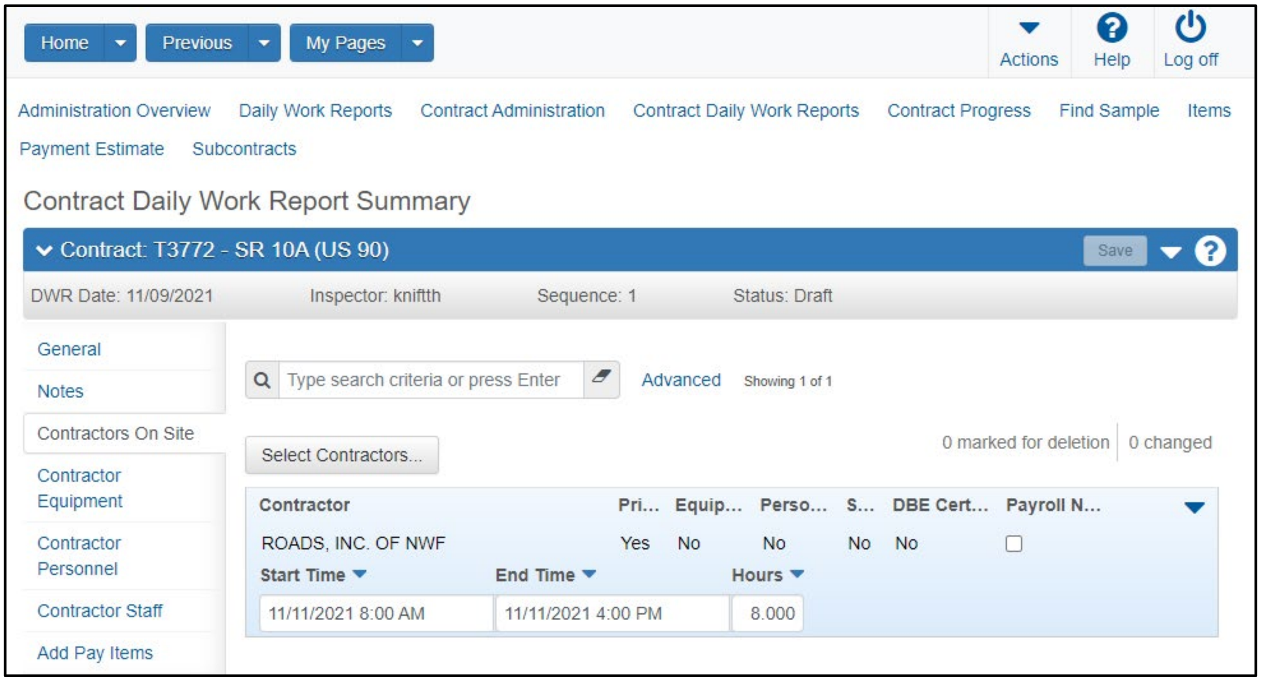


Figure 80. Daily Work Report - Contractors On Site tab

Instructions 83

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary > Contractors On Site tab

To add information to the Contractors On Site tab:

1. Click the **Contractors On Site** tab.
2. Click the **Select Contractors** button.
3. Search for and select the contractor(s) for this DWR. **(Select both ROADS, INC OF NWF and BOB'S BARRICADES, INC.)**
4. Click the **Add to DWR Contractors** button.
5. In the **Start Time** field, enter the time of day this contractor was first observed on site for this DWR. **(Today at 8:00 AM)**
6. In the **End Time** field, enter the time of day this contractor was last observed on site for this DWR. **(Today at 4:00PM)**

7. In the **Hours** field, enter the total time the contractor was observed on the construction site on the DWR date. **(8.000 for both Contractors)**
8. The **Prime** field indicates whether the contractor is the prime contractor on the contract.
9. The **Equipment** field indicates whether the contractor has equipment being reported on this DWR.
10. The **Person** field indicates whether this contractor has personnel being reported on this DWR.
11. The **Staff** field indicates whether this contractor has staff being reported on this DWR.
12. The **DBE Certified** field indicates whether this contractor is certified as a DBE vendor.
13. The **Payroll Not Required** check box indicates whether the Overdue Payrolls Exception evaluation will be performed on a pay estimate for this Contractor for the DWR Date.
14. Click the **Save** button.

Adding Contractor Equipment on a DWR

The Contractor Equipment tab on the Contract Daily Work Report Summary contains a list of equipment being reported on this DWR for each contractor on site. Equipment records are grouped by contractor in accordion rows. The equipment must have been previously added to the contractor vendor assets records.

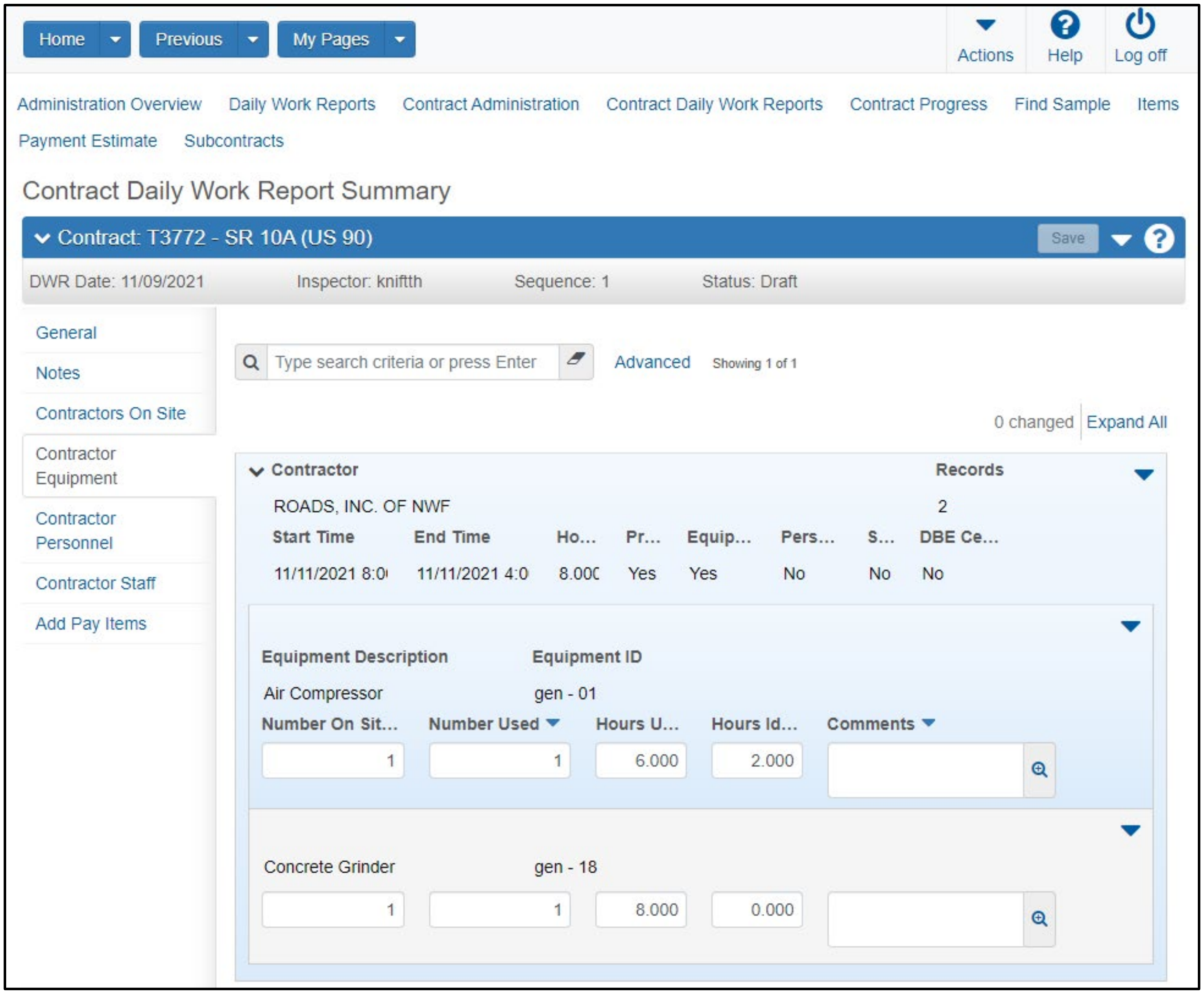


Figure 81. Daily Work Report - Contractor Equipment tab

Instructions 84

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary > Contractor Equipment tab

To add information on the Contractor Equipment tab:

1. Click the **Contractor Equipment** tab.
2. Click the row **Actions** button for the contractor associated with this DWR, and choose the **Select Equipment…** action. **(PRIME CONTRACTOR: ROADS, INC OF NWF)**
3. Search for and select the appropriate contract vendor equipment ID(s). **(gen – 01 Air Compressor** and **gen – 18 Concrete Grinder)**
4. Click the **Add to DWR Contractor Equipment** button.
5. If needed, click the expand arrow for the contractor record.
6. In the **Number On Site** field, enter the number of pieces of the equipment on site on the DWR date. **(Air Compressor: 1, Concrete Ginder: 1)**
7. In the **Number Used** field, enter the number of pieces of the equipment used on site on the DWR date. **(Air Compressor: 1, Concrete Ginder: 1)**
8. In the **Hours Used** field, enter the number of hours the equipment was used on the DWR date. **(Air Compressor: 6.000, Concrete Ginder: 8.000)**
9. In the **Hours Idle** field, enter the number of hours the equipment was idle on the DWR date. **(Air Compressor: 2.000, Concrete Ginder: 0.000)**
10. In the **Comments** field, enter any additional information about the record.
11. Click the **Save** button.

Adding Contractor Personnel on a DWR

Vendor personnel are employees of the vendor who are paid on an hourly basis. The personnel must have been previously added to the contractor vendor assets records.

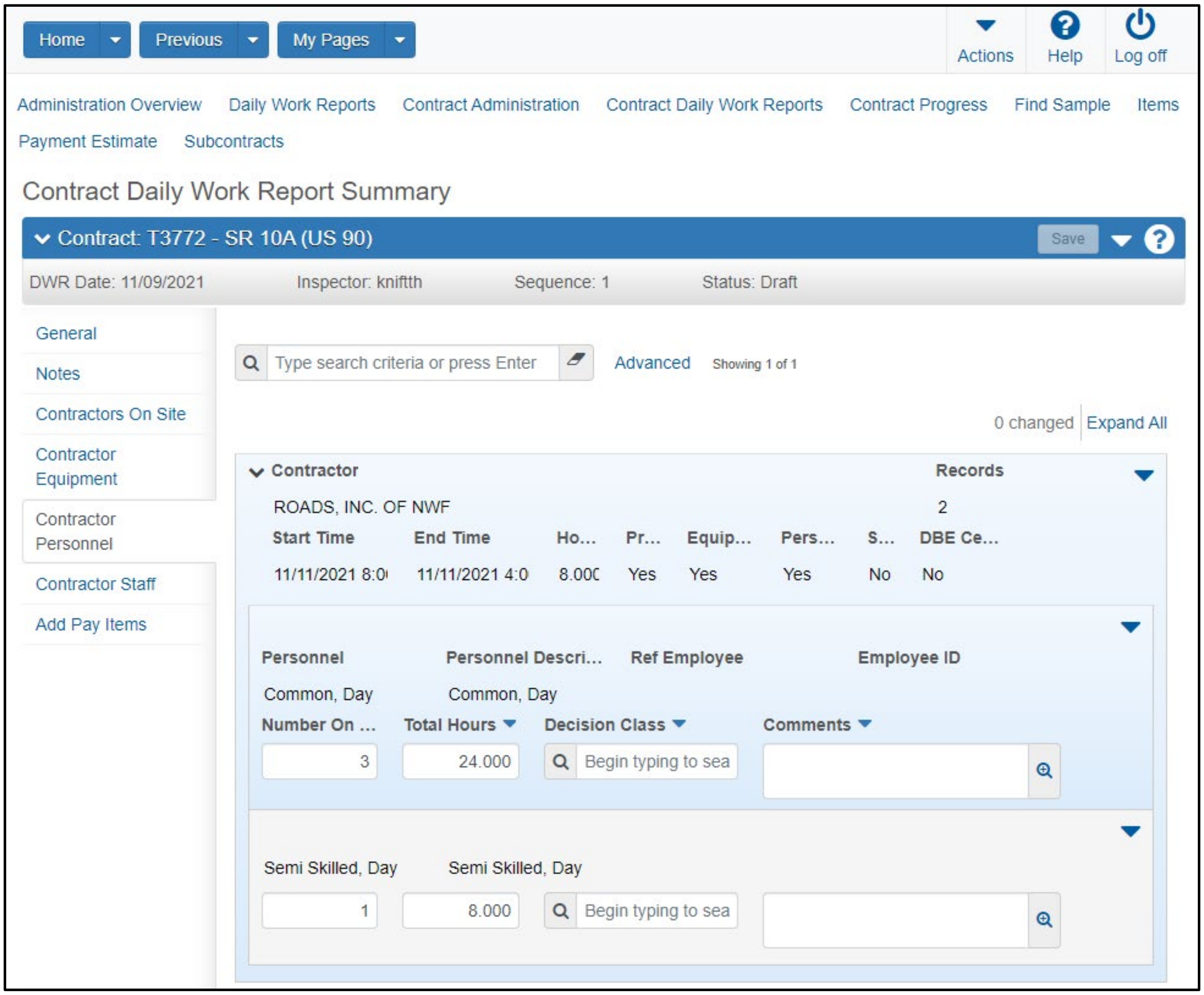


Figure 82. Daily Work Report - Contractor Personnel tab

Instructions 85

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary > Contractor Personnel tab

To add information on the Contractor Personnel tab:

1. Click the **Contractor Personnel** tab.
2. For the appropriate contractor, click the row **Actions** button, and choose the **Select Personnel…** action. **(PRIME CONTRACTOR: ROADS, INC OF NWF)**
3. Select the personnel records to associate with the DWR. **(Common, Day** and **Semi Skilled, Day)**
4. Click the **Add to DWR Contractor Personnel** button.
5. In the **Number On Site** field, enter the count of how many of this type of personnel to record on this DWR date for this contractor. **(Common, Day: 3; Semi Skilled, Day: 1)**
6. In the **Total Hours** field, enter the total number of hours worked by this person for this DWR contractor on this date. **(Common, Day: 24.000; Semi Skilled, Day: 8.000)**
7. In the **Decision Class** field, click the drop-down arrow and select the decision class code associated with the person recorded as personnel for this DWR contractor on this date.
8. In the **Comments** field, enter any additional information about the record.
9. Click the **Save** button.

Adding Contractor Staff on a DWR

Employees of the vendor who are paid on a salaried basis are referred to as vendor staff. The staff members must have been previously added to the contractor vendor assets records.

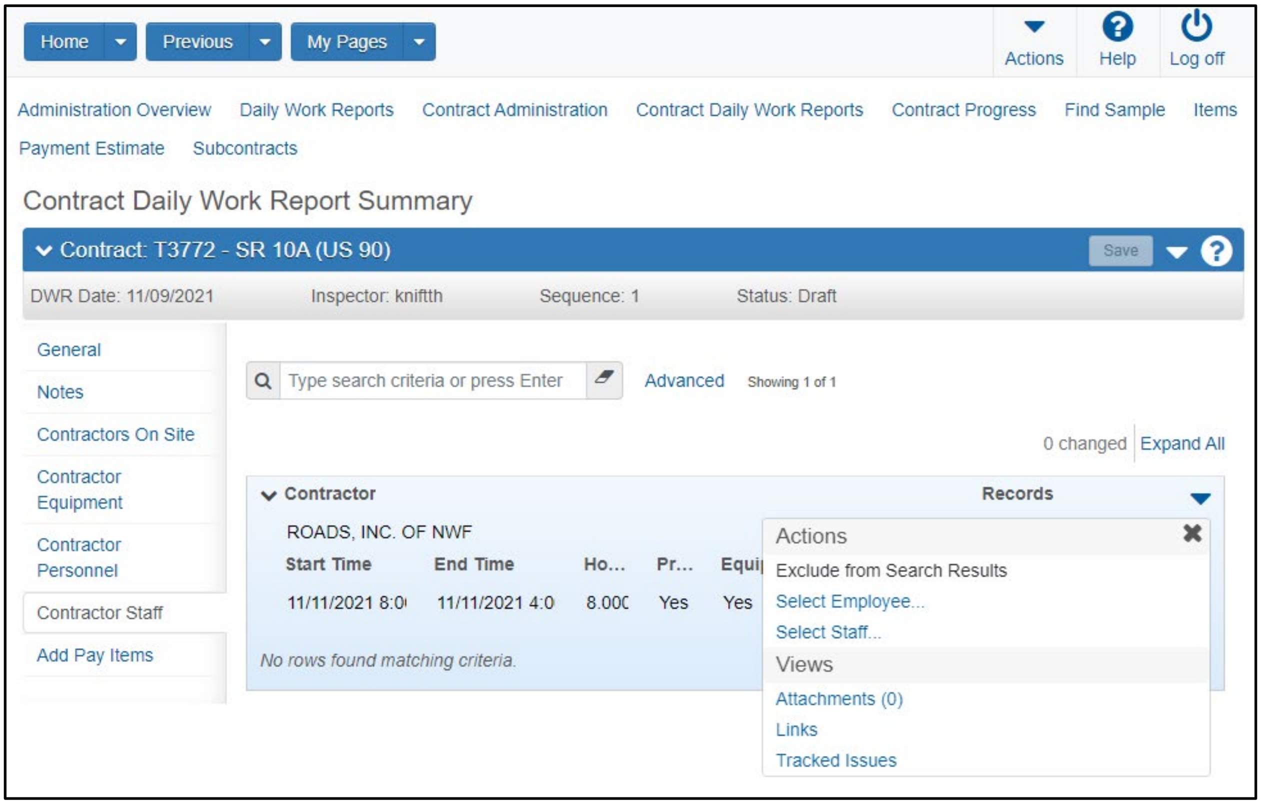


Figure 83. Daily Work Report - Contractor Staff tab

Instructions 86

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary > Contractor Staff tab

To add information to the Contractor Staff tab:

1. Click the **Contractor Staff** tab.
2. For the appropriate contractor, click the row **Actions** button, and choose the **Select Staff…** action. **(Prime Contractor: ROADS, INC OF NWF))**
3. Search for and select staff members to add to the DWR. **(Superintendent, Day)**
4. Click the **Add to DWR Contractor Staff** button.
5. In the **Number On Site** field, enter the count of how many of this type of staff has been added to the DWR for this DWR contractor on this date. **(1)**
6. In the **Total Hours** field, enter the total number of hours worked by this person recorded as personnel for this DWR contractor on this date. **(8.000)**
7. In the **Decision Class** field, click the drop-down arrow and select the decision class code associated with the person recorded for this DWR contractor.
8. In the **Comments** field, enter additional information about the record.
9. Click the **Save** button.

Adding Pay Items to a DWR

The FDOT Pay Item Tracking System (PTS) will be used to transfer item quantities into AASHTOWare Project Construction & Materials, where FDOT staff can adjust the quantities as needed.

The Add Pay Items tab on the Contract Daily Work Report Summary contains a list of all the items posted on this DWR for each contractor on site. Pay items are grouped by Item ID in accordion rows.

Note: To save the record, you must enter either station information or location information.

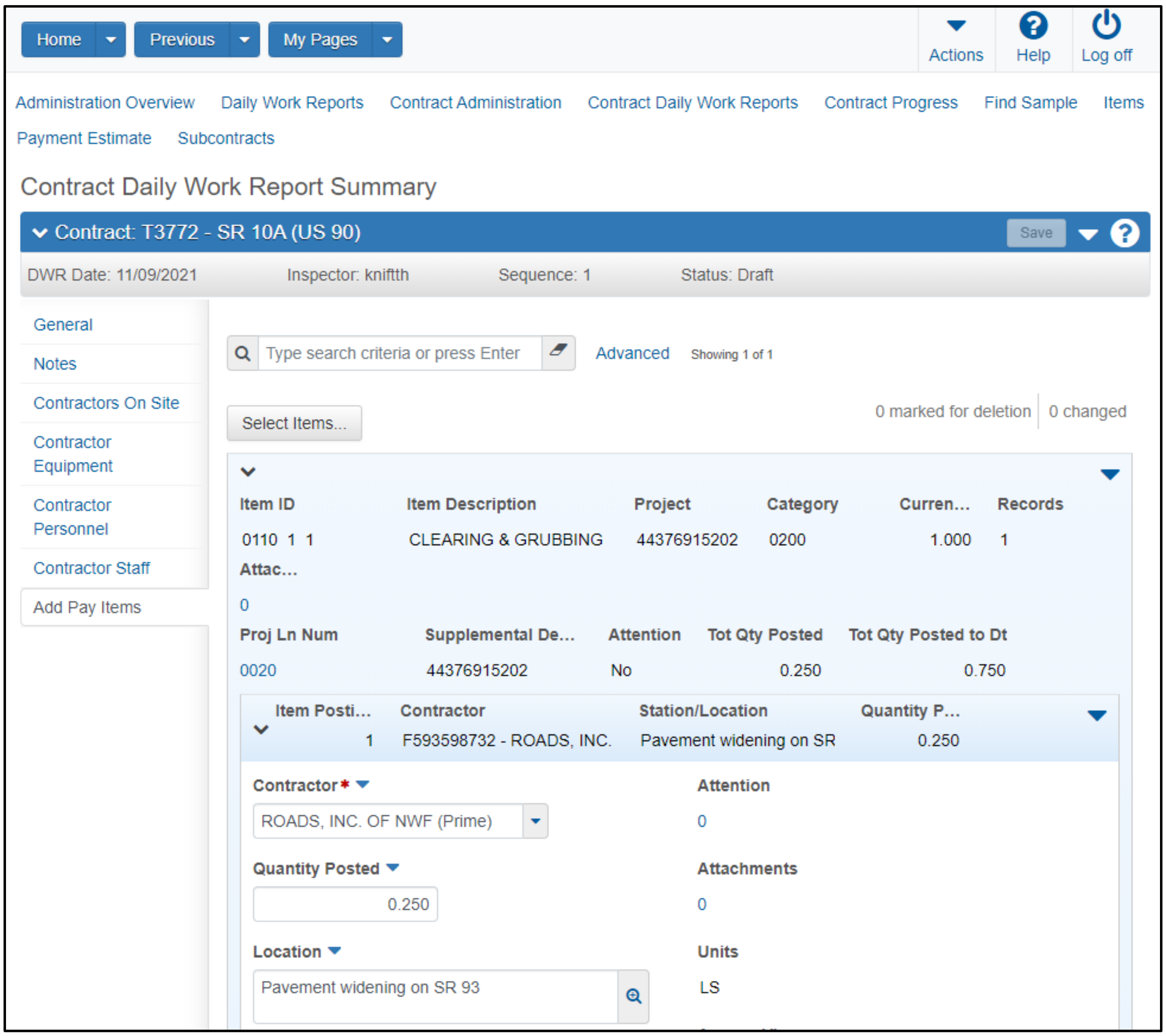


Figure 84. Daily Work Report - Add Pay Items tab

Instructions 87

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary > Add Pay Items tab

To add item postings to the DWR:

1. Click the **Add Pay Items** tab.
2. Click the **Select Items**… button.
3. Search for and select the contract item to add to the DWR. **(1-CLEARING & GRUBBING)**
4. Click the **Save** button.
5. Click the expand arrow for the newly added item posting.
6. In the **Contractor** field, click the drop-down arrow and select the contractor that performed the work for this item posting. (Keep the default value)
7. In the **Quantity Posted** field, enter the quantity of the item installed by the contractor on this date. **(0.250)**
8. In the **Location** field, enter the location for the DWR item posting. (**Pavement widening on SR 93**)
9. In the **Station From** field, enter the beginning station for the item posting.
10. In the **Station From Plus** field, enter the distance from the beginning station for the item posting.
11. In the **Offset Type** field, enter the offset type for the beginning station for the item posting.
12. In the **Offset Distance** field, enter the offset distance for the beginning station for the item posting.
13. In the **Station To** field, enter the ending station for the item posting.
14. In the **Station To Plus** field, enter the distance from the ending station for the item posting.
15. In the **Offset Type** field, enter the offset type for the ending station for the item posting.
16. In the **Offset Distance** field, enter the offset distance for the ending station for the item posting.

17. The **Attention** field indicates the number of attention flags recorded for this entity.
18. In the **Attachments** field, view the number of attachments associated with the record.
19. The **Units** field indicates the type of measurement used to determine the quantity of the reference item.
20. In the **Agency Views** field, view the number of agency views associated to the record.
21. Click the **Measured** check box if the item quantity installed is measured, or leave the box unchecked if the installed quantity is interim.
22. In the **Material Set** field, click the drop-down arrow and select the material set associated with the item, if appropriate.
23. In the **Plan Sheet Page Number** field, enter the number of the plan sheet page on which this work item is found.
24. In the **As Built Quantity** field, enter the placed quantity when the item is complete.
25. In the **Comments** field, enter any additional information about the item posting.
26. In the **Location** section, enter spatial coordinate information, as needed.
27. Click the **Save** button.
28. Repeat these steps until each pay item that has been added has the necessary information. **(For training, enter all rows listed in the table below.** You will get a warning; this will allow you to see an overrun exception on the payment estimate.)

Ln Num	Proj Ln Num	Item/Description	Posted Qty	Location
0105	0070	0285701-OPTION BASE, GROUP 01	1540	Pavement widening on SR 93
0300	0175	0711 11123 THERMOPLASTIC, STANDARD, WHITE, SOLID, 12" FOR CROSSWALK AND ROUNDABOUT	3000	Pavement widening on SR 93

Table 2. Training-Only Data for Construction

Recording Information Using DWR Agency Views

Agency views can be used to record additional item posting usage data on a Daily Work Report. Agency views are developed by the agency, and each has unique fields and attributes. Your system administrator can create agency views to meet the specific business needs or workflow required by FDOT. Data in associated agency views can be entered and modified only when the contract is active and the DWR is in *Draft* status.

Note: In the Appendix, refer to the *Associating a DWR agency view to a Contract Item* section if needed. This association is projected to have occurred at the time of contract activation.

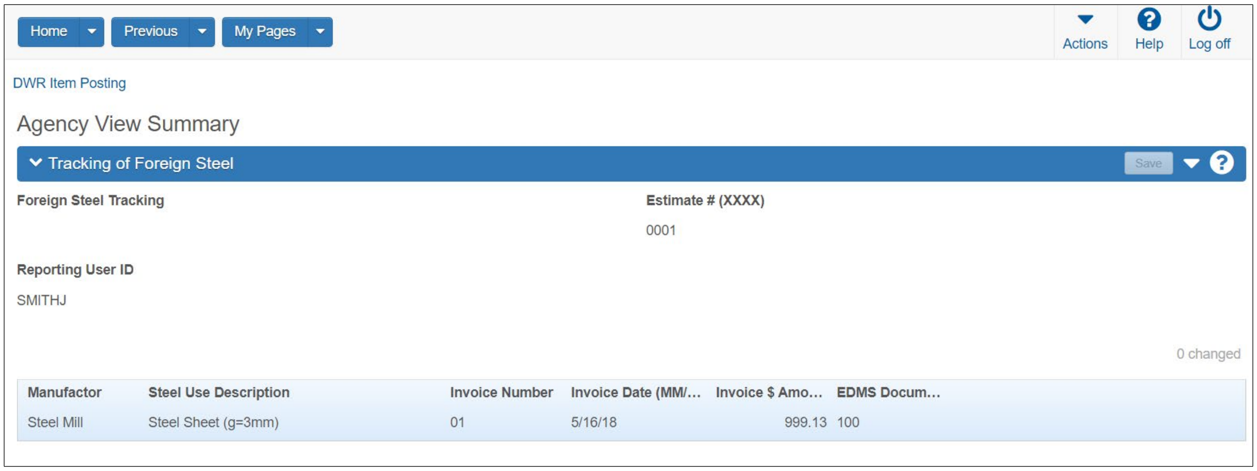


Figure 85. DWR Agency View

Instructions 88 - Outside of Training Only

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary > Add Pay Items tab

To record information in an agency view for a pay item:

1. On the **Add Pay Items** tab of the DWR, click the **Select Items…** button.
2. Search for and select the contract line number to add to the DWR.
3. Click the **Save** button.
4. Click the expand arrow for the item to which to record agency view information.

   Note the Agency Views field indicating whether agency views are associated to the item and whether one of the agency views is required.

5. In the **Contractor** field, click the drop-down arrow and select the contractor that performed the work for this item posting.
6. In the **Location** field, enter the location where the work was performed for the DWR item posting.
7. Click **Save**.

8. For the appropriate item posting, click the row **Actions** button.
9. From the **Views** section, select the appropriate DWR agency view.
10. Enter the appropriate information in the agency view fields.
11. Click the **Save** button.
12. Click the **DWR Item Posting** quick link.
13. Click the **Contract Daily Work Reports** quick link.

Instructions 89 – Outside of Training Only

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary

To add a DWR on a contract for which DWRs are currently listed:

1. On an existing DWR, from the **Contract Daily Work Report Summary**, click the component **Actions** button, and select the **Add New** action.

   Alternately, from the **Contract Progress Summary**, on the **Daily Work Reports** tab, click the **Add** button.
2. Enter the general information for the DWR, as shown previously.
3. Click the **Save** button.

Copying a Daily Work Report

If you are adding a DWR that is similar to another DWR already in the system, you can save the time it would take to enter all the DWR information by creating a copy of the existing DWR and then making any minor changes required.

Required fields are:

- DWR Date
- Inspector

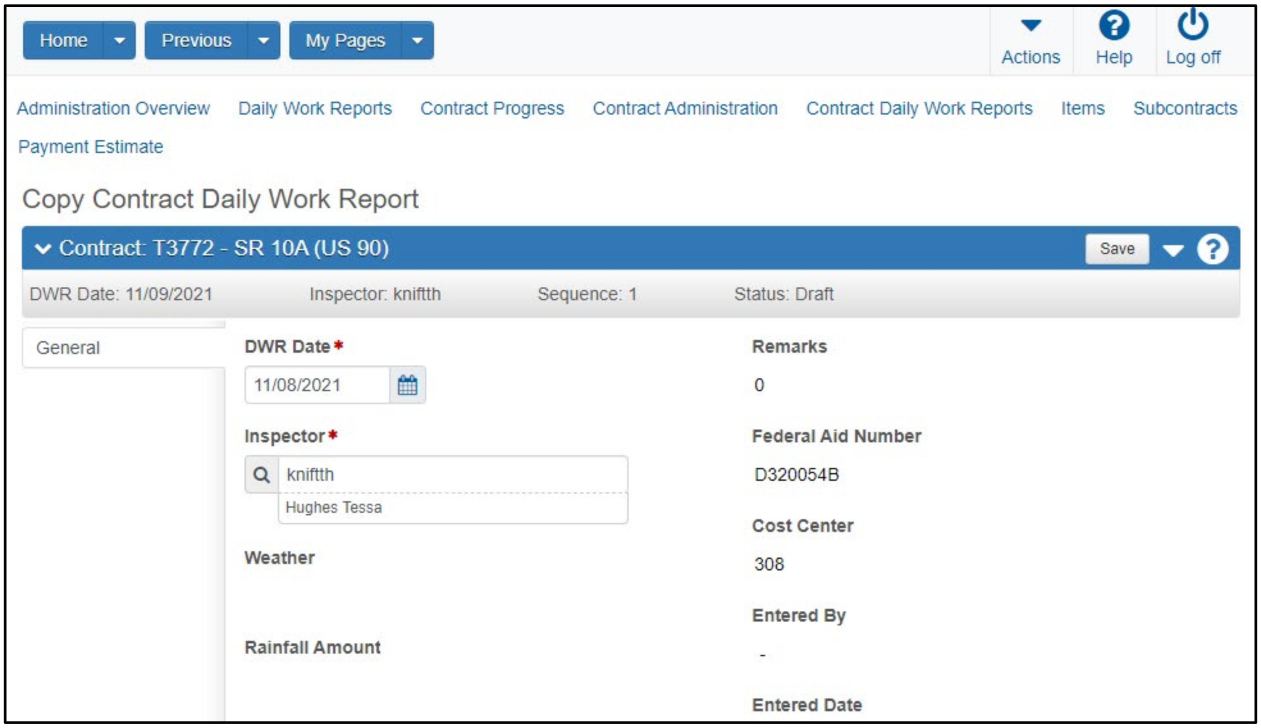


Figure 86. Copying a Daily Work Report

Instructions 90

Navigation: Construction > Daily Work Reports by Contract

To copy a DWR on a contract:

1. Click the **Home** button.
2. Click the **Daily Work Reports** link under the **Construction** component.

   Alternately, click the Home button and from the Construction component, select the Daily Work Reports by Contract link.

3. In the Quick Find search box, search for the contract ID. **(TRNXX,** where XX is your assigned contract number**)**
4. Click the row **Actions** button, and select the **Copy** action.
5. Enter the information for the DWR.

   Date: **Yesterday's Date**

   Inspector: Note that your user ID has been recorded as the inspector associated with this DWR

6. Click the **Save** button.

Approving and Rejecting DWRs

Submitting a DWR for Approval

Once a DWR is complete, you can submit it for approval. To submit a DWR for approval, it must have a status of Draft. The system will change the DWR status to Pending Approval.

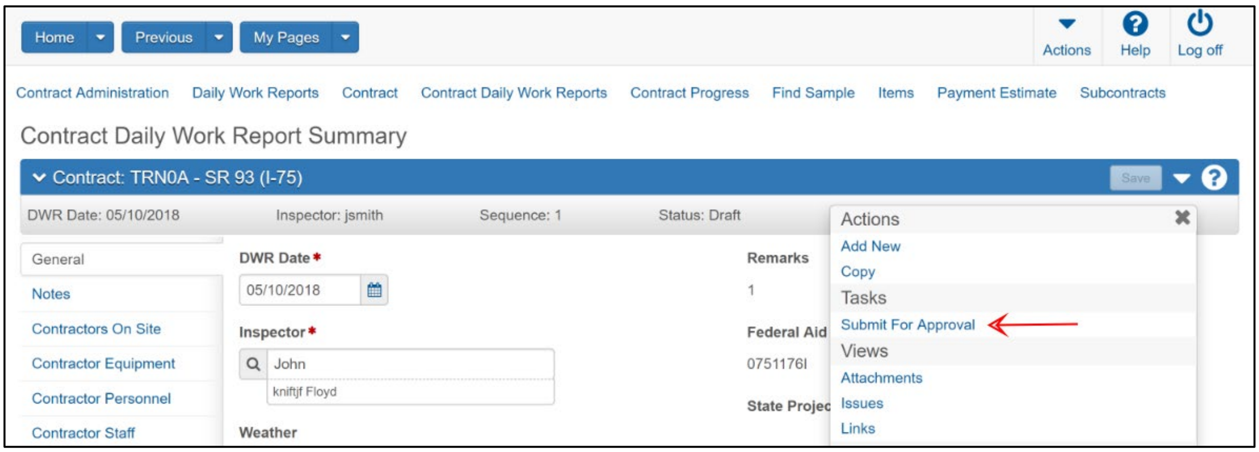


Figure 87. Contract Daily Work Report Summary – Submit For Approval Task

Instructions 91

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary > General tab

To submit a DWR for approval:

1. Click the **Daily Work Reports** quick link.
2. In the Quick Find search box, search for the contract ID. **(TRNXX,** where XX is your assigned contract number**)**
3. Expand the row.
4. Locate and open the appropriate DWR. **(Today's Date)**
5. Click the component **Actions** button, and select the **Submit for Approval** task.

   Note the DWR Status is now Pending Approval.

6. Click the **Daily Work Reports** quick link.
7. In the Quick Find search box, search for the contract ID. **(TRNXX,** where XX is your assigned contract number**)**
8. Expand the row.
9. Locate the appropriate DWR, then click the row **Actions** button. **(Yesterday's Date)**
10. Select the **Submit for Approval** task.

    Note the DWR Status is now Pending Approval.

Approving a DWR

Depending on FDOT policies and system configurations, a DWR can be approved or rejected from either the DWR component or the Daily Diary component.

Figure 88. Contract Daily Work Report Summary – Approve Task

Instructions 92

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary

To approve a DWR:

1. Click the **Home** drop-down arrow and verify the correct role is selected. (**PrCLDInspector**)
2. Navigate to the DWR to be approved. (Contract: **TRNXX,** DWR Date: **Today's Date**)
3. Click the component **Actions** button and select the **Approve** task.

   The system updated the status to Approved.

Rejecting a DWR

If a DWR has been approved and needs to be corrected, you can reject the DWR.

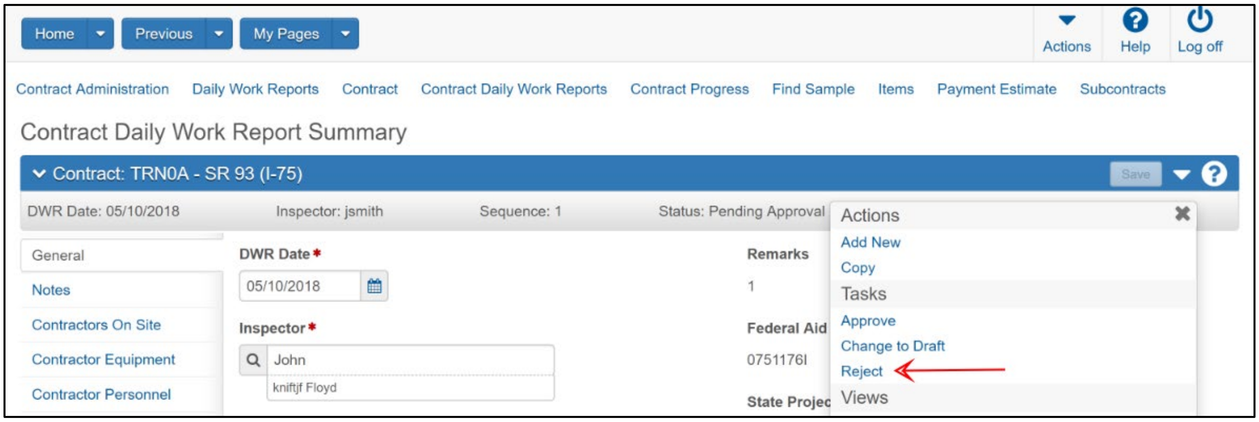


Figure 89. Contract Daily Work Report Summary – Reject Task

Instructions 93

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary

To reject an approved DWR:

1. Click the **Daily Work Reports** quick link at top of page.
2. Search for and select the **DWR Date** link for DWR to be approved. **(Yesterday's Date)**
3. Click the component **Actions** button, and select the **Reject** task.

   The system updated the status to Rejected.

Returning a Rejected DWR to Draft Status

If a DWR has been rejected and needs to be corrected, you can return the DWR to Draft status. This option is available only when the DWR has a status of Rejected or Pending Approval.

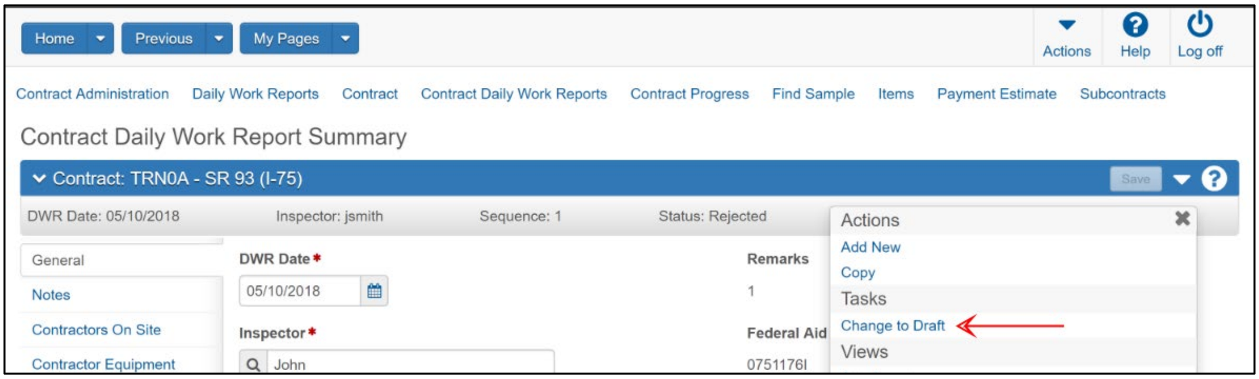


Figure 90. Contract Daily Work Report Summary – Change to Draft Task

Instructions 94

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary

To return a rejected DWR to Draft status, update the DWR, and resubmit for approval:

1. Click the **Home** drop-down arrow and verify the correct role is selected. (**PrCInspector**)
2. Navigate to the appropriate DWR. (Contract: **TRNXX,** DWR Date: **Yesterday's Date**)
3. Click the component **Actions** button and select the **Change to Draft** task.

   The system updated the status to Draft.
4. Update the DWR as needed.
5. Click the **Save** button.
6. Click the component **Actions** button, and select the **Submit For Approval** task.

Generating DWR Reports

The DWR Report contains all the general information recorded in a single daily work report, including items, and quantities. Subreports can optionally be generated for remarks; contract times; contractor staff, personnel, and equipment; agency staff; and attachments in the DWR.

You can generate reports for multiple DWRs created by multiple inspectors for different date ranges. When multiple reports are generated, each DWR is separated by a page break.

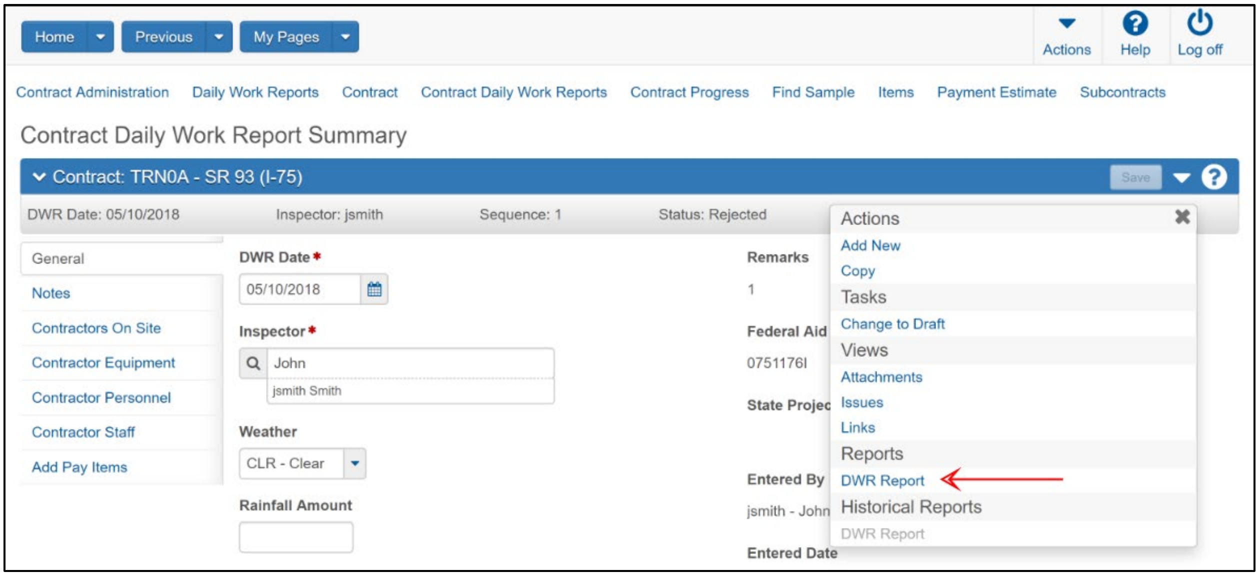


Figure 91. Contract Daily Work Report Summary – DWR Report

Instructions 95

Navigation: Construction > Daily Work Reports > Contract Daily Work Report Summary

To view reports for Daily Work Reports:

1. Click the **Daily Work Reports** quick link at top of page.
2. Search for and select the **DWR Date** link for DWR to open. (Contract: **TRNXX,** DWR Date: **Today's Date**)
3. Click the component **Actions** button.
4. In the **Reports** section, select the **DWR Report** option.
5. Click the **Show Remarks** check box to display the subreport for Remarks.
6. Click the **Show Contract Times** check box to display the subreport for Contract Time.
7. Click the **Show Contractor Staff** check box to display the subreport for Contractor Staff.

8. Click the **Show Contractor Personnel** check box to display the subreport for Contractor Personnel.
9. Click the **Show Contractor Equipment** check box to display the subreport for Contractor Equipment.
10. Click the **Show Agency Staff** check box to display the subreport to Agency Staff.
11. Click the **Show Attachments** check box to display the subreport for Attachments.
12. Click the **Execute** button.
13. Review the generated **DWR Report**.
14. Close the browser tab containing the report.
15. Click the **Home** button.

Daily Diaries

Managing Daily Diaries

A Daily Diary is a collection of all the Daily Work Reports (DWRs) submitted on one day by all inspectors working on a contract. The project manager usually submits one daily diary per day per contract. In the daily diary, the project manager authorizes the DWRs and records the time charge information for the day. The system does not allow more than one diary to be created per day per contract, and a diary may not be created for a future date. Diaries can be created for days when no DWRs are collected.

Please note that depending on the roles you are assigned, you may not have access to all the functionality shown in this training guide.

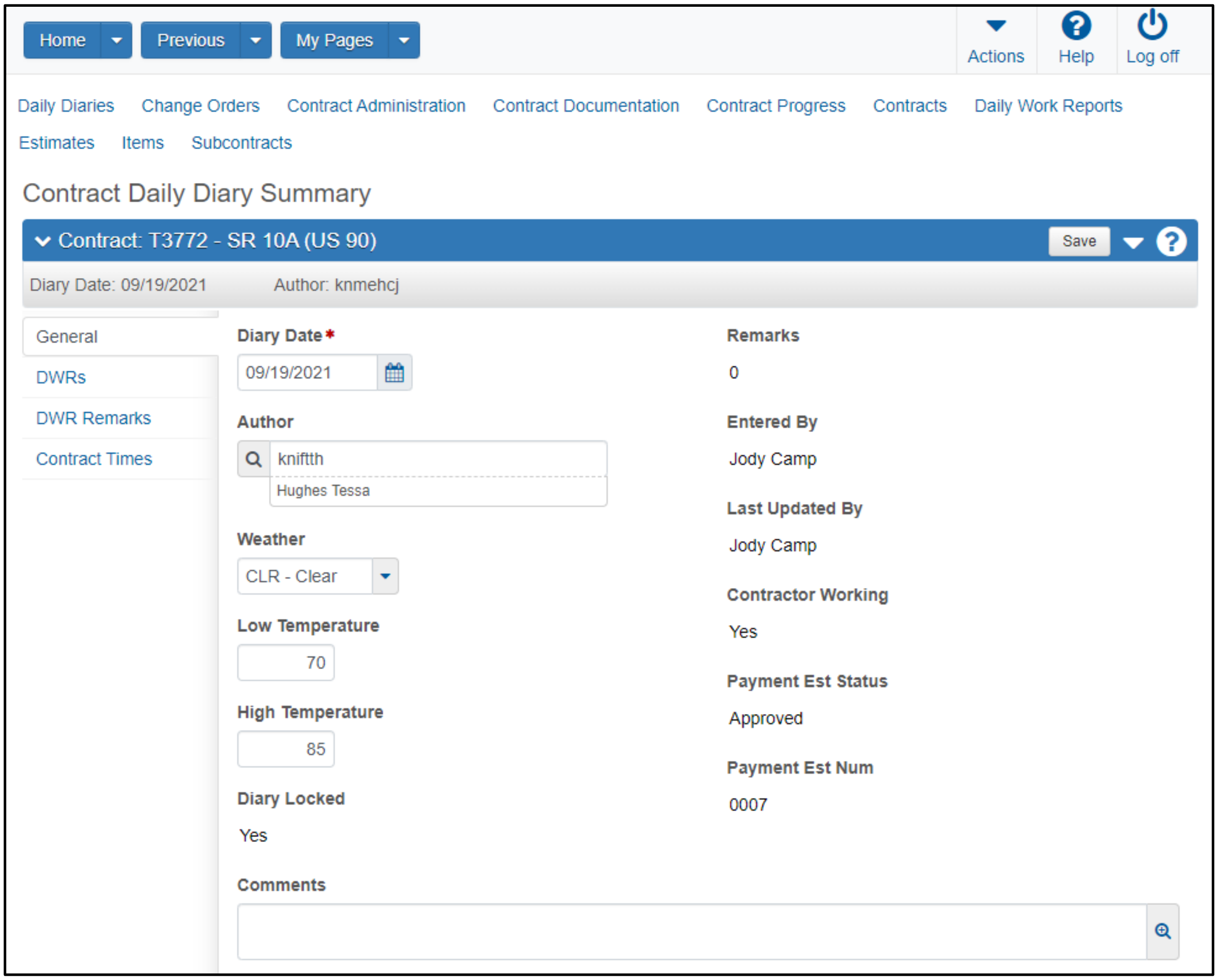


Figure 92. Contract Daily Diary Summary

Adding a Daily Diary

Information about the diary is contained in two components. The upper part of the page contains the Daily Diary component, which displays general information about the diary. On this component, you can view but not change diary information. The lower part of the page contains the Daily Diary Summary component, which allows you to add information about the diary.

Required fields are:

- Diary Date

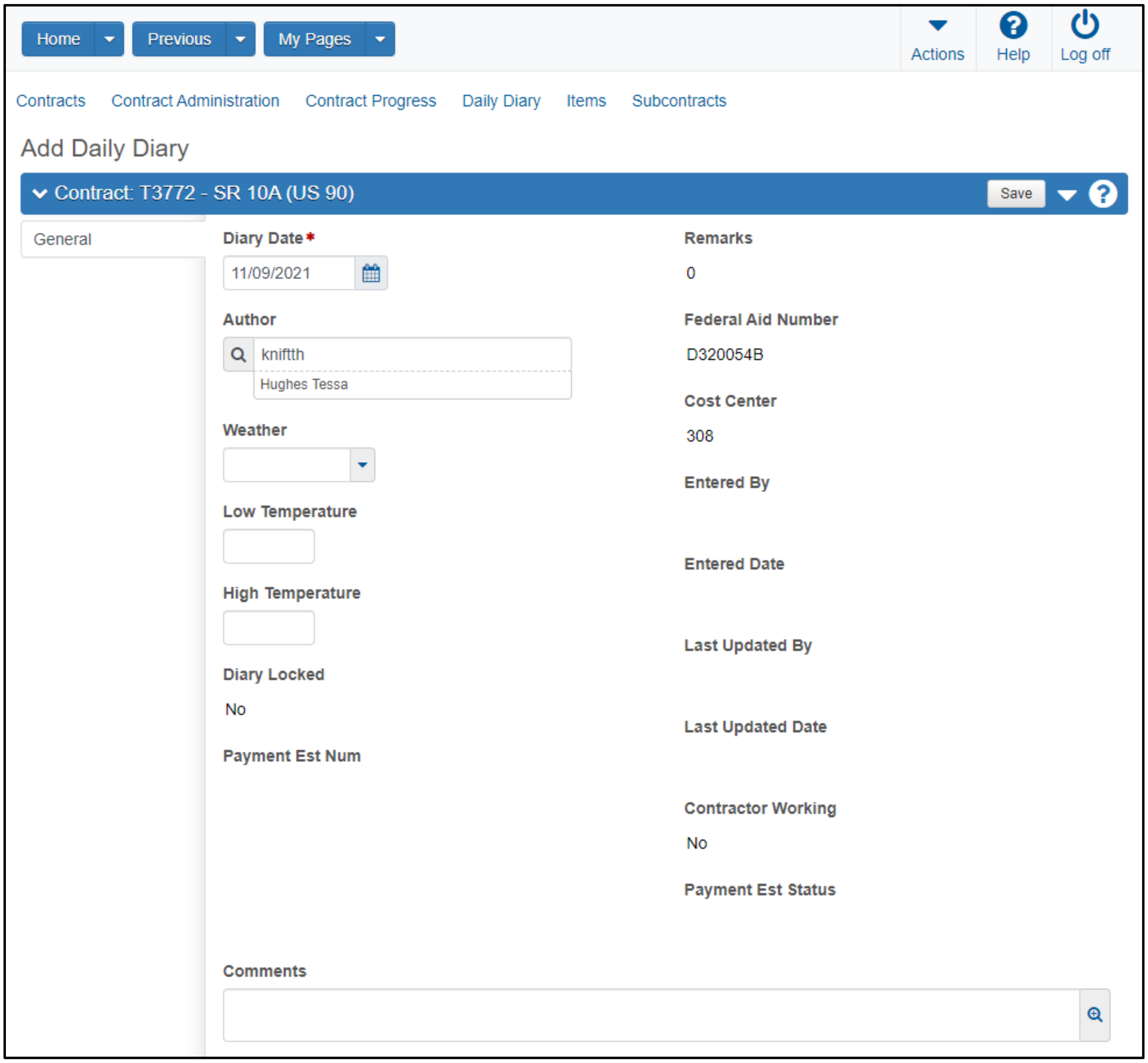


Figure 93. Contract Daily Dairy – Adding a Daily Diary

Instructions 96

Navigation: Construction > Daily Diary

To add a Daily Diary:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCRPA)**
2. From the **Construction** component, click the **Daily Diary** link.
3. Click the component **Actions** button, and choose the **Select Contract to Add Daily Diary** action.
4. Search for and select the contract to which to add a Daily Diary. **(TRNXX,** where XX is your assigned contract number**)**
5. Click the **Create Daily Diary on Contract** button.
6. In the **Diary Date** field, enter the date documented by the diary. **(Today's Date)**
7. In the **Author** field, note that your user ID has been recorded as the author associated with this daily diary.
8. In the **Weather** field, click the drop-down arrow and select the weather condition for the diary date. **(Skip – Entered in next exercise)**
9. In the **Low Temperature** field, enter the low temperature recorded for the diary date. **(Skip – Entered in next exercise)**
10. In the **High Temperature** field, enter the high temperature recorded for the diary date. **(Skip – Entered in next exercise)**
11. Click the **Save** button.
12. The **Diary Locked** field indicates whether the diary is read-only or can be changed.
13. In the **Comments** field, enter any additional information about the record.
14. The **Remarks** field indicates the number of remarks.
15. The **Entered By** field indicates the user ID and name of the person that created the daily diary.
16. The **Last Updated By** field indicates the name of the person who most recently changed the record.
17. The **Contractor Working** field indicates whether the contractor was working on the diary date.

18. The **Payment Est Status** field indicates the status of the payment estimate.

19. The **Payment Est Num** field shows the contractor payment estimate number when it is created.

20. In the **Remarks** section, in the **Remarks Type** field, click the drop-down arrow and select the remark type. **(GEN – General)**

21. In the **Remark** field, enter a remark for the diary date. **(First Daily Diary)**

22. Click the **Save** button.

Populating DWR Weather in a Daily Diary

The Contract Daily Diary Summary contains all the information currently recorded in the daily diary. You can automatically record weather information from the DWRs associated to the daily diary. The system enters the lowest DWR temperature in the Low Temperature field and the highest DWR temperature in the High Temperature field.

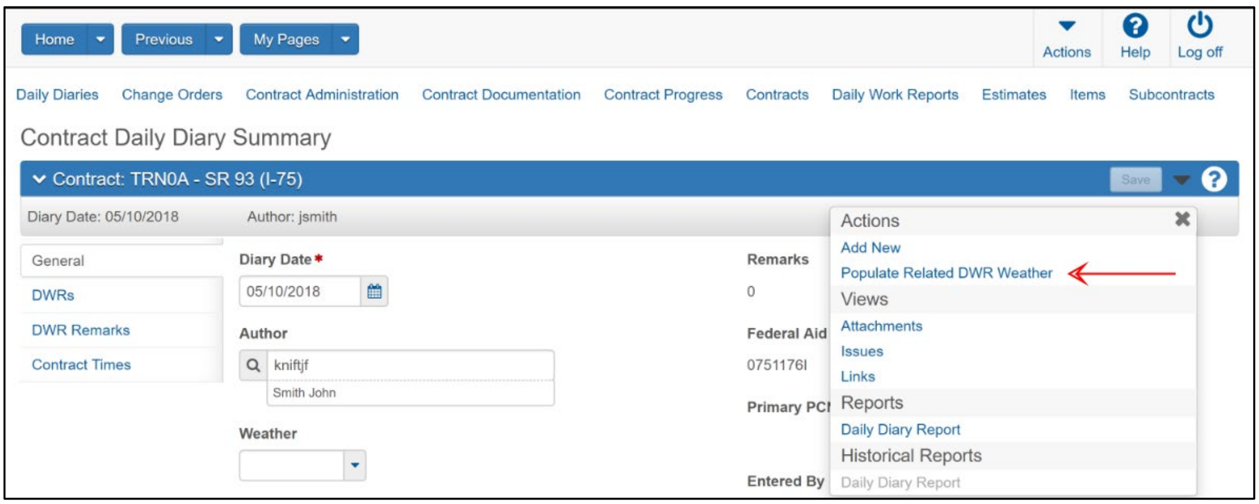


Figure 94. Maintaining a Daily Diary

Instructions 97

Navigation: Construction > Contract Daily Diary Summary

To add weather information from the DWRs in a Daily Diary:

1. Click the component **Actions** button, and select the **Populate Related DWR Weather** action.

   Note that the Weather, Low Temperature, and High Temperature fields are populated with information from the associated DWRs.

Managing and Approving DWRs in a Daily Diary

The DWRs tab on the Contract Daily Diary Summary component contains a list of all the daily work reports currently included in the daily diary.

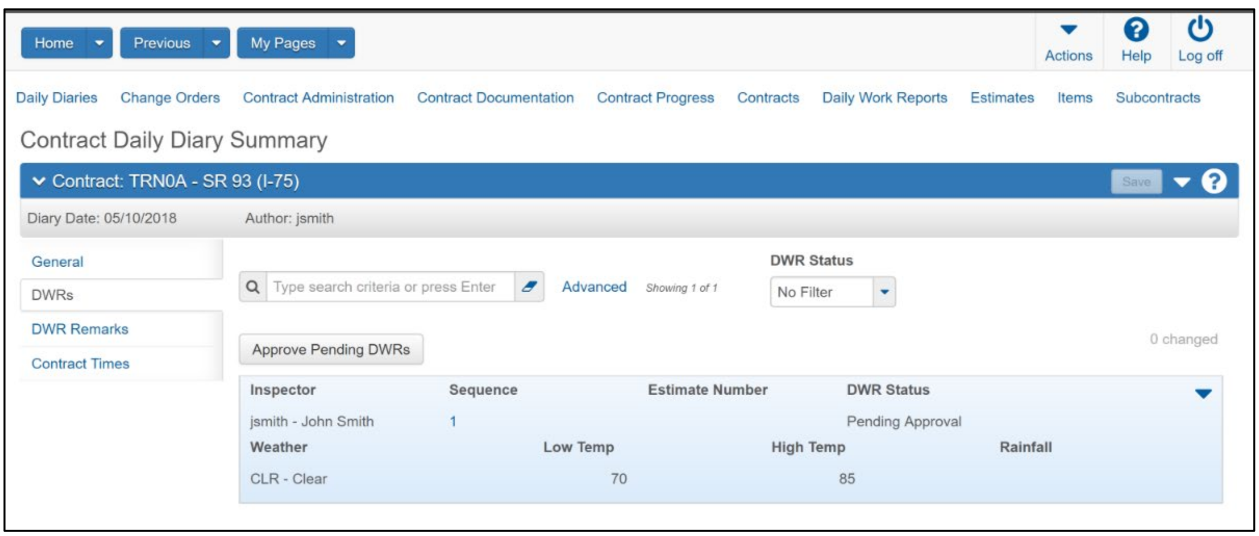


Figure 95. Contract Daily Diary Summary – DWRs tab

Instructions 98

Navigation: Construction > Contract Daily Diary Summary > DWRs tab

To view or modify the DWRs in a Daily Diary:

1. Click the **DWRs** tab.
2. View the associated DWRs.

Approving DWRs in a Diary

You can approve a single DWR, or all of the DWRs in a diary with a status of Pending Approval.

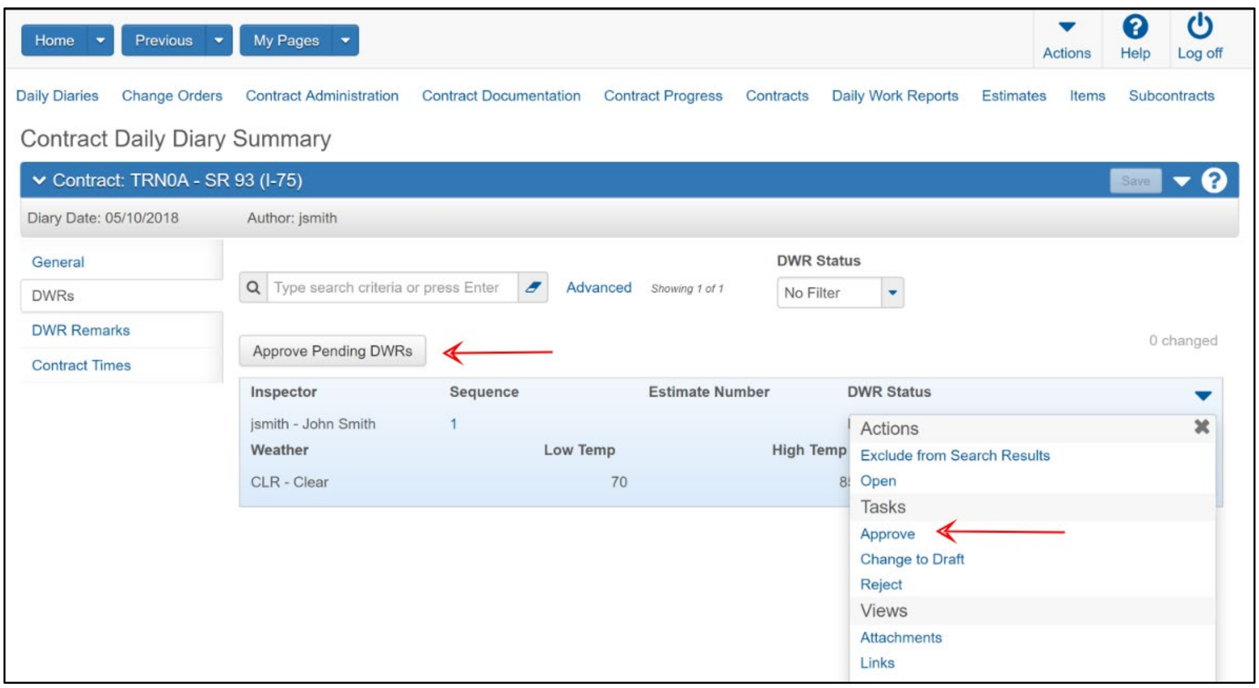


Figure 96. Contract Daily Diary Summary – Approving DWRs

Instructions 99

Navigation: Construction > Contract Daily Diary Summary

To approve pending DWRs in a Daily Diary:

1. Click the **DWRs** tab.
2. To approve individual DWRs in a Daily Diary, click the DWR row **Actions** button, and select the **Approve** task. **(Skip)**
3. To approve all pending DWRs in a Daily Diary, click the **Actions** button above the list of DWRs, and select **Approve Pending DWRs**. **(Skip)**
4. View the **DWR Status** field.

Maintaining DWR Remarks in a Daily Diary

The DWR Remarks tab on the Contract Daily Diary Summary allows you to add and maintain the DWR remarks you want to include in the daily diary. DWR remarks are organized by DWR in accordion rows.

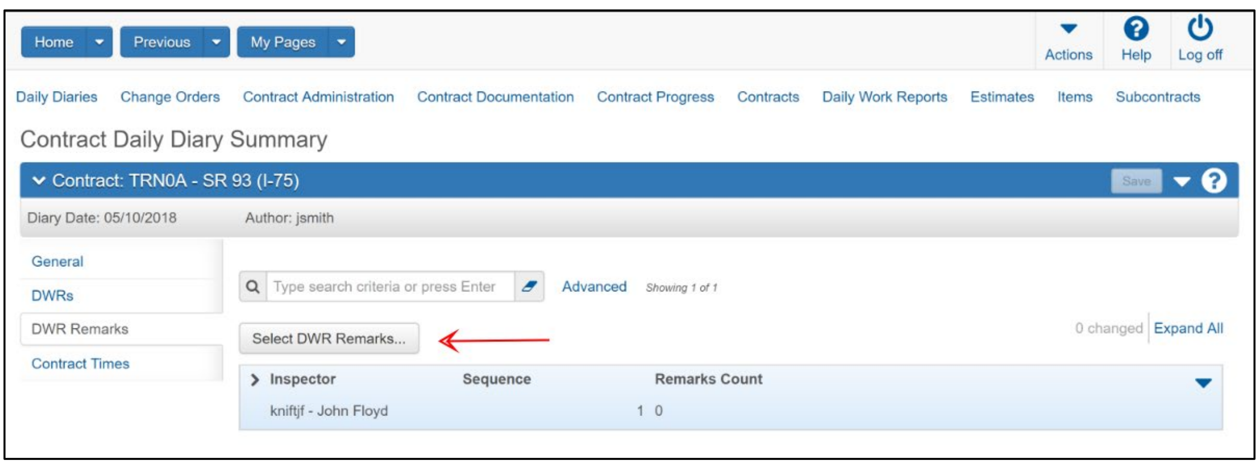


Figure 97. Contract Daily Diary Summary – DWR Remarks tab

Instructions 100

Navigation: Construction > Contract Daily Diary Summary > DWR Remarks tab

To add or modify remarks in a Daily Diary:

1. Click the **DWR Remarks** tab.
2. Click the **Select DWR Remarks…** button.
3. Search for and select the remark(s) to add. (Select Remark Type: **CITW – Controlling Items of Work**)
4. Click the **Add DWR Remarks to Daily Diary** button.

Recording Time Information in a Daily Diary

Contract times are records of time-related information important to the contract. You can add or change contract time charge information on the daily diary.

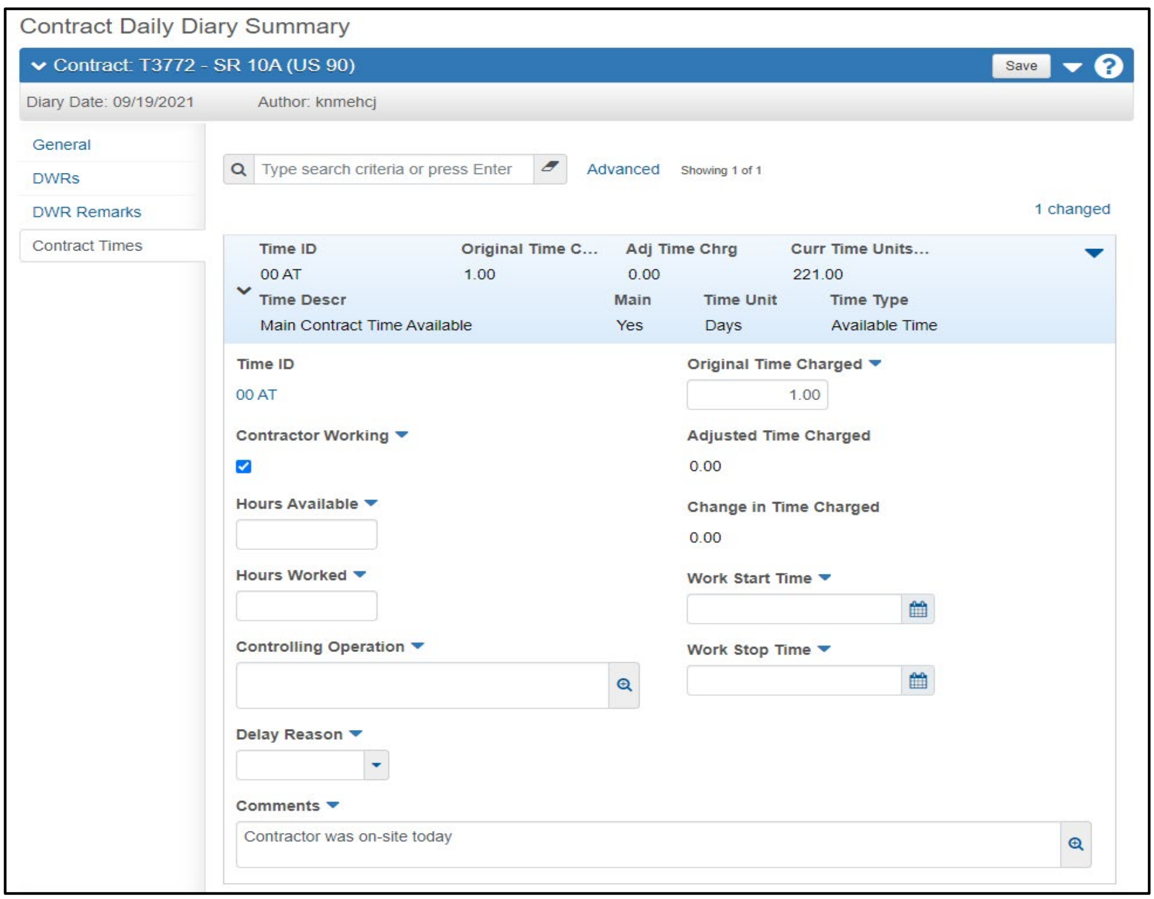


Figure 98. Contract Daily Diary Summary – Contract Times tab

Instructions 101

Navigation: Construction > Contract Daily Diary Summary > Contract Times tab

To add or modify contract time charge information in a Daily Diary:

1. Click the **Contract Times** tab.
2. Click the **Contractor Working** check box to indicate whether the contractor was working on the diary date. **(Select the check box)**
3. In the **Hours Available** field, enter the number of time units available for the contractor to work for the date. **(Skip; this is recorded on the DWR)**
4. In the **Hours Worked** field, enter the number of time units the contractor worked for the date. **(Skip; this is recorded on the DWR)**
5. In the **Controlling Operation** field, enter the primary type of work related to the time charge for the date. **(Skip; this is recorded on the DWR)**
6. In the **Delay Reason** field, enter the description of circumstances or events impeding progress of work related to the contract time for the date.
7. In the **Original Time Charged** field, enter the number of time units charged for the date, if this is an available time contract. **(1.00)**
8. The **Adjusted Time Charged** field indicates the total number of time units charged, including adjustments.
9. The **Change in Time Charged** field indicates the adjusted time charged minus the original time charged in a daily diary.
10. In the **Work Start Time** field, enter the date and time of day the contractor began work.
11. In the **Work Stop Time** field, enter the date and time of day the contractor stopped work.
12. In the **Comments** field, enter additional information for the diary contract time. **(Contractor was on-site today)**
13. Click the **Save** button.

Rejecting a DWR in a Diary

If a DWR has been approved and needs to be corrected, you can reject the DWR in the Diary.

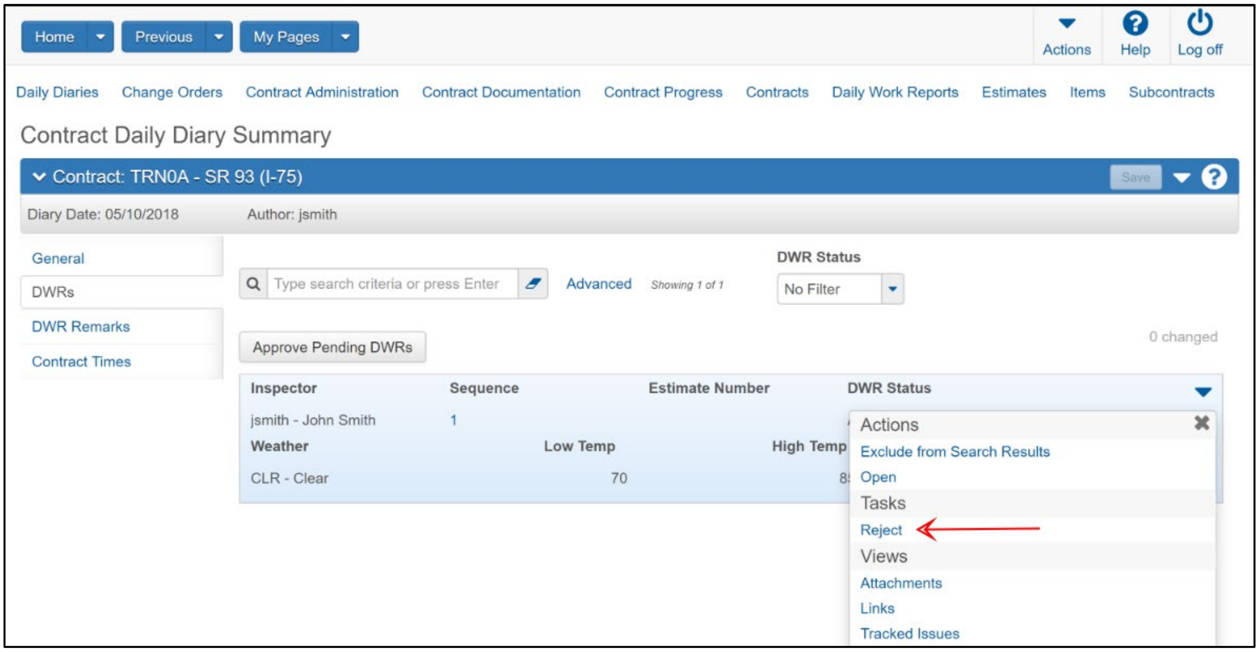


Figure 99. Contract Daily Diary Summary – Rejecting a DWR in a Diary

Instructions 102 – Training Only

Navigation: Construction > Contract Daily Diary Summary

To create an additional diary with an approved DWR:

1. Click the component Actions button and select the **Add New** action.
2. In the **Diary Date** field, enter the date documented by the diary. **(Yesterday's Date)**
3. Click the **Save** button.
4. Click the **DWRs** tab.
5. To approve individual DWRs in a Daily Diary, click the DWR row **Actions** button, and select the **Approve** task. (Skip)
6. To approve all pending DWRs in a Daily Diary, click the **Actions** button above the list of DWRs, and select **Approve Pending DWRs**. **(Approve all pending DWRs)**

Instructions 103

Navigation: Construction > Contract Daily Diary Summary

To reject an approved DWR in a daily diary:

1. From the **DWRs** tab, click the DWR row **Actions** button, and select the **Reject** task.
2. View the **DWR Status** field.

Instructions 104 – Training Only

Navigation: Construction > Contract Daily Diary Summary

To change the status of a rejected DWR to Draft to cause an exception on the payment estimate:

1. From the DWRs tab, click the DWR row **Actions** button, and select the **Change to Draft** task.
2. View the **DWR Status** field.

Daily Diary Report

The Daily Diary Report lists information from one or more selected daily diaries, including the date, weather, and location, and the name of the prime contractor and whether or not the contractor worked on that day. The report also provides totals for contract time, which varies depending on whether the main contract time is Available Time, Calendar Time, or Completion Date.

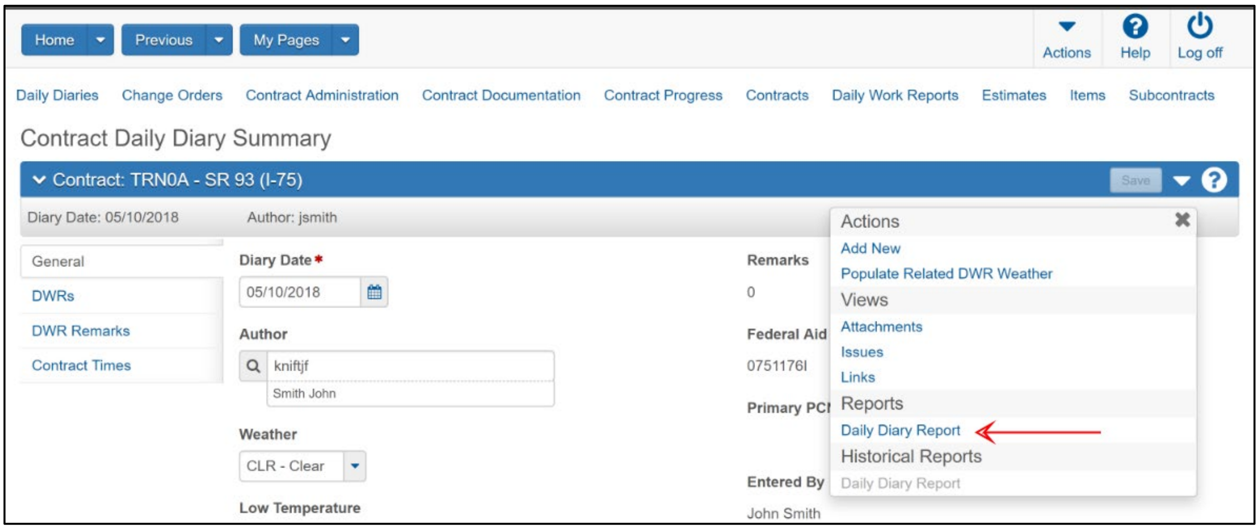


Figure 100. Contract Daily Diary Summary – Daily Diary Report

Instructions 105

Navigation: Construction > Daily Diary Summary

To process a report for a Daily Diary:

1. Click the component **Actions** button, and from the **Reports** section, select the **Daily Diary Report**.
2. Select the **Output Type**. (Keep default)
3. Select the **Report Layout Source**. (Keep default)
4. Click the **Execute** button.
5. View generated report.
6. Close the browser tab containing the report.
7. Click the **Home** button.

Maintaining Weekly Time Charge Reports for a Contract

The Weekly Report of Time Charges tab on the Contract Progress Summary lists records of weekly reports generated for different contract times.

Required fields are:

- Week Ending
- Contract Time

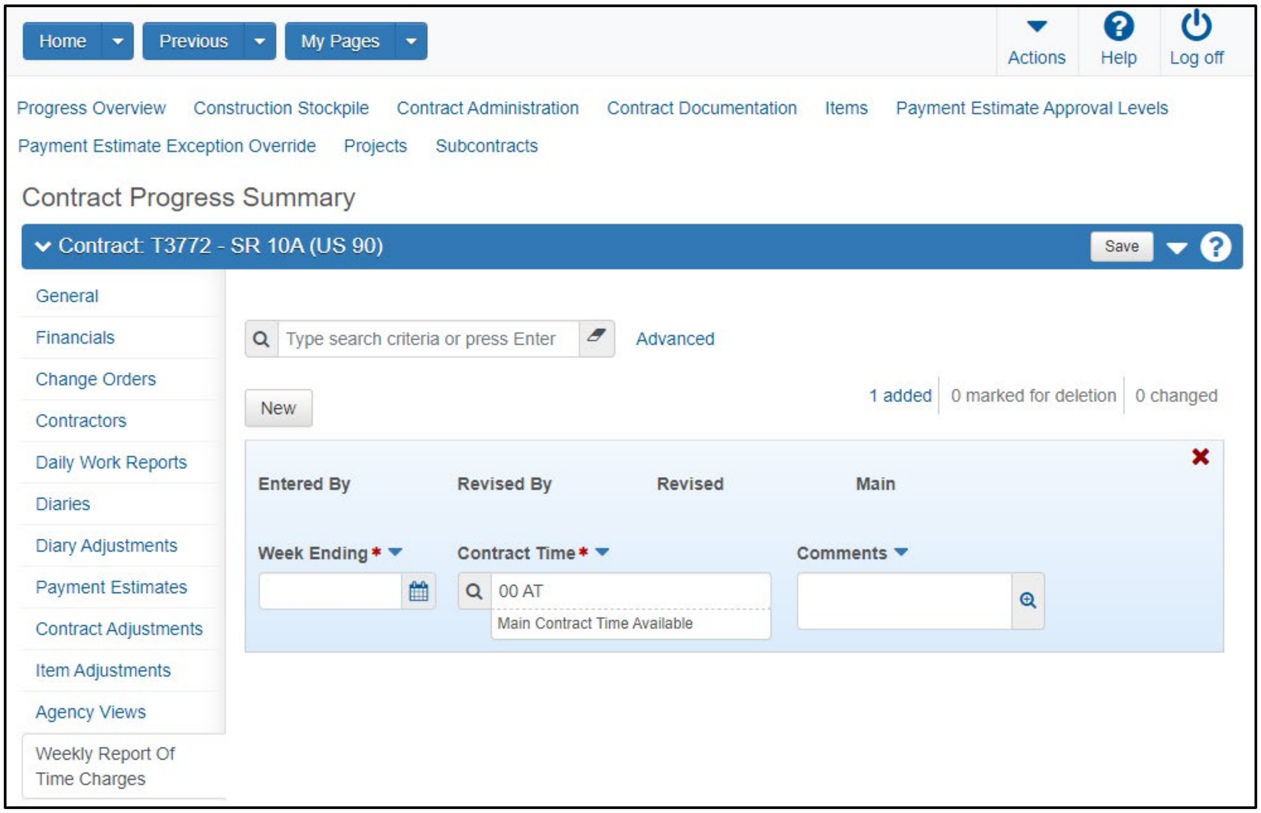


Figure 101. Contract Progress – Weekly Report Of Time Charges tab

Instructions 106

Navigation: Construction > Contract Progress Summary > Weekly Report Of Time Charges tab

To generate a weekly report of time charges:

1. Click the **Contract Progress** link under the **Construction** component.
2. Search for and open the appropriate contract. **(TRNXX,** where XX is your assigned contract number**)**
3. Click the **Weekly Report Of Time Charges** tab.
4. Click the **New** button.
5. In the **Week Ending** field, enter the date for the Saturday at the end of the week included in the report. **(Friday's Date for Current Week**)
6. In the **Contract Time** field, search for and select the contract time to be included in the report. **(00 AT – Contract Time**)
7. In the **Comments** field, enter additional information about the record.
8. Click the **Save** button.
9. Click the row **Actions** menu.
10. Click the **Weekly Report of Time Charges** link in the **Historical Reports** section.
11. View report.
12. Click the **Home** button.

Payment Estimates

Managing Payment Estimates

A payment estimate is an estimated payment to the contractor for work performed on the contract. This can include a percentage of the total contract amount, a percentage of the total for a contract project, or payment for individual work items on the contract. The Contract Payment Estimate Overview lists all the contract payment estimates recorded in the system.

Please note that depending on the roles you are assigned, you may not have access to all the functionality shown in this training guide. FDOT has determined the payment estimate types available for FDOT's contract types.

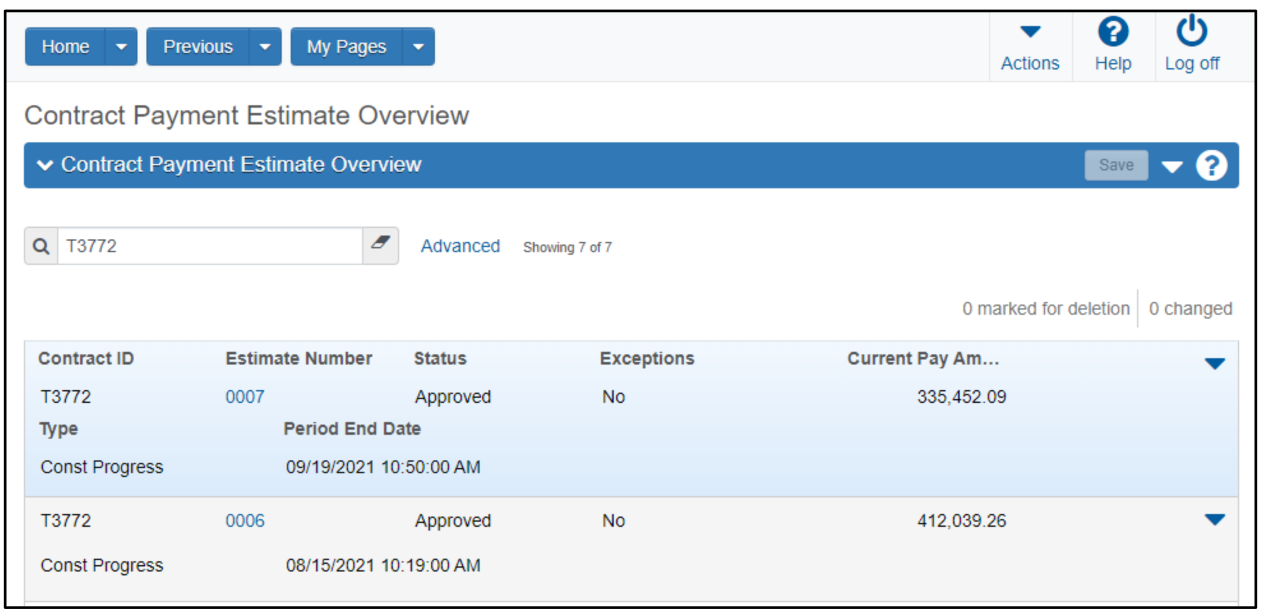


Figure 102. Managing Payment Estimates – Contract Payment Estimate Overview

Maintaining Contract Payment Estimate Approval Levels

A payment estimate on a contract must be approved by the agency at several stages in its development. Using reference data in conjunction with user roles, security groups, and contract authority, FDOT determines a default structure for which payment estimate types and how many levels of approval are required, at what stage each approval should take place, and the user that has authority to approve each estimate type at each approval level.

Payment estimate approval levels are copied to a contract record from reference data when a proposal is transitioned to Construction, or when a contract record is migrated from a client server application. If a contract needs a different approval structure, you can override these agency defaults by removing payment estimate approval types and/or changing the approval levels associated with an estimate type.

There are four payment estimate types in web-based AASHTOWare Project – Progress, Semi-Final, Supplemental, and Final. Each must be set with the appropriate levels of approval, and they must be different groups. When a contract is activated, the approval levels will be set to the system defaults. For Construction contracts, a progress estimate must have at least three approval levels and can have more as directed by district policy. In web-based AASHTOWare Project, even if you have multiple roles corresponding to multiple approval levels, you cannot approve a payment estimate at more than one level.

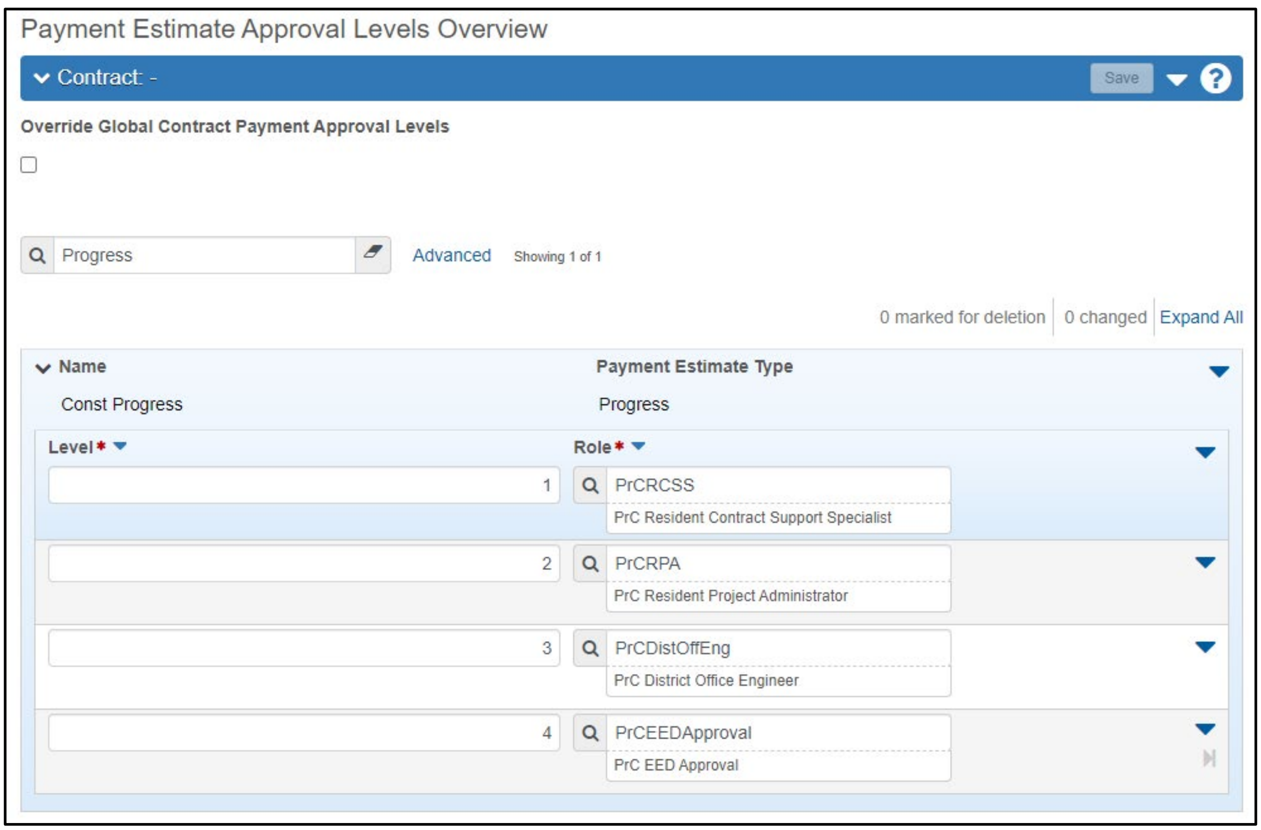


Figure 103. Payment Estimate Approval Levels Overview

Instructions 107

Navigation: Construction > Contract Progress > Payment Estimate Approval Levels

To maintain approval levels for payment estimates:

1. Click the **Home** drop-down arrow and verify the correct role is selected. (**PrCDistOffAdmin**)
2. From the **Construction** component, click the **Contract Progress** link.
3. Search for and select the contract. **(TRNXX,** where XX is your assigned contract number**)**
4. Click the **Payment Estimate Approval Levels** quick link at top of window.
5. Click the expand arrow next to the appropriate payment estimate **Name. (Const Progress)**
6. Select the **Delete** action from the row action menu for the appropriate level to delete. (Delete **Level 3 – PrCDistOffEng** and **Level 4 – PrCEEDApproval)**
7. Click the **Save** button.
8. Click the **Home** button.

Maintaining Payment Estimate Exceptions

The Payment Estimate Exception Overview lists all of the reference payment estimate exceptions in the system. Each exception row includes settings that define how the exception must be addressed before a payment estimate can be approved. These settings apply to all contracts, although they can be overridden with settings that apply only to an individual contract.

Adding a Contract Payment Estimate

You can add a payment estimate for an active contract after the Notice to Proceed contract time is complete. Keep in mind that a contract cannot be deleted nor the transition to construction reversed after a payment estimate is added to the contract. If the contract already includes other payment estimates, they must all be approved or deleted before another payment estimate is added.

Note: Final Estimates will be entered by the District Office Final Estimates staff in the district office or field office, as applicable.

Required fields are:

- Type
- Period End Date

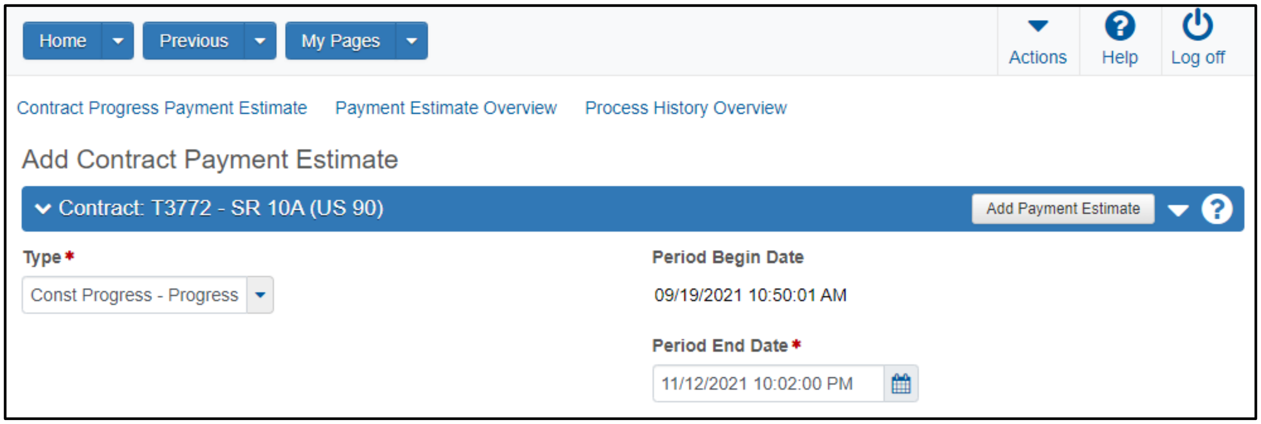


Figure 104. Add Contract Payment Estimate

Instructions 108

Navigation: Construction > Payment Estimates

To add a new payment estimate:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCRCSS)**
2. From the **Construction** component, click the **Payment Estimates** link.
3. Click the component **Actions** button, and select the **Select Contract to Add Payment Estimate…** action.
4. Search for and select the contract. **(TRNXX,** where XX is your assigned contract number**)**
5. Click the **Add Contract Payment Estimate on Contract** button.
6. In the **Type** field, click the drop-down arrow and select the type of payment estimate. **(Const Progress – Progress)**

   The type determines which roles can make approval decisions for this payment estimate.

7. In the **Period End Date** field, enter the date that marks the last day of the payment estimate period. **(Current Date and Time)**

8. Click the **Add Payment Estimate** button.

   A message will appear indicating the Add Payment Estimate Process has started.

9. Click the **Contract Progress Payment Estimate** quick link at top of window.

Maintaining a Contract Payment Estimate

The Payment Estimate Summary lists all of the information recorded for a contract payment estimate. The General tab lists read-only information about the contract payment estimate.

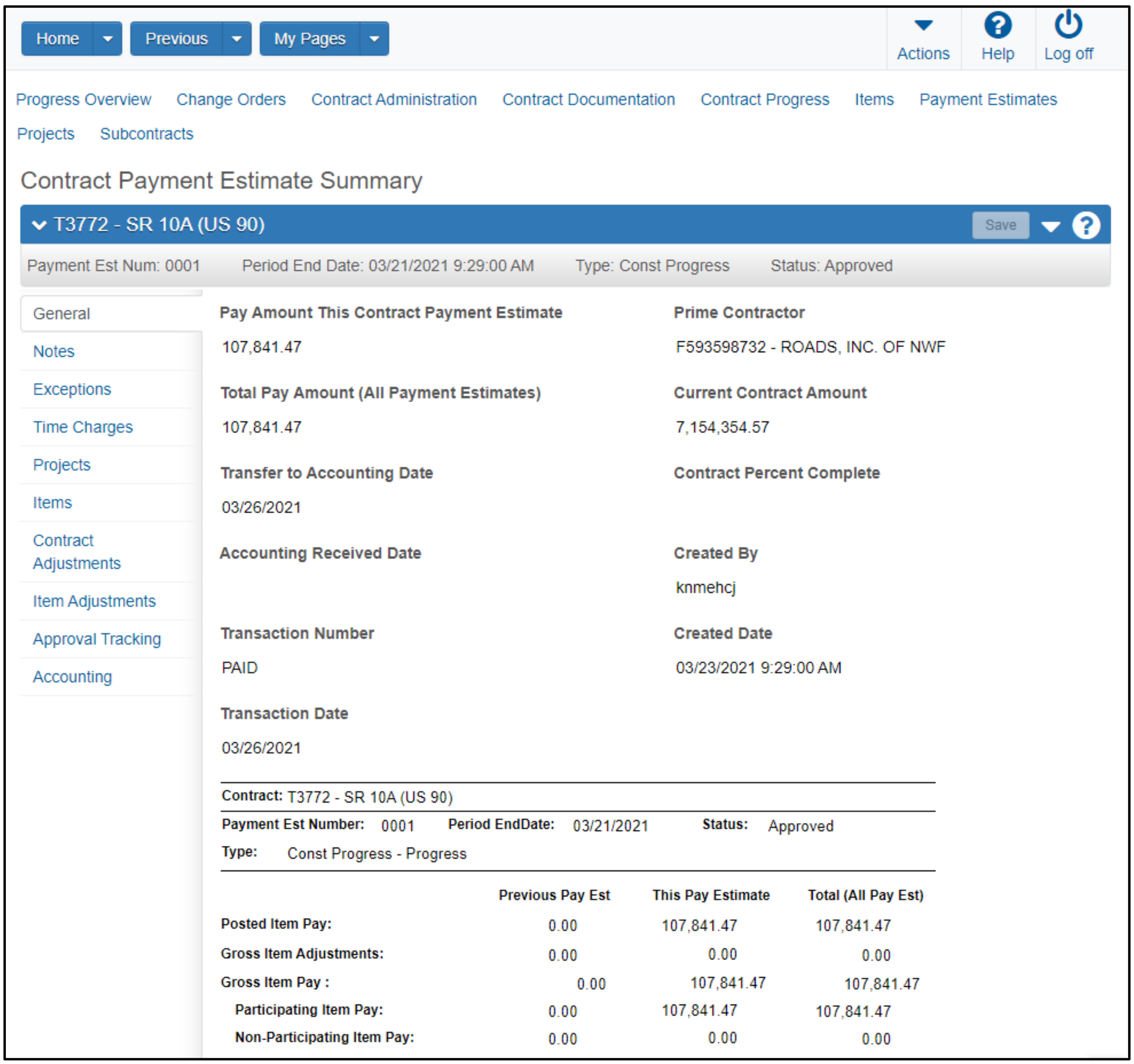


Figure 105. Contract Payment Estimate Summary – General tab

Instructions 109

Navigation: Construction > Contract Progress > Payment Estimates tab

To view and maintain a payment estimate:

1. On the **Contract Progress Summary** screen, click the **Payment Estimates** tab.
2. Click the **Number** link of the appropriate payment estimate. **(0001)**
3. View the payment estimate general information.

Maintaining Notes for a Payment Estimate

The Notes tab on the Contract Payment Estimate Summary contains a list of notes recorded for the payment estimate. You can only modify or delete a note that you create.

Required fields are:

- Payment Estimate Note

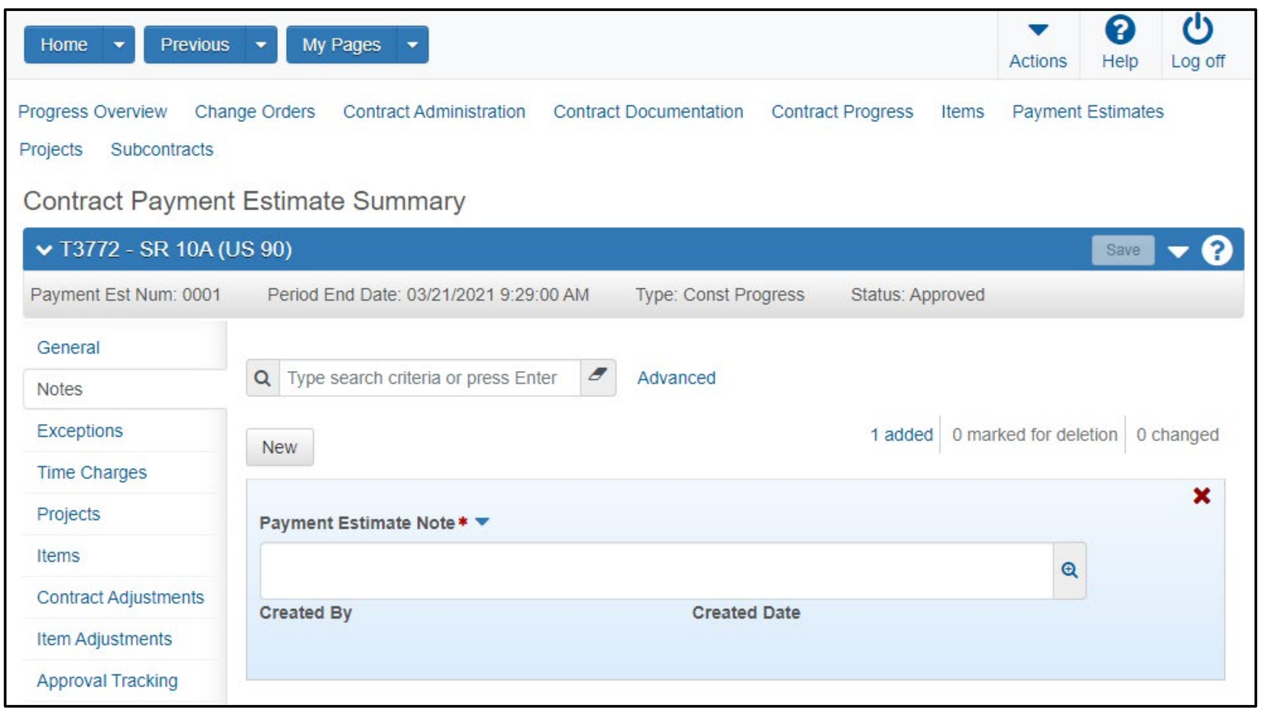


Figure 106. Contract Payment Estimate Summary – Notes tab

Instructions 110

Navigation: Construction > Contract Payment Estimate Summary > Notes tab

To add notes to a payment estimate:

1. Click the **Notes** tab.
2. Click the **New** button.
3. In the **Payment Estimate Note** field, enter a comment related to the estimated payment made to the contractor for work performed on the contract. **(First progress estimate)**
4. Click the **Save** button.

Maintaining Exceptions for a Payment Estimate

The Exceptions tab on the Contract Payment Estimate Summary lists exceptions and discrepancies generated for the payment estimate. You can view the list of exceptions and address them as needed to allow approval of the payment estimate. You address an exception by changing its status to Unresolved, Acknowledged, or Overridden. FDOT has determined the exceptions and discrepancies that are tracked, and the policies for addressing them.

After payment estimate exceptions are addressed as needed, you can recalculate to view the results. The system recalculates exceptions for the payment estimate, deletes line-item adjustments generated by payment exceptions, and recalculates funding.

Required fields are:

- Status

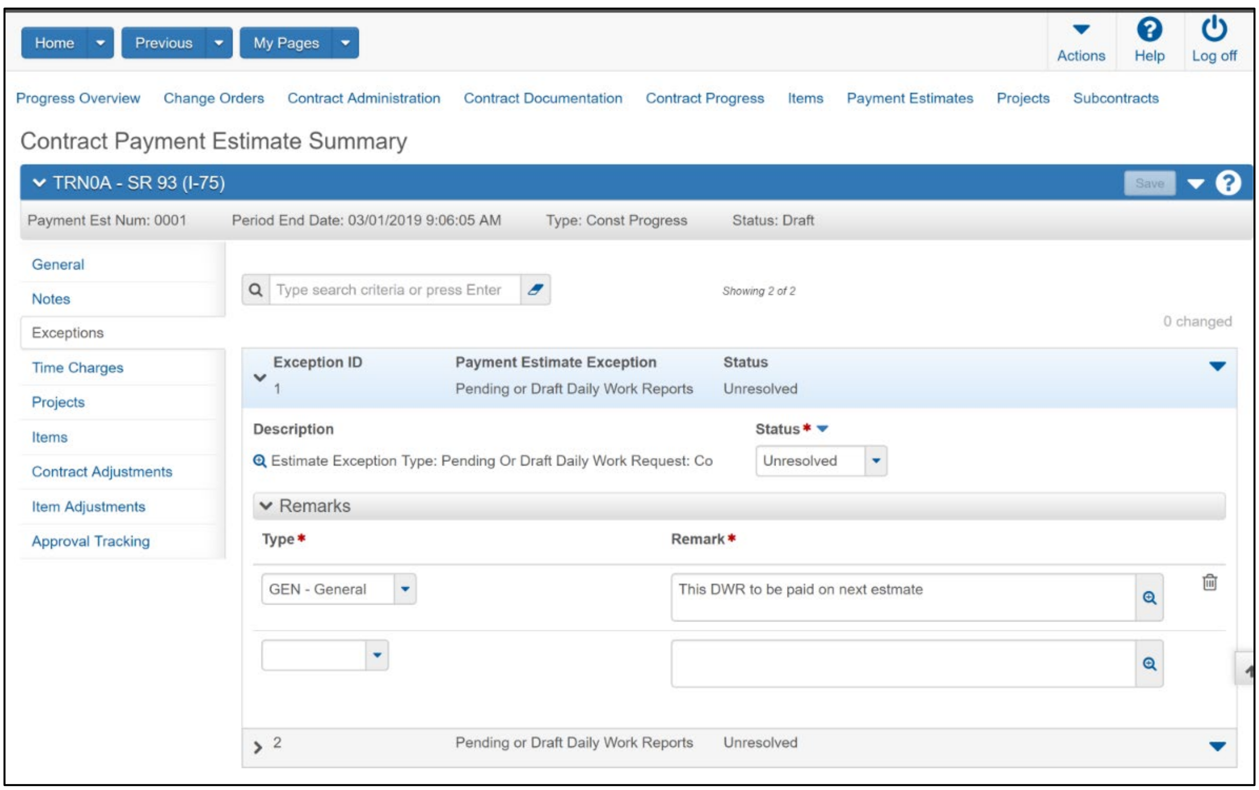


Figure 107. Contract Payment Estimate Summary – Exceptions tab

Instructions 111

Navigation: Construction > Contract Payment Estimate Summary > Exceptions tab

To address Exceptions for a Payment Estimate:

1. Click the **Exceptions** tab.
2. Click the expand arrow for the selected exceptions. **(1)**
3. In the **Status** field, click the drop-down arrow and select the state of the contract payment estimate exception. **(Acknowledged)**
4. In the **Remarks Type** field, click the drop-down arrow and select the remark type. **(GEN - General)**
5. In the **Remark** field, enter a remark. **(Reviewed and no further action needed at this time)**
6. Click the **Save** button.

Viewing Time Charges for a Payment Estimate

The Time Charges tab on the Contract Payment Estimate Summary contains a list of contract times associated with the contract. This information is view only.

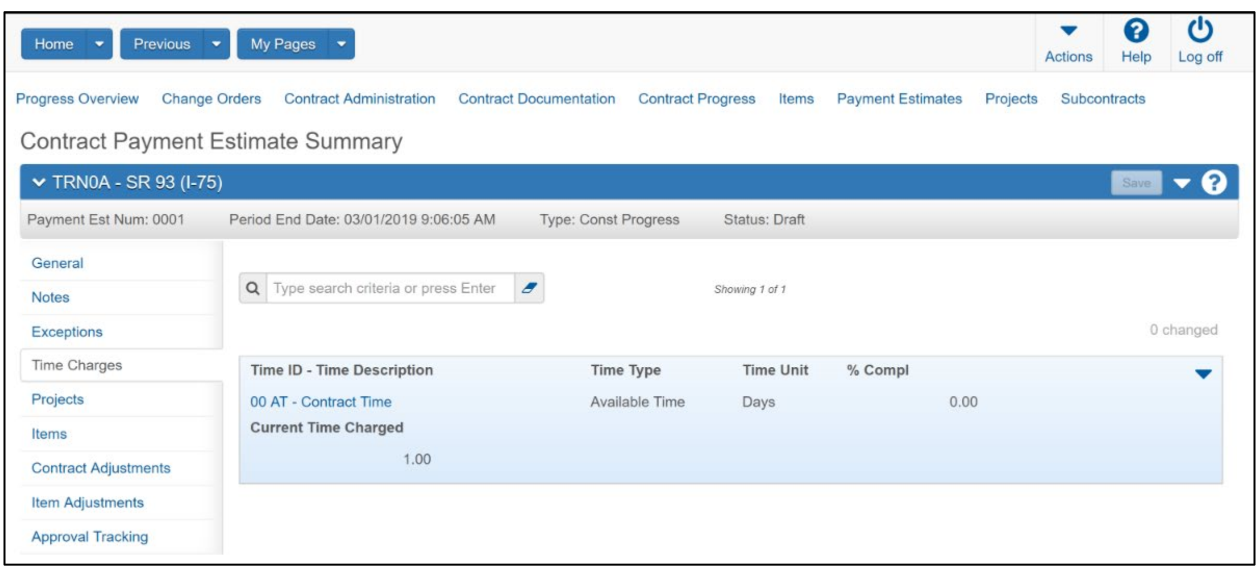


Figure 108. Contract Payment Estimate Summary – Time Charges tab

Instructions 112

Navigation: Construction > Contract Payment Estimate Summary > Time Charges tab

To view Time Charges for a Payment Estimate:

1. Click the **Time Charges** tab.
2. View the time charges for the payment estimate.

Maintaining Project Vouchers for a Payment Estimate

The Projects tab on the Contract Payment Estimate Summary contains a list of projects for the payment estimate, along with any voucher information recorded for each project. A voucher is a record of payment for work performed on a project. Each project payment estimate can have only one voucher number. You can add a voucher when a payment estimate is in Draft status and the payment estimate project does not already have a voucher.

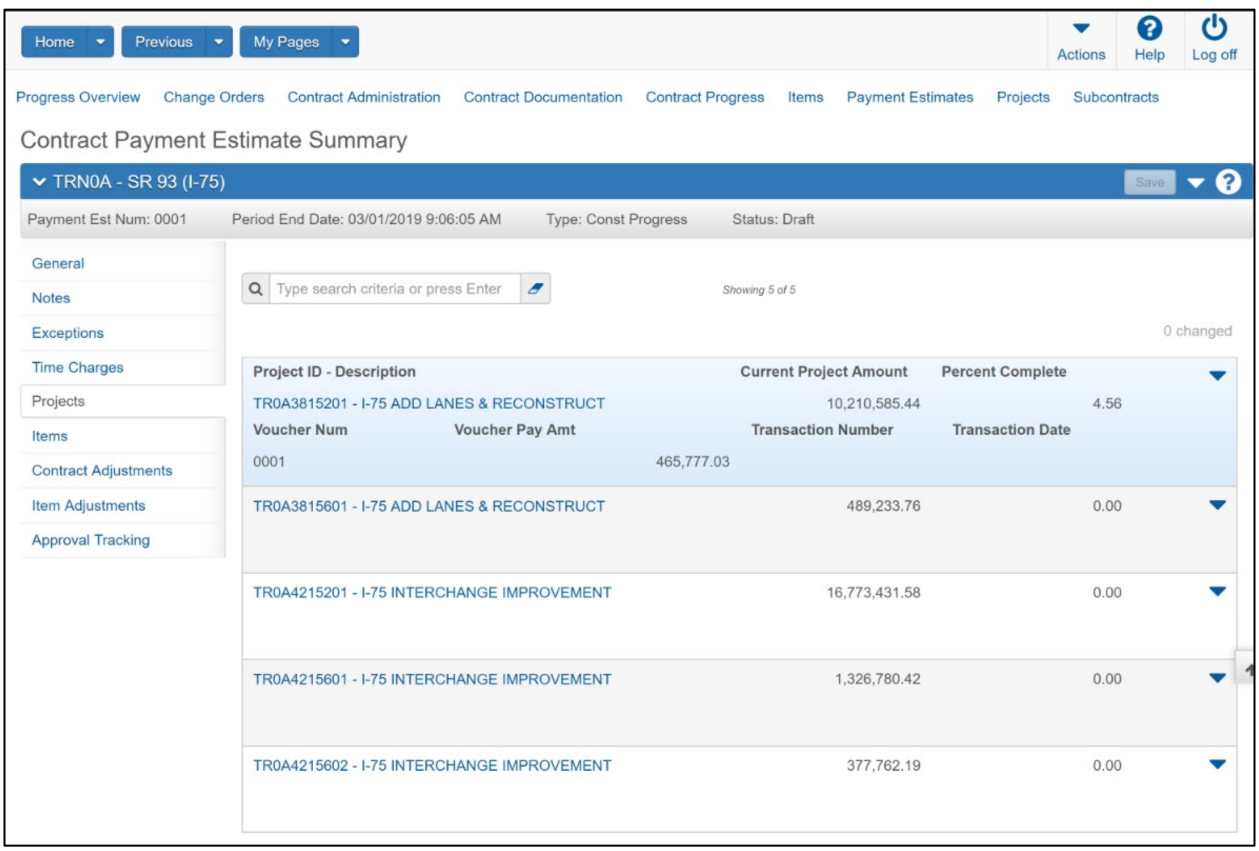


Figure 109. Contract Payment Estimate Summary – Projects tab

Instructions 113

Navigation: Construction > Contract Payment Estimates Summary > Projects tab

To add Project Vouchers for a Payment Estimate:

1. Click the **Projects** tab.
2. For the appropriate project, click the project row **Actions** button, and select the **Add Voucher** action. (Skip. In training, your payment estimate includes activity so vouchers were automatically created.)
3. Click the **Save** button.

Viewing a Payment Estimate for a Contract Project

The Payment Estimate Project Summary lists information about all of the payment estimates recorded for the selected contract project. The component displays read-only information.

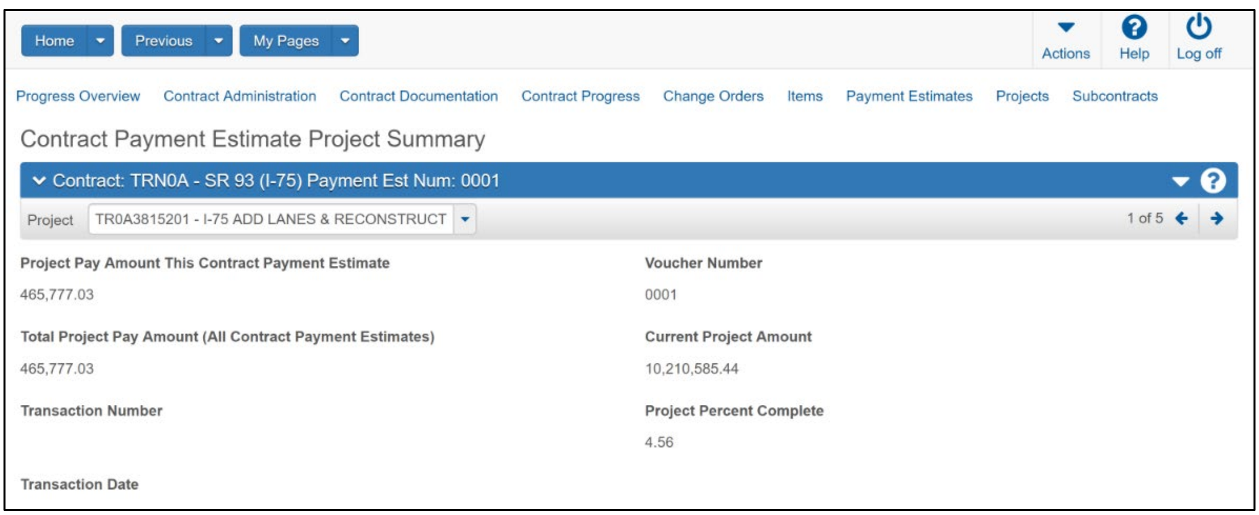


Figure 110. Contract Payment Estimate Project Summary

Instructions 114

Navigation: Construction > Payment Estimates Summary > Projects tab > Project ID link

To view a Payment Estimate for a Contract Project:

1. On the **Projects** tab, click the **Project ID** link. **(TRXX6915201,** where XX is your contract number**)**
2. View the information.
3. Click the **Previous** button at top of window.

Viewing Item Information for a Payment Estimate

The Items tab on the Contract Payment Estimate Summary displays read-only information about items included in the selected payment estimate.

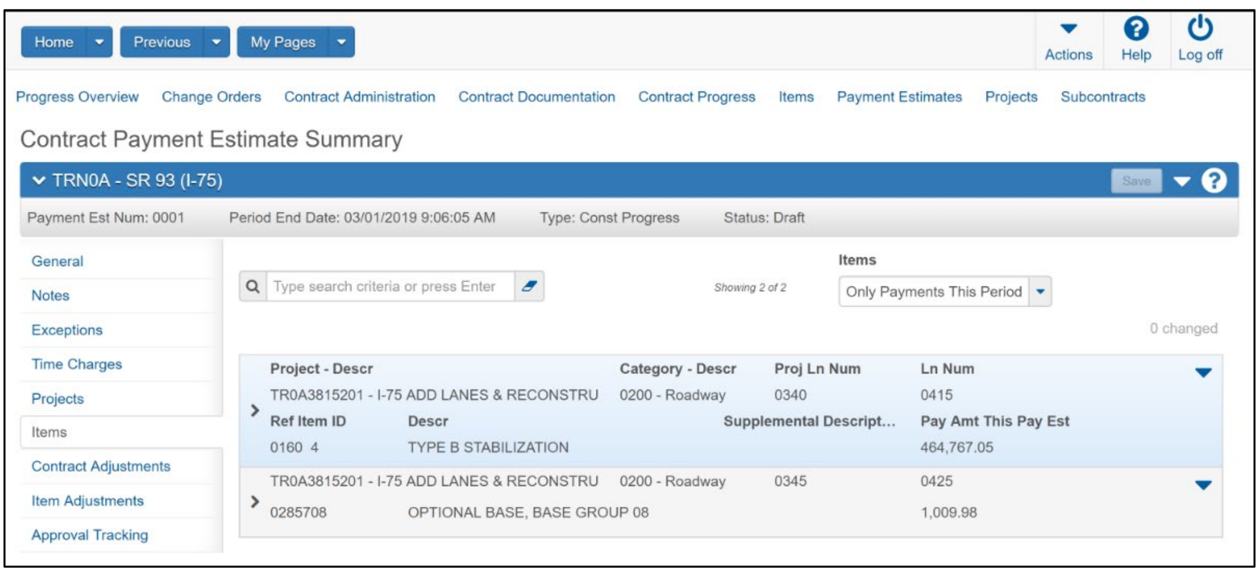


Figure 111. Contract Payment Estimate Summary – Items tab

Instructions 115

Navigation: Construction > Payment Estimates Summary > Items tab

To view item Information for a Payment Estimate:

1. From the **Contract Payment Estimate Summary**, click the **Items** tab.
2. Search for the appropriate item and click the expand arrow to view the item information. **(View any item)**

Maintaining Contract Adjustments for a Payment Estimate

The Contract Adjustments tab on the Contract Payment Estimate Summary provides information about payment estimate adjustments at the contract level. All of the contract adjustments that have been made for a payment estimate are displayed in two collapsible sections, one for system-generated adjustments and the other for adjustments entered manually. You can create as many contract adjustments for a payment estimate as you want, as long as the estimate is in Draft status.

Note: The payment estimate must be in draft status in order to make any contract adjustments.

Required fields are:

- Type
- Amount

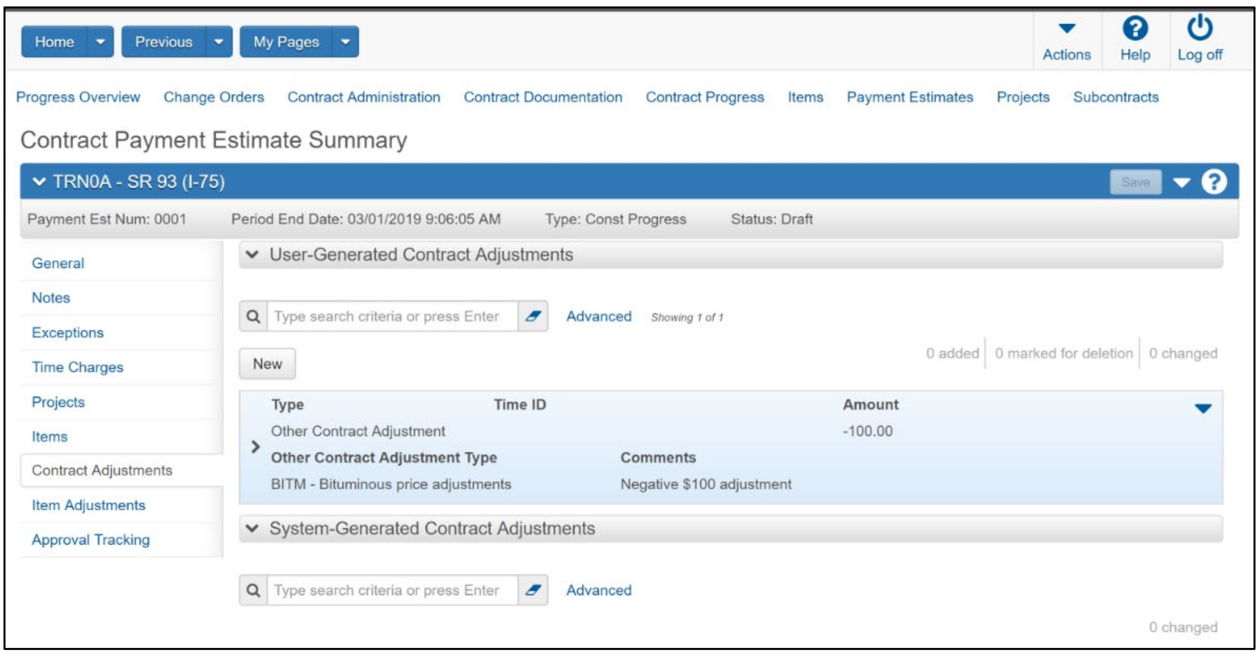


Figure 112. Contract Payment Estimate Summary – Contract Adjustments tab

Viewing System-Generated Contract Adjustments

The System-Generated Contract Adjustments section of the tab displays an accordion list of all adjustments created by the system for this payment estimate. The information in this section is for viewing only and cannot be modified. The types of system-generated contract adjustments include Liquidated Damages, Disincentive, and Incentive.

Instructions 116

Navigation: Construction > Payment Estimates > Payment Estimates Summary > Contract Adjustments tab

To view System-Generated Contract Adjustments for a Payment Estimate:

1. Click the **Contract Adjustments** tab.
2. In the **System-Generated Contracts Adjustments** section, search for and select the appropriate item adjustment. (There are no contract adjustments to view in training)
3. View the information.

Adding User-Generated Contract Adjustments

The User-Generated Contract Adjustments section displays an accordion list of all adjustments that have been made manually for the payment estimate. There are four types of user-generated contract adjustments: Liquidated Damages, Disincentive, Incentive, or Other Contract Adjustment.

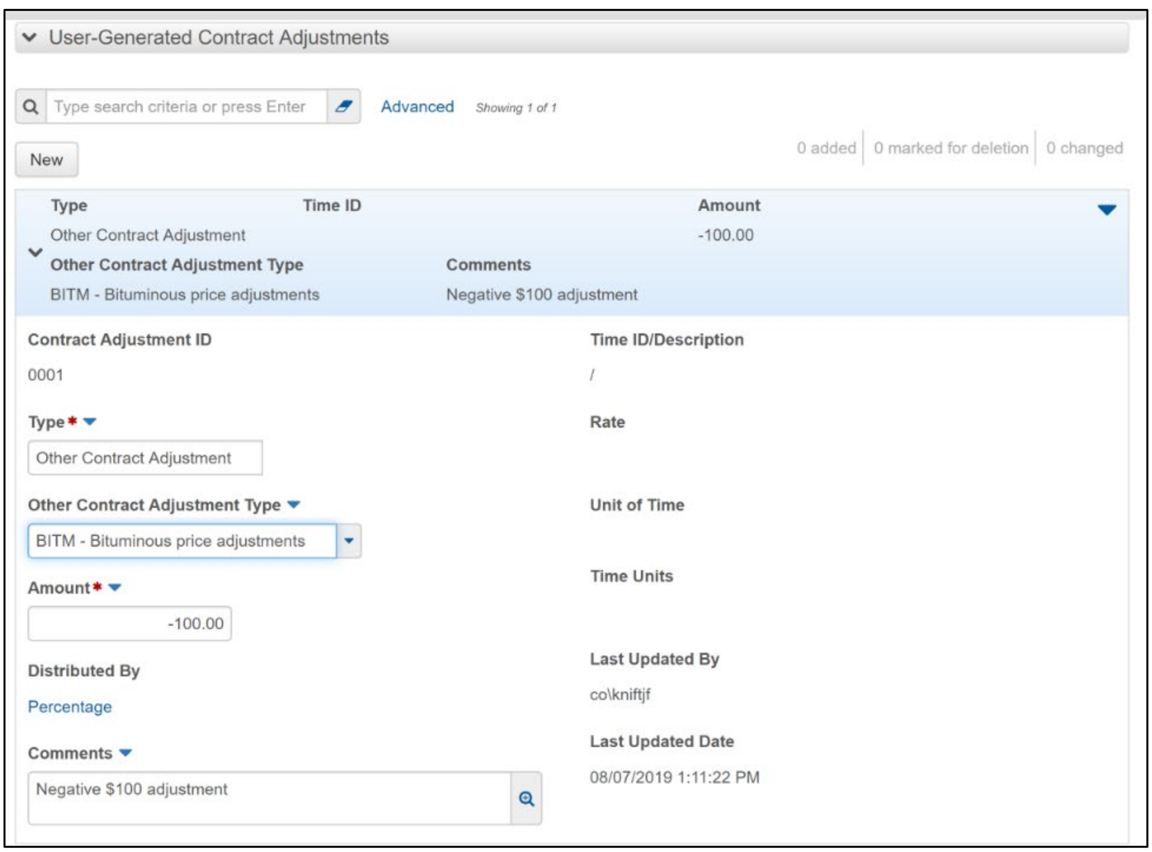


Figure 113. User-Generated Contract Adjustments

Instructions 117

Navigation: Construction > Payment Estimates > Payment Estimates Summary > Contract Adjustments tab

To add User-Generated Contract Adjustments for a Payment Estimate:

1. In the **User-Generated Contract Adjustments** section, click the **New** button.
2. In the **Type** field, click the drop-down arrow and select the adjustment type. **(Other Contract Adjustment)**
3. In the **Other Contract Adjustment Type**, click the drop-down arrow and select the identifier for the contract adjustment. **(BITM – Bituminous price adjustments)**
4. In the **Amount** field, enter the dollar amount of the contract adjustment on the payment estimate. **(2351.65)**
5. In the **Comments** field, enter any additional information about the adjustment. **(BIT adjustment for 12 tons of asphalt)**
6. In the **Time ID/Description** field, search for and select the identification name or number for the contract time. **(Skip)**
7. The **Rate** field indicates the rate of incentive, disincentive, or liquidated damage for the specified contract time, if applicable.
8. The **Unit of Time** field indicates the type of unit used to measure the contract time.
9. The **Time Units** field indicates the current number of time units specified for completion of a contract time.
10. The **Last Updated By** field indicates the name of the person who most recently changed the record.
11. The **Last Updated Date** field indicates the date and time the record was most recently changed.
12. Click the **Save** button.

Distributing Contract Adjustments

When a contract adjustment is added to a payment estimate, the system automatically creates the associated distribution records for all the projects and project categories in the payment estimate. You can adjust the distribution, and can distribute the adjustment amount by percentage or dollar amount.

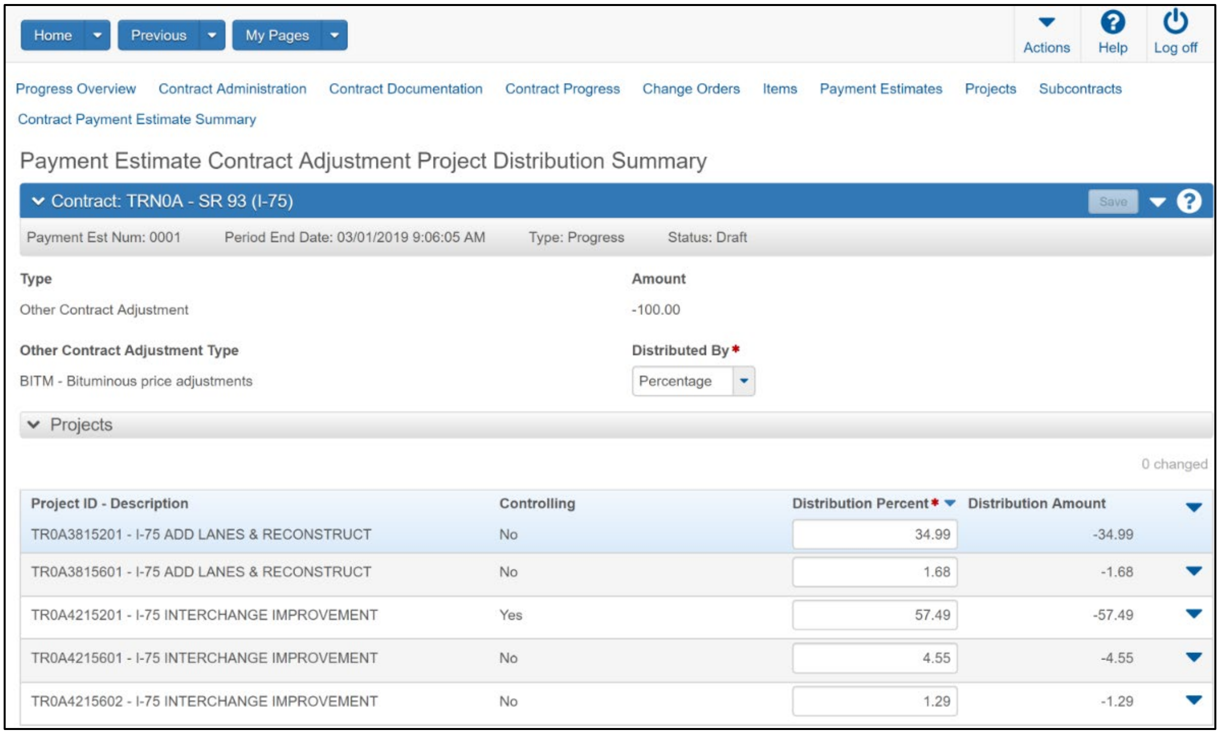


Figure 114. Payment Estimate Contract Adjustment Project Distribution Summary

Instructions 118

Navigation: Construction > Payment Estimates > Payment Estimates Summary > Contract Adjustments tab > Distributed By link

To view or modify distribution for a Contract Adjustment:

1. In the **User-Generated Contract Adjustments** section, click the link in the **Distributed By** field for an adjustment. **(Percentage)**

   The system displays the Payment Estimate Contract Adjustment Project Distribution Summary component, where you can view or modify the distribution percentage or dollar amount.

2. In the **Distributed By** field, click the drop-down arrow and select **Amount** to modify the adjustment distribution by dollar amount. **(Skip)**
3. Click the **Save** button.
4. In the **Projects** area or in the **Project-Categories** area, click in the **Distribution Amount** field for a row to modify the distribution adjustment amount for the project or category. **(Skip)**
5. In the **Distributed By** field above, click the drop-down arrow and select **Percentage** to modify the adjustment distribution by percentage. **(Skip)**

6. Click the **Save** button.
7. In the **Projects** area or in the **Project-Categories** area, click in the **Distribution Percent** field for a row to modify the distribution adjustment percent for the project or category. **(Skip)**
8. Click the **Save** button.
9. Click the **Contract Payment Estimate Summary** quick link to return to the **Contract Adjustments** tab.

Maintaining Item Adjustments for a Payment Estimate

The Item Adjustments tab on the Contract Payment Estimate Summary provides information about payment estimate adjustments at the item level. Item adjustments can result from item overruns, price changes, and for other reasons defined by FDOT. The Item Adjustments tab displays a row for each item adjustment associated with the payment estimate. Item adjustments are grouped by type in three sections: User Generated Quantity Based Adjustments, User Generated Dollar Based Adjustments, and System Generated Item Adjustments.

Note: The payment estimate must be in *Draft* status to make any item adjustments.

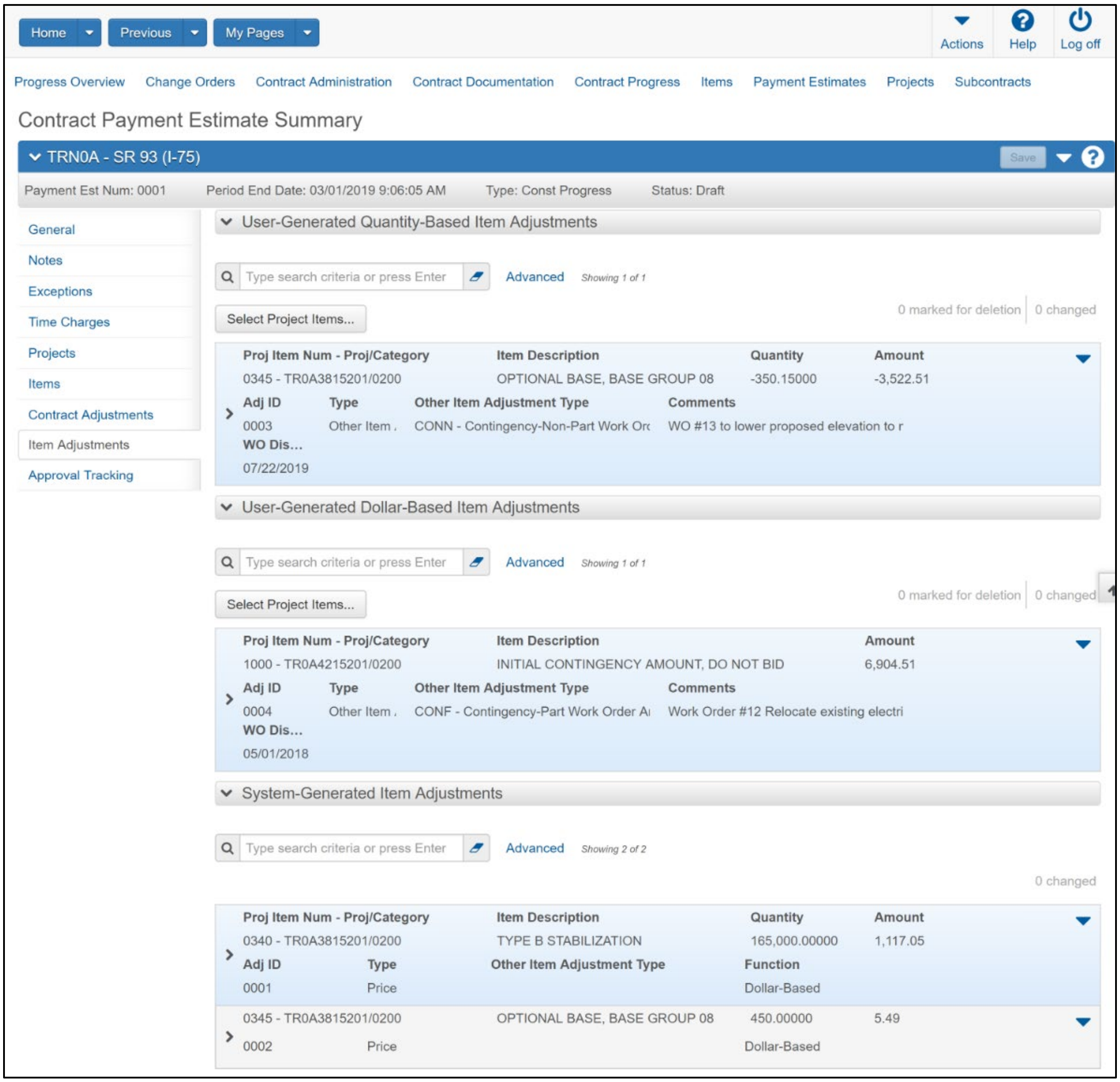


Figure 115. Contract Payment Estimate Summary – Item Adjustments tab

Viewing System-Generated Item Adjustments

The System-Generated Contract Adjustments section of the Item Adjustments tab displays an accordion list of all item adjustments that have been created by the system for the estimate. The information in this section is for viewing only; you cannot modify a system-generated item adjustment. System generated item adjustments can result from item overruns, and price changes.

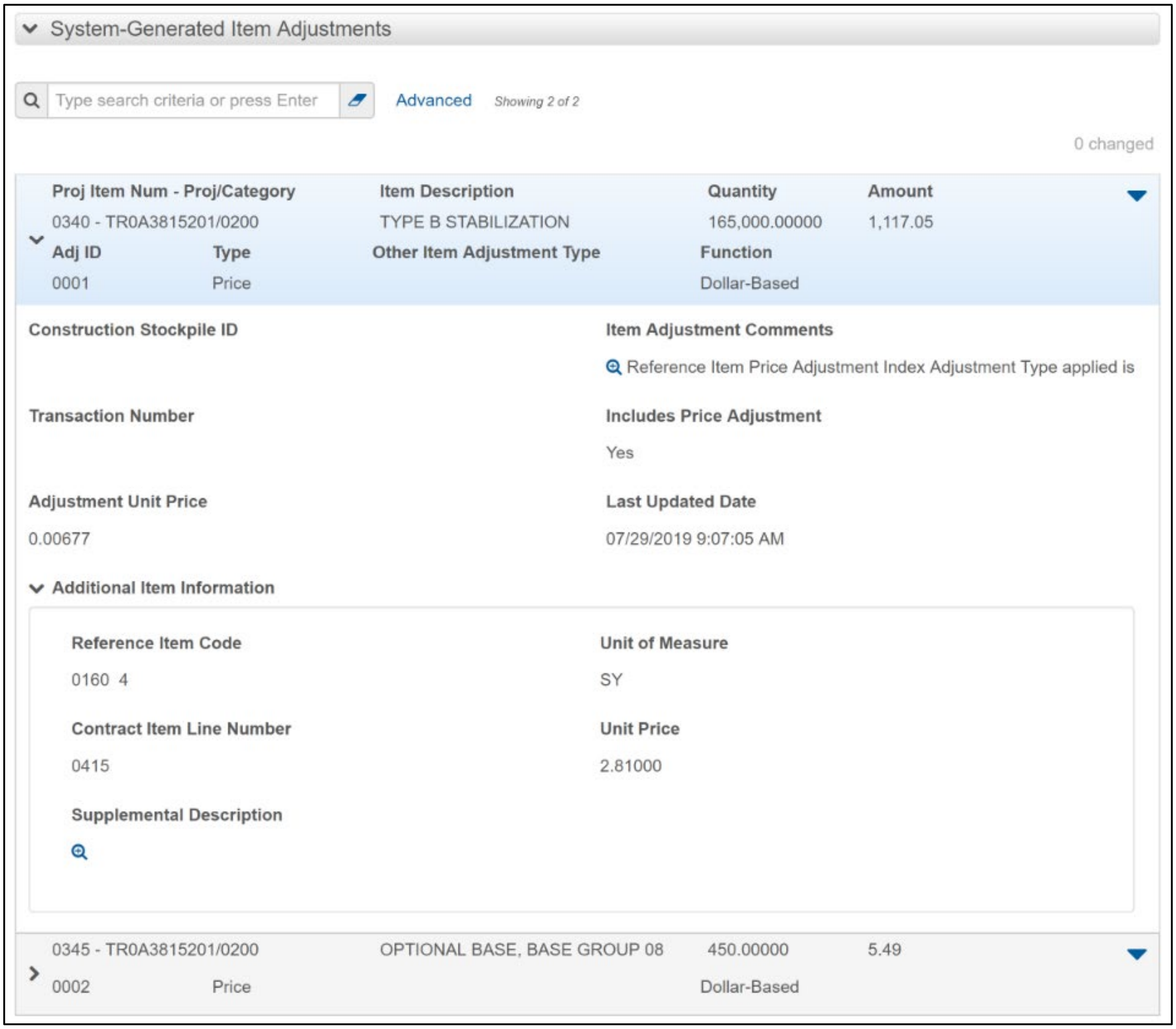


Figure 116. System Generated Item Adjustments

Instructions 119

Navigation: Construction > Payment Estimates Summary > Item Adjustments tab

1. Click the **Item Adjustments** tab.
2. In the **System-Generated Item Adjustments** section, locate the appropriate item adjustment and click the expand arrow. (Adj ID: **0002)**
3. View the information.

Adding a User Generated Quantity-Based Adjustment

There is only one type of user-generated quantity-based item adjustments, Other Item Adjustment, and you can only create one per item. User-generated quantity-based item adjustments are temporary adjustments made against a line item with an approved DWR installed quantity included on the current payment estimate, and they affect quantity as well as dollars on the item. This is only a temporary adjustment, as the system automatically creates a counteracting system-based adjustment on the very next payment estimate that reverses the original user-based adjustment.

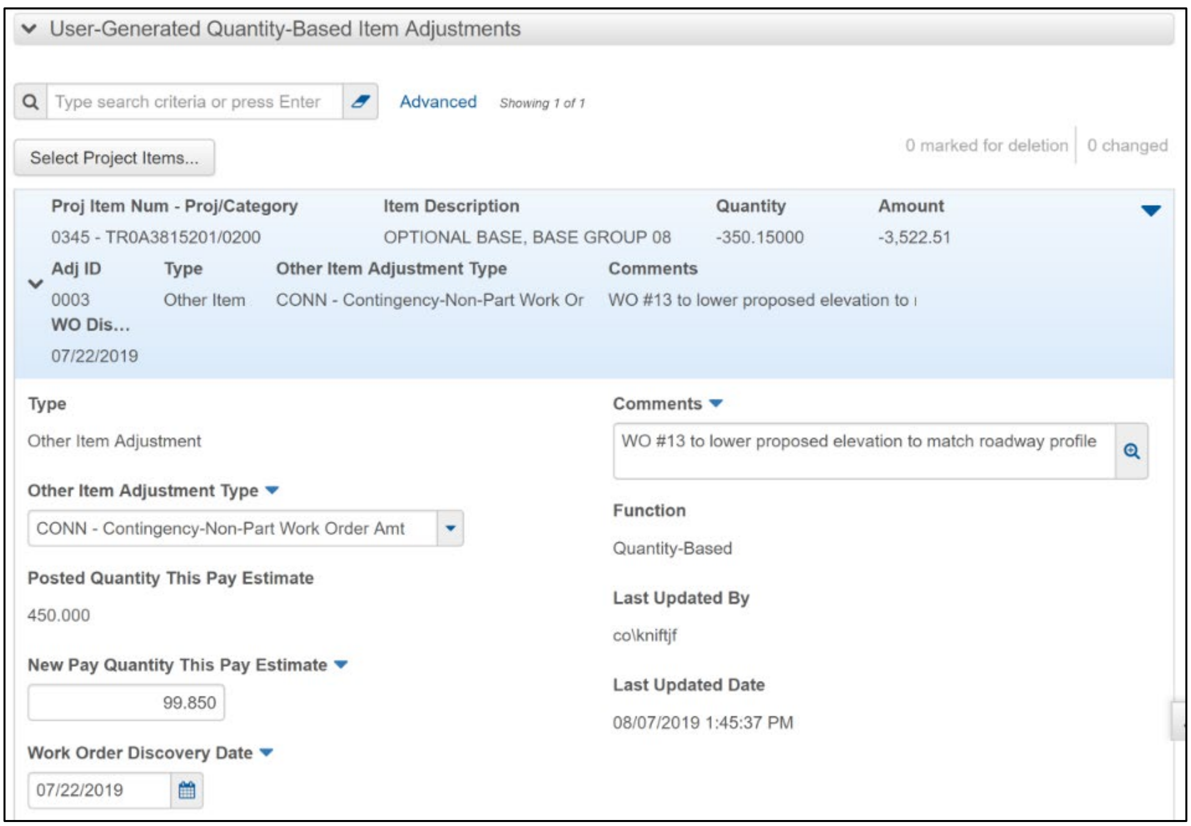


Figure 117. User Generated Quantity Based Item Adjustments

Instructions 120

Navigation: Construction > Payment Estimates Summary > Item Adjustments tab

To add a user-generated item quantity adjustment for a payment estimate:

1. Click the **Items Adjustments** tab.
2. In the **User-Generated Quantity Based Item Adjustments** section, click the **Select Project Items** button.
3. Search for and select the items to modify. **(OPTIONAL BASE)**
4. Click the **Add to Item Adjustments** button.
5. In the **Other Item Adjustment Type** field, click the drop-down arrow and select the appropriate type of adjustment. **(THKA – Thickness Adjustment)**
6. The **Posted Quantity This Pay Estimate** field displays the quantity of the item postings included on this estimate.
7. In the **New Pay Quantity This Pay Estimate** field, enter the adjusted payment quantity. **(1520)**
8. In the **Work Order Discovery Date** field, enter the date the CO was first brought to the attention of FDOT personnel. **(When needed, enter a date)**
9. In the **Comments** field, enter any additional information for this item adjustment. **(Adjustment -20)**

   Include the reason for this adjustment.
10. Click the **Save** button.

Adding a User Generated Dollar-Based Item Adjustment

There are only two types of user-generated dollar-based item adjustments: Other Item Adjustment or Overrun, and you can create as many per item as you need. Enter the specific amount of the adjustment on the item. This is a permanent adjustment that the system will never attempt to reverse in any way, and they only affect dollars on the item. You can only reverse or change a dollar-based item adjustment by manually creating another dollar-based item adjustment on the same or later payment estimate.

Required fields are:

- Type

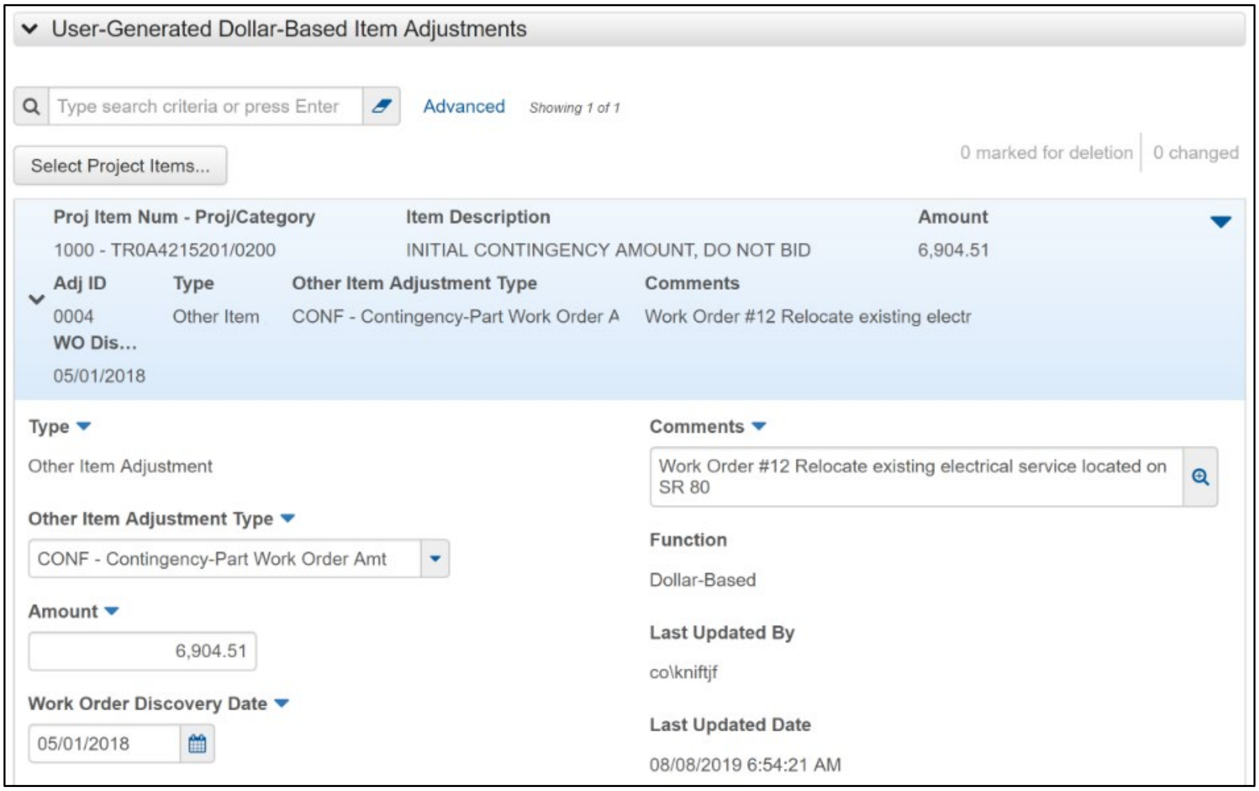


Figure 118. User Generated Dollar Based Item Adjustments

Instructions 121

Navigation: Construction > Payment Estimates Summary > Item Adjustments tab

To add a user-generated item dollar adjustment for a payment estimate:

1. In the **User-Generated Dollar-Based Item Adjustments** section, click the **Select Project Items** button.
2. Search for and select the items to modify. **(MANHOLE)**
3. Click the **Add to Item Adjustments** button.
4. Click the expand arrow for the row.
5. In the **Type** field, click the drop-down arrow and select the type of adjustment. **(Other Item Adjustment)**
6. In the **Other Item Adjustment Type** field, click the drop-down arrow and select the other item type of adjustment . **(PRIC-PRICE)**
7. In the **Amount** field, enter the dollar amount of the adjustment. **(300)**
8. In the **Work Order Discovery Date** field, enter the date the CO was first brought to the attention of FDOT personnel. **(When needed, enter a date**)
9. In the **Comment** field, enter any additional information about the record. **(Price adjustment)**

   For all adjustments, document the reason for the adjustment and include a description of how the dollar amount was determined.

10. The **Function** field indicates the basis used for the adjustment.
11. The **Last Updated By** field indicates the name of the person who most recently changed the record.
12. The **Last Updated Date** field indicates the date and time the record was most recently updated.
13. Click the **Save** button.

Changing the Status of a Payment Estimate

The Contract Payment Estimate Summary enables users to change the status of a payment estimate to Pending Approval, Approved, Rejected, or back to Draft. To change the status of a payment estimate, your active user role must be assigned the current approval level for the payment estimate.

Submitting for Approval

The Submit for Approval command is available only for payment estimates with a status of Draft or Rejected, and only if your active user role is assigned approval level 1 (the first approval level in the series) for the payment estimate.

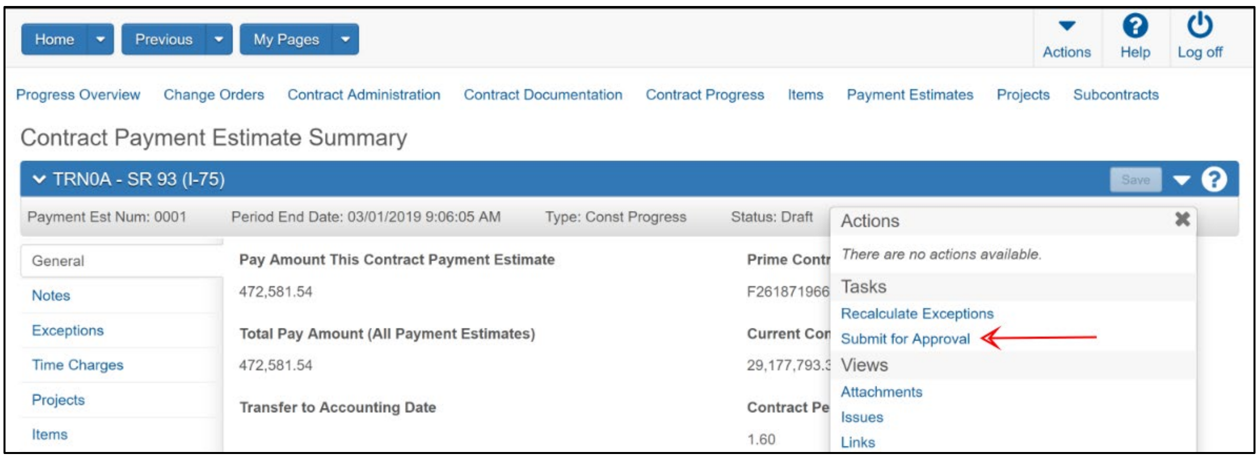


Figure 119. Contract Payment Estimate Summary – Submit for Approval

Instructions 122

Navigation: Construction > Payment Estimates Summary

To change the status of a Payment Estimate:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCRCSS)**
2. Click the **General** tab.
3. Click the component **Actions** button, and select the **Submit for Approval** action.

   Note that the system changed the status to Pending Approval.

Changing to Draft

You can change the status of a payment estimate from Rejected or Pending Approval to Draft. The Change to Draft command is available only if the payment estimate status is Pending Approval and your active user role is assigned approval level 1, or if the payment estimate status is Rejected and your active user role has been assigned Change Estimate to Draft access rights.

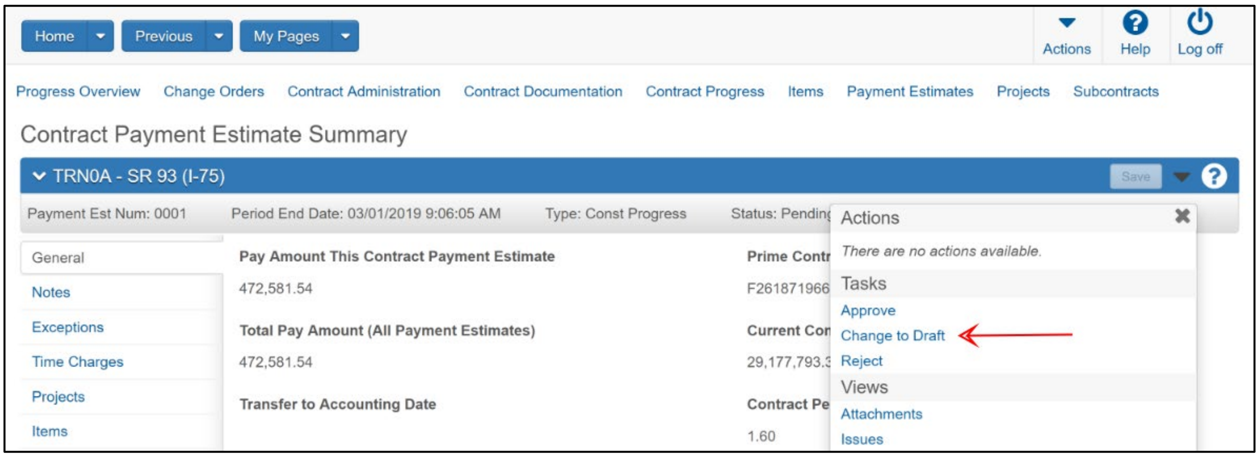


Figure 120. Contract Payment Estimate Summary – Change to Draft

Instructions 123

Navigation: Construction > Payment Estimates Summary

To change the status of a Payment Estimate:

1. Click the component **Actions** button, and select the **Change to Draft** action.

   Note that the system changed the status to Draft.

2. Click the component **Actions** button, and select the **Submit for Approval** action.
3. Click the **Home** button.

Making Payment Estimate Approval Decisions

The Payment Estimate Approval Decision Overview lists rows of approval decision records for payment estimates that you can either approve or reject. This list includes only those approval decision records for payment estimates that have a status of Pending Approval and for which your active user role is assigned an approval decision of Pending Approval.

Approving a Payment Estimate

The Approve command is available only if the payment estimate status is in one of the approval levels for the payment estimate type and only if your active user role is assigned the correct services in access rights.

When you approve a payment estimate, the status of the decision record is changed to Approved, and the status of the next sequential decision record for the payment estimate is changed to Pending Approval. Once an estimate has received the final approval level, the estimate cannot be changed, deleted, or unapproved.

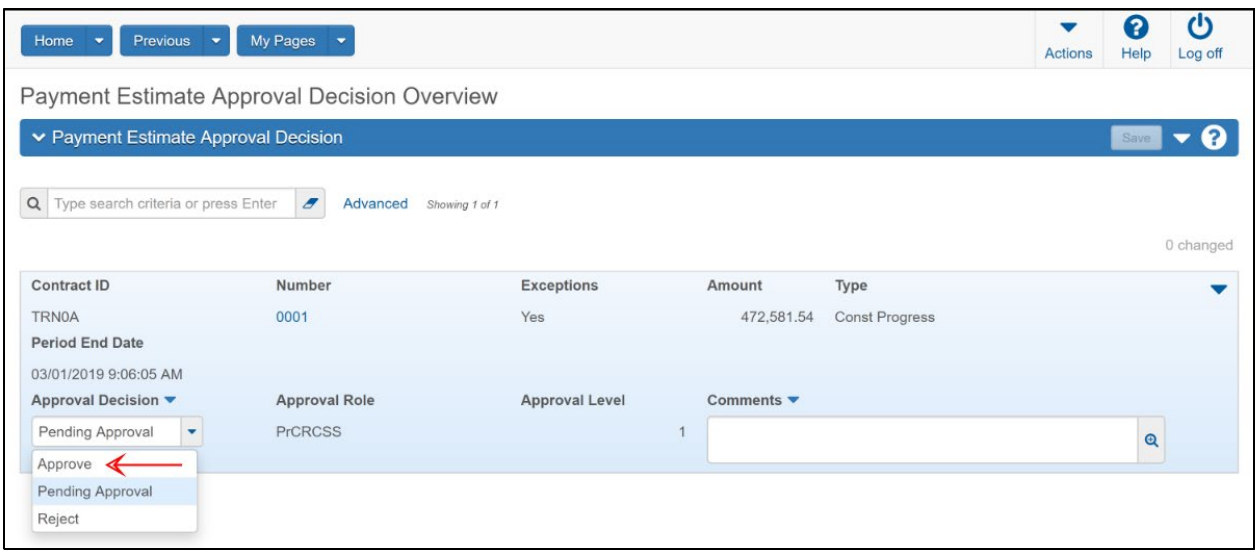


Figure 121. Payment Estimate Approval Decision Overview – Approve

Instructions 124

Navigation: Construction > Payment Estimate Approval Decisions

To approve a Payment Estimate:

1. From the Construction component, select the **Payment Estimate Approval Decisions** link.
2. Search for and select the payment estimate to approve. (Contract ID: **TRNXX,** where XX is your assigned contract number, Estimate Number: **0001)**
3. In the **Approval Decision** field, click the drop-down arrow and select **Approve**.

   Note 'Reject' is available as an approval decision.
4. In the **Comments** field, enter any additional information about the record. **(First approval for estimate 0001)**
5. Click the **Save** button.

Rejecting a Payment Estimate

When you reject a payment estimate, all of the information contained in the payment estimate becomes read-only. A rejected payment estimate can only be modified after a user with the appropriate permissions selects the Change to Draft command to return the payment estimate to draft status.

The Reject command is available only if the payment estimate status is in one of the approval levels for the payment estimate type and only if your active user role is assigned the correct services in access rights.

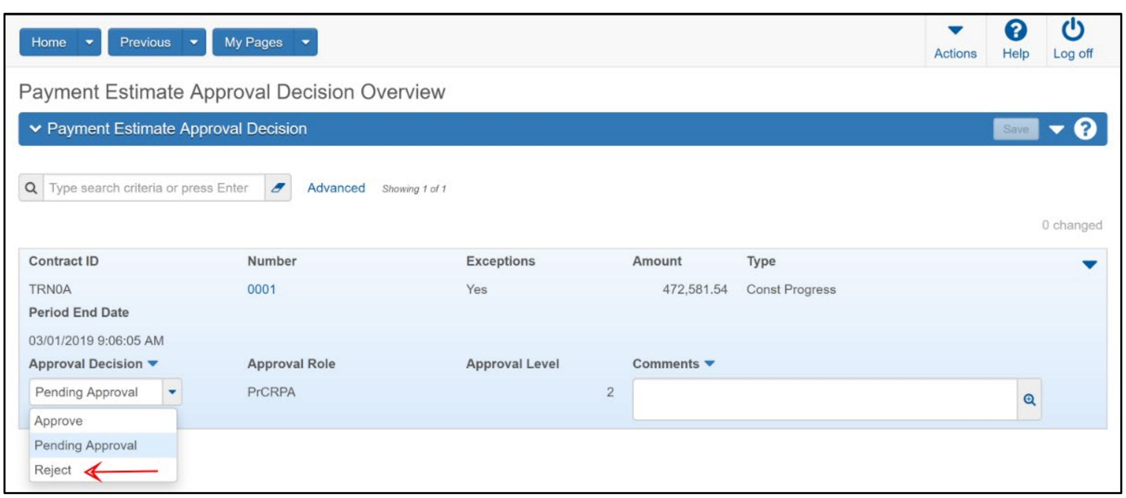


Figure 122. Payment Estimate Approval Decision Overview – Approve

Instructions 125

Navigation: Construction > Payment Estimate Approval Decisions

To reject a Payment Estimate:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCRPA)**
2. Search for and select the **Payment Estimate** to reject. **(**Contract ID: **TRNXX,** where XX is your assigned contract number, Number: **0001)**
3. In the **Approval Decision** field, click the drop-down arrow and select **Reject**.
4. In the **Comments** field, enter any additional information about the record. **(Level 2 rejecting estimate)**
5. Click the **Save** button.
6. Click the **Home** button.

Tracking Payment Estimate Approval Decisions

The Approval Tracking tab on the Contract Payment Estimate Summary lists rows of decision records for each approval level needed for the contract payment estimate. This list enables you to view the decisions and comments entered by all the users who are responsible for approving the payment estimate. The information displayed on this tab is for review and tracking purposes and cannot be edited.

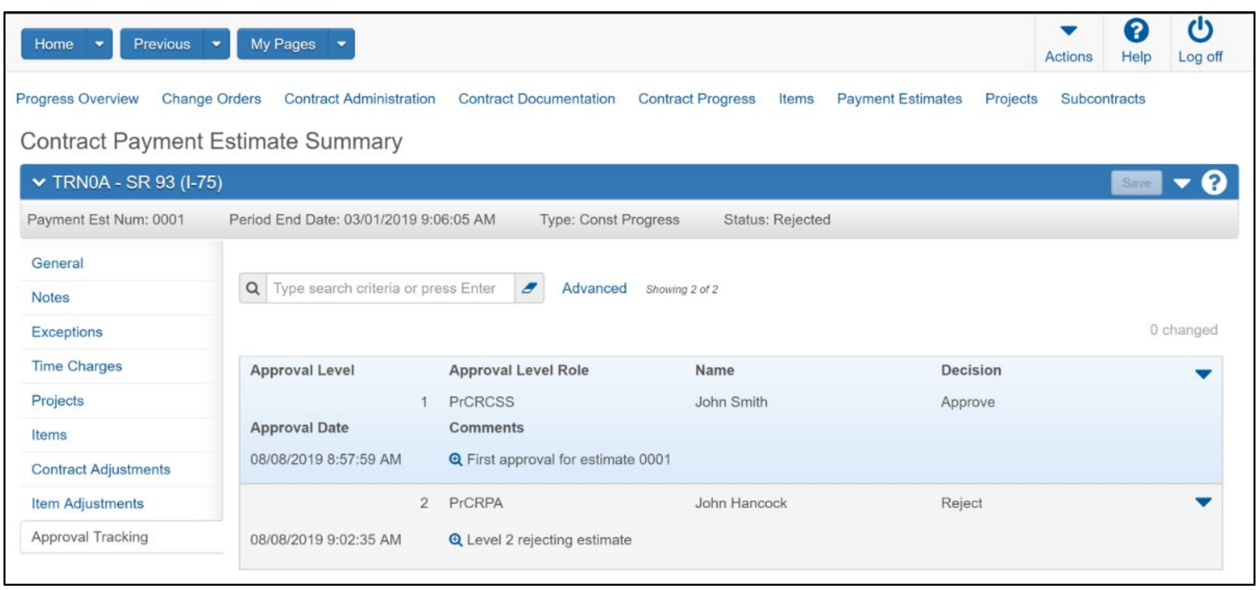


Figure 123. Contract Payment Estimate Summary – Approval Tracking tab

Instructions 126

Navigation: Construction > Payment Estimates Summary > Approval Tracking tab

To view approval decisions for a Payment Estimate:

1. From the **Construction** component, click the **Contract Progress** link.
2. Search for and select the appropriate contract. **(TRNXX,** where XX is your assigned contract number**)**
3. Click the **Payment Estimates** tab.
4. Click the **Show first 10** link.
5. Search for and open the estimate to review. **(0001)**
6. Click the **Approval Tracking** tab.
7. View the information.
8. Click the **Contract Progress** quick link.

Viewing Contract Progress Estimate Contract Adjustments

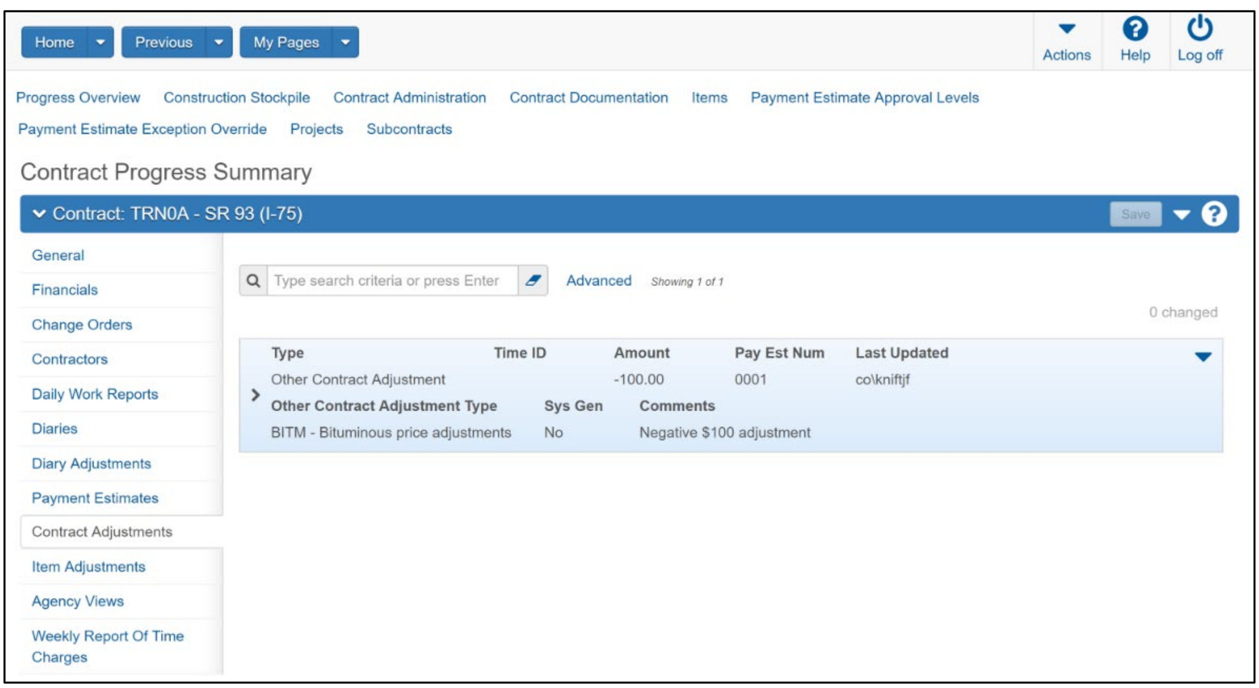


Figure 124. Contract Progress Summary – Contract Adjustments tab

Instructions 127

Navigation: Construction > Contract Progress Summary > Contract Adjustments tab

To view a Contract Adjustment:

1. From the **Contract Progress Summary**, click the **Contract Adjustments** tab.
2. Click the **Show first 10** link.
3. Click the expand arrow for the row to view the selected contract adjustment. (Type: **Other Contract Adjustment**; Other Contract Adjustment Type: **BITM – Bitumionous price adjustments)**

Generating Payment Estimate Reports

Numerous reports are available to track and review information about payment estimates, such as the Items with Unpaid Placed Quantities report, Payment Estimate Contract Summary report, Payment Estimate for Contractor report, Payment Estimate Project Summary report, Payment Estimate Summary by Project report, and the Summary by Funding report.

FDOT determines the reports available to each role. As a result, some reports might not be available to you.

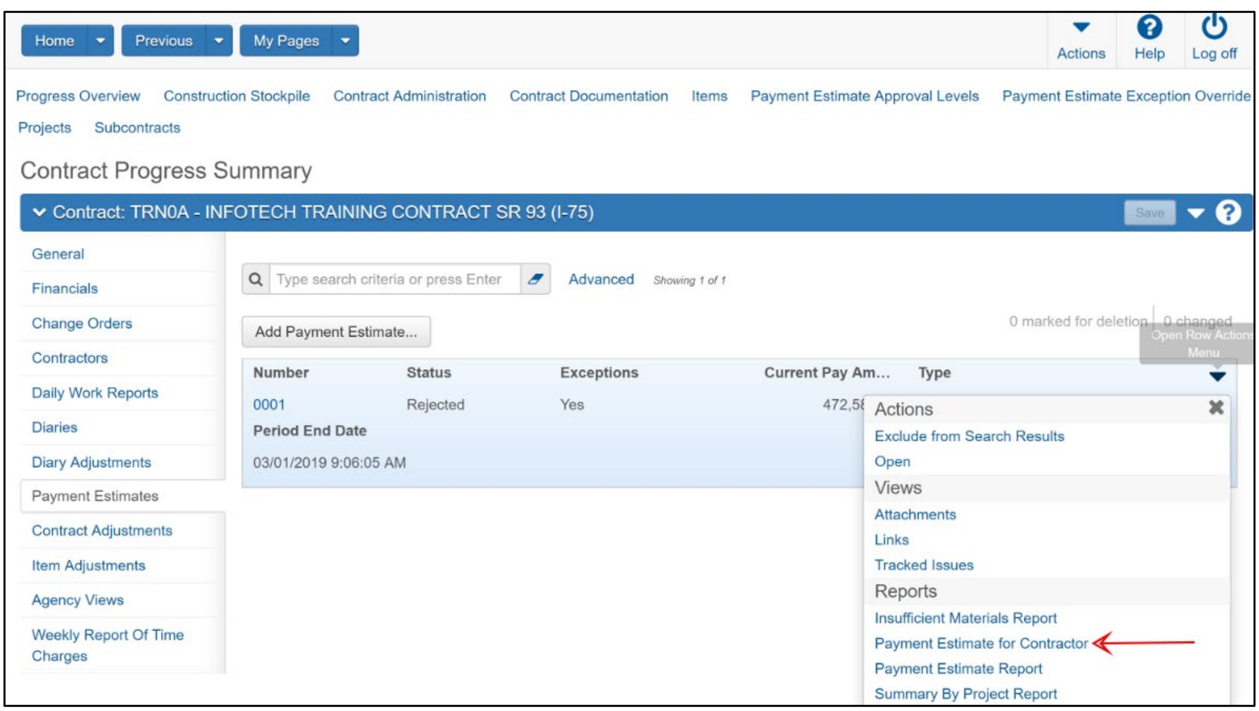


Figure 125. Generate Payment Estimate for Contractor Report

Instructions 128

Navigation: Construction > Payment Estimates

To generate a Payment Estimate for Contractor Report:

1. From the **Contract Progress Summary**, click the **Payment Estimates** tab.

   Alternately, from the Construction component, click the **Payment Estimates** link.

2. For the appropriate payment estimate, click the row **Actions** button. **(0001)**
3. In the **Reports** section, select the **Payment Estimate for Contractor** report.
4. Select the **Output Type**. **(Keep default)**
5. Select the **Report Layout Source**.**(Keep default)**
6. Click the **Execut**e button.
7. Review the report.
8. Close the browser tab containing the report.
9. Click the **Home** button.

Deleting a Contract Payment Estimate

You can delete a payment estimate only when the payment estimate is still in a 'draft' status. If an estimate has been approved at any level, it must first be rejected back to draft status before it can be deleted. A deletion is only necessary where a change in the generated estimate is needed, not in the adjustments. In the case where only adjustments are going to be changed after the initial entry, it is not necessary to delete the estimate. Simply just delete the adjustment and recreate it.

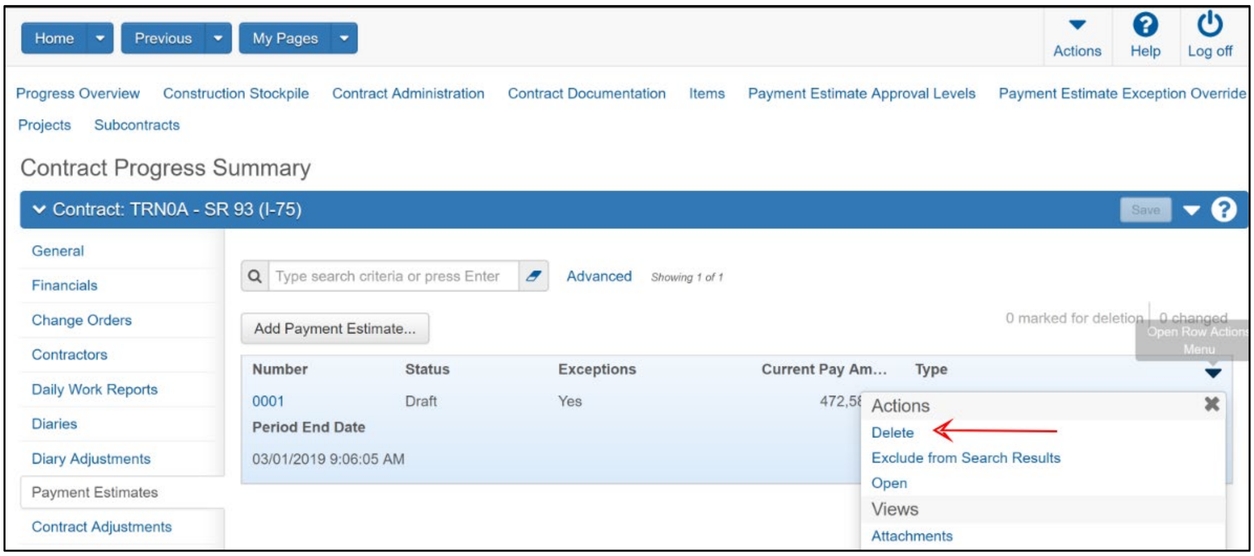


Figure 126. Contract Progress Summary – Payment Estimate tab – Delete

Instructions 129

Navigation: Construction > Payment Estimates

To delete a new payment estimate:

1. From the **Construction** component, click the **Contract Progress** link.
2. Search for and select the appropriate contract. **(TRNXX,** where XX is your assigned contract number**)**
3. Click the **Payment Estimates** tab.
4. Click the **Estimate Number** link for the appropriate Payment Estimate. **(0001)**

5. Click the component **Actions** button, and select the **Change to Draft** action.

   A payment estimate can only be deleted when in a 'draft' status

6. Click the **Previous** button.
7. Click the row **Actions** button for the appropriate Payment Estimate and select the **Delete** action. **(0001**)
8. Click the **Save** button.
9. Click the **Home** button.

Change Orders

Managing Change Orders

Change orders allow you to legally change a signed contract, including: adding new items of work to the contract, increasing/decreasing quantities of existing items, making time extensions, setting final quantities, and specification changes.

Please note that depending on the roles you are assigned, you may not have access to all the functionality shown in this training guide.

FDOT uses the following types of change orders for construction contracts:

- **Contingency Supplemental Agreement (CN):** Will be used to add an additional contingency item as the contingency funds encumbered for the contract are exhausted. Recording actual payments against for work under an Contingency SA will be done as Line Item Adjustments. Tracking of work orders for actual type of work performed and reasons for work will continue to be tracked within our Contract Change Tracking System.
- **Time Extension Agreement (EA):** A CO for use to document time adjustments only. These time adjustments are not included in any other CO type.
- **Holiday Time Extension/Special Events (HTEX):** A CO type to document time extensions for Holiday and special events only.
- **Modifying Pay Item Participation (MPRT):** A CO type to document/change/correct the Part/Non-Part funding of existing pay items.
- **Research Request (RSCH):** A CO to document any special requests for research of new productions, materials or specifications.
- **Supplemental Agreement (SA):** Used to increase or decrease existing contract items, add new items and/or make adjustments to contract time under certain conditions

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

- **Work Order for Spec Change (SPEC):** OnlyA CO type to document a Spec Change only.

- **Unilateral Payment (UN):** A CO type to document and pay for work or time where FDOT and the contractor are not in agreement with the value of the changes. Contractor's signature is not required.

- **Weather Days Time Granted (WE):** A CO type to document time allowed for days when weather conditions prevent the contractor from effectively working on the controlling items of work.

- **Contingency Work Order Time Adj (WOTA):** A CO type that will allow time adjustments made that are covered by a WO.

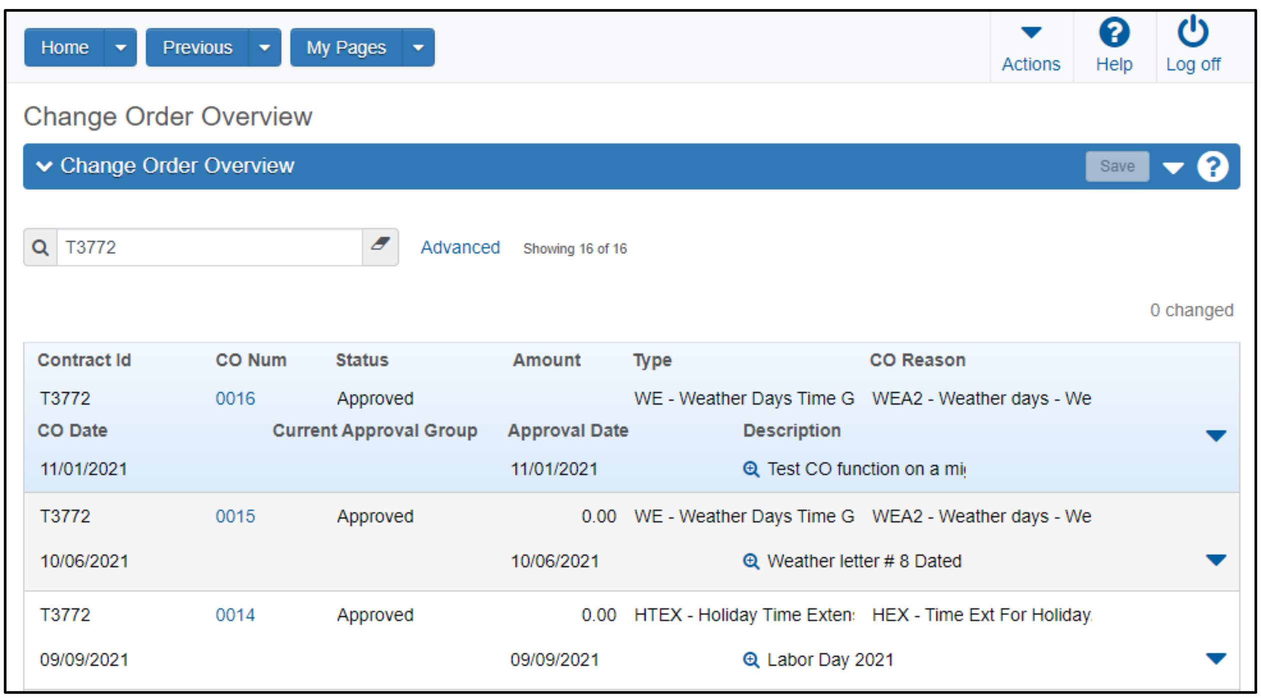


Figure 127. Change Order Overview

Adding a Change Order to a Contract

By default, every new change order has a status of Draft.

Required fields are:

- Description
- Change order Type
- Author

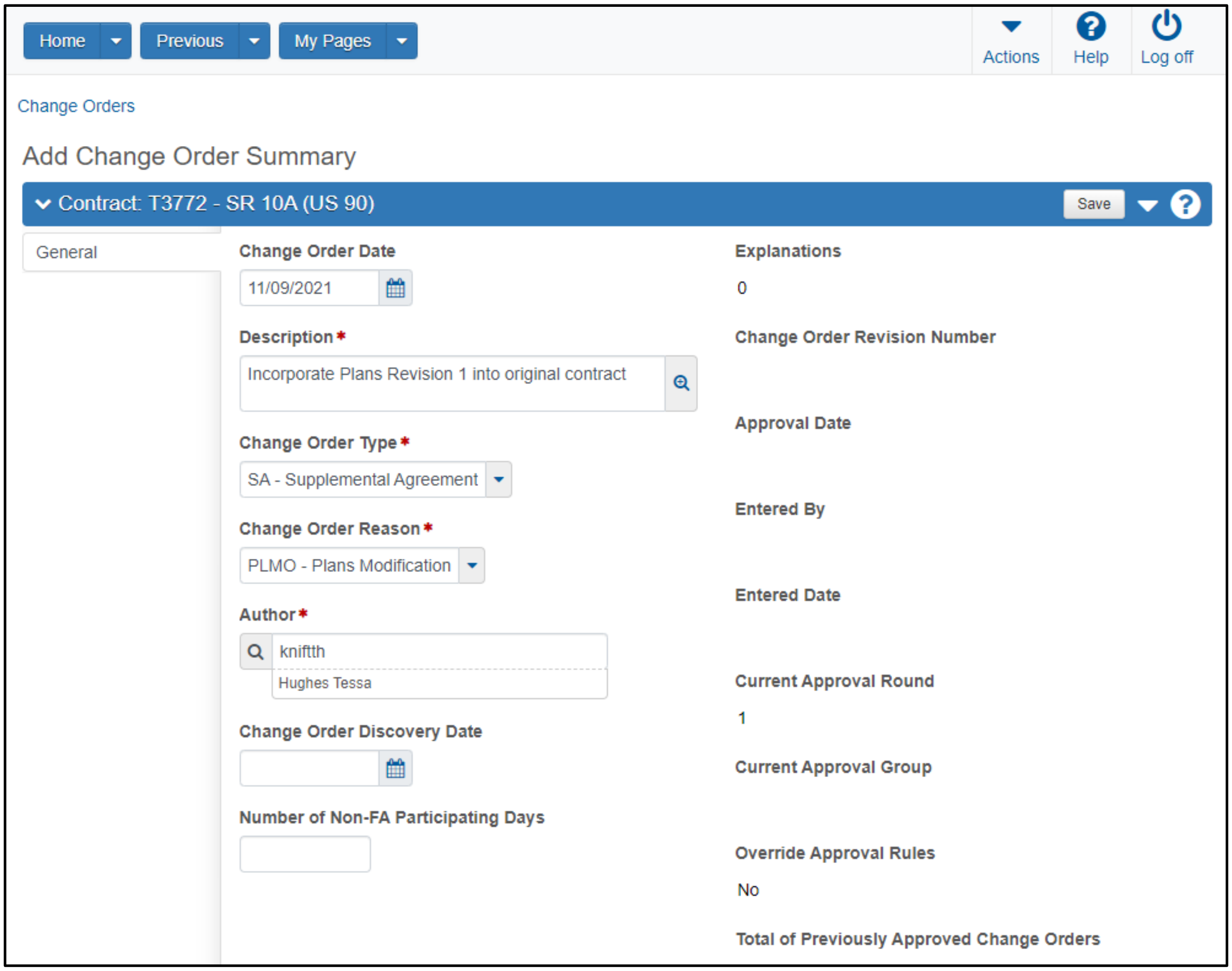


Figure 128. Add Change Order Summary

Instructions 130

Navigation: Construction > Change Order

To add a change order:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCRCSS**)
2. From the **Construction** component, click the **Change Order** link.
3. Click the component **Actions** button, and choose the **Select Contract to Add Change Order…** action.
4. Search for and select the appropriate contract. **(TRNXX,** where XX is your assigned contract number**)**
5. Click the **Create Change Order on Contrac**t button.
6. In the **Change Order Date** field, enter the date of the change order. **(Leave default)**
7. In the **Description** field, enter a description for the change order. **(Incorporate Plans Revision 1 into original contract)**
8. In the **Change Order Type** field, click the drop-down arrow and select the classification for the change order. **(SA - Supplemental Agreement)**
9. In the **Change Order Reason** field, click the drop-down arrow and select the value that indicates the general reason for the change order. **(PLMO)**
10. In the **Author** field, note that your user ID has been recorded as the person creating this change order. **(Leave default)**
11. In the **Change Order Discovery Date** field, enter a date, as needed.
12. In the **Number of Non-FA Participating Days** field, enter a number of days.
13. Click the **Save** button.
14. The **Explanations** field indicates the number of explanations associated to the change order, from the Change Order Explanations section in the lower part of the window.
15. The **Change Order Revision Number** field indicates the number of times the change order has been rejected, changed to draft, and progressed to pending approval.
16. The **Approval Date** field indicates the date the change order was approved, when applicable.
17. The **Entered By** field indicates the name of the person who added the record.

18. The **Entered Date** indicates the date and time the record was added.

19. The **Current Approval Round** field specifies the current round of approval that has been achieved for the change order.

20. The **Current Approval Group** field specifies the approval group corresponding to the current level of approval.

21. The **Override Approval Rules** field indicates whether standard approval rules are superseded for the change order.

22. The **Total of Previously Approved Change Orders** field indicates the total amount of all other change orders for this contract that have reached approval status.

23. The **Functions** sections indicates the kind of changes you can make to the contract with a change order.

Maintaining a Contract Change Order

The Contract Change Order Summary lists all of the change orders for a contract, and contains all the information currently recorded in a change order.

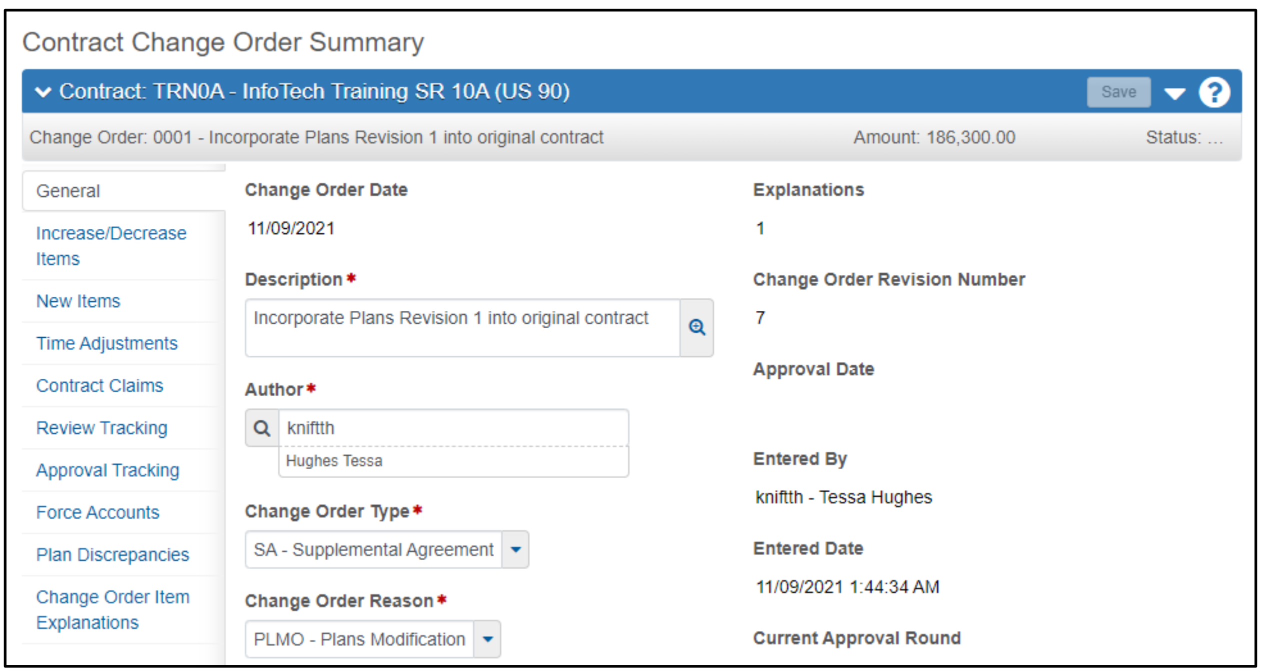


Figure 129. Contract Change Order Summary – General tab

Change Order Functions

Functions are the kind of changes you can make to a contract with a change order. The functions you can use in change orders are determined by FDOT. Change order functions include the following:

- Increase/Decrease Items
- New Items
- Time Adjustments
- Contract Modification Only
- Balance Completed Items
- Items Requiring Approval

As you record item or time entries on the other change order tabs, the system automatically identifies the appropriate functions included on the change order. You can include more than one of these functions in a change order, except when setting the final status and quantities for contract items, or when using the Contract Modification Only function.

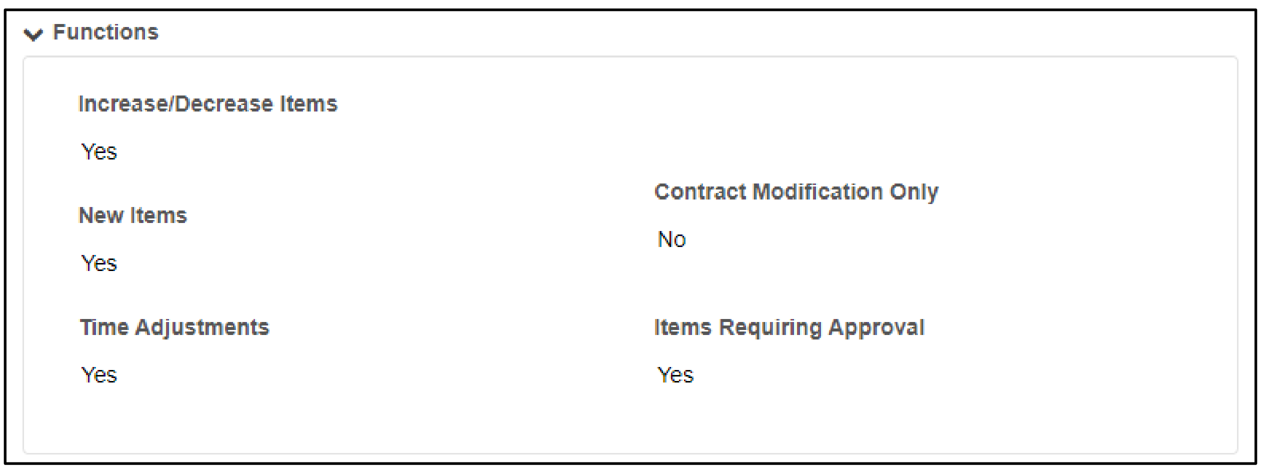


Figure 130. Change Order Functions

Change Order Explanations

Explanation information can be added for the change order in the Change Order Explanations section. The explanation you add can be chosen from a standard list of explanations developed by FDOT, or you can add your own non-standard explanation. The system enters a sequence number in the Order field, which can be changed.

Required fields are:

- Order

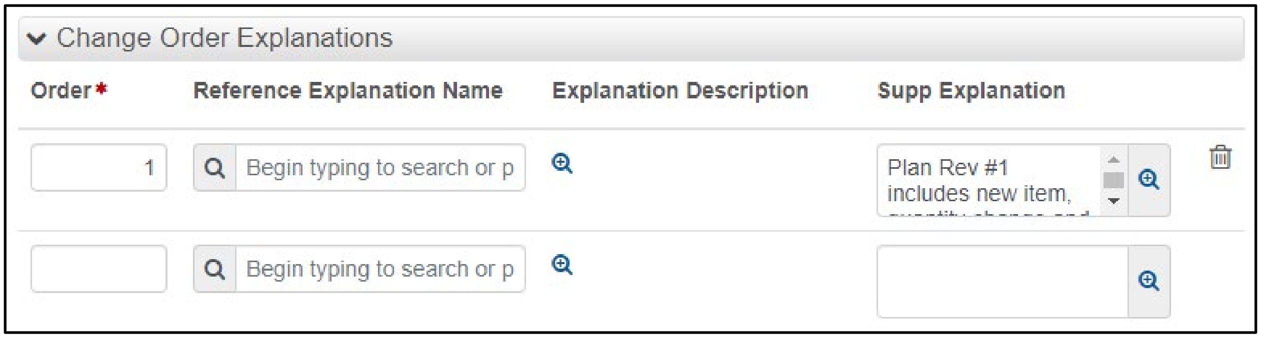


Figure 131. Change Order Explanations

Instructions 131

Navigation: Construction > Contract Change Order Summary > Change Order Explanations section

To add an explanation to a change order:

1. In the **Change Orders Explanation** section, in the **Order** field, type the value. **(1)**
2. In the **Reference Explanation Name** field, search for and select the standard explanation to add to the change order, if applicable. **(Leave blank)**
3. In the **Supp Explanation** field, enter any additional, non-standard explanation to add to the change order, if applicable. **(Plan Rev #1 includes new item, quantity change and time adjustment)**
4. Click the **Save** button.

Changing Item Quantities with a Change Order

Sometimes during the course of construction on an agency project, there may be a need to increase or decrease the quantity of a work item that was approved in the executed contract. The Increase/Decrease Items tab contains a row for each item quantity being changed on this change order.

The rows are divided into two sections, one for general quantity changes on items that are not completed in the project and the other for quantity changes needed to balance completed items.

Increasing and Decreasing Item Quantities

Required fields are:

- Quantity

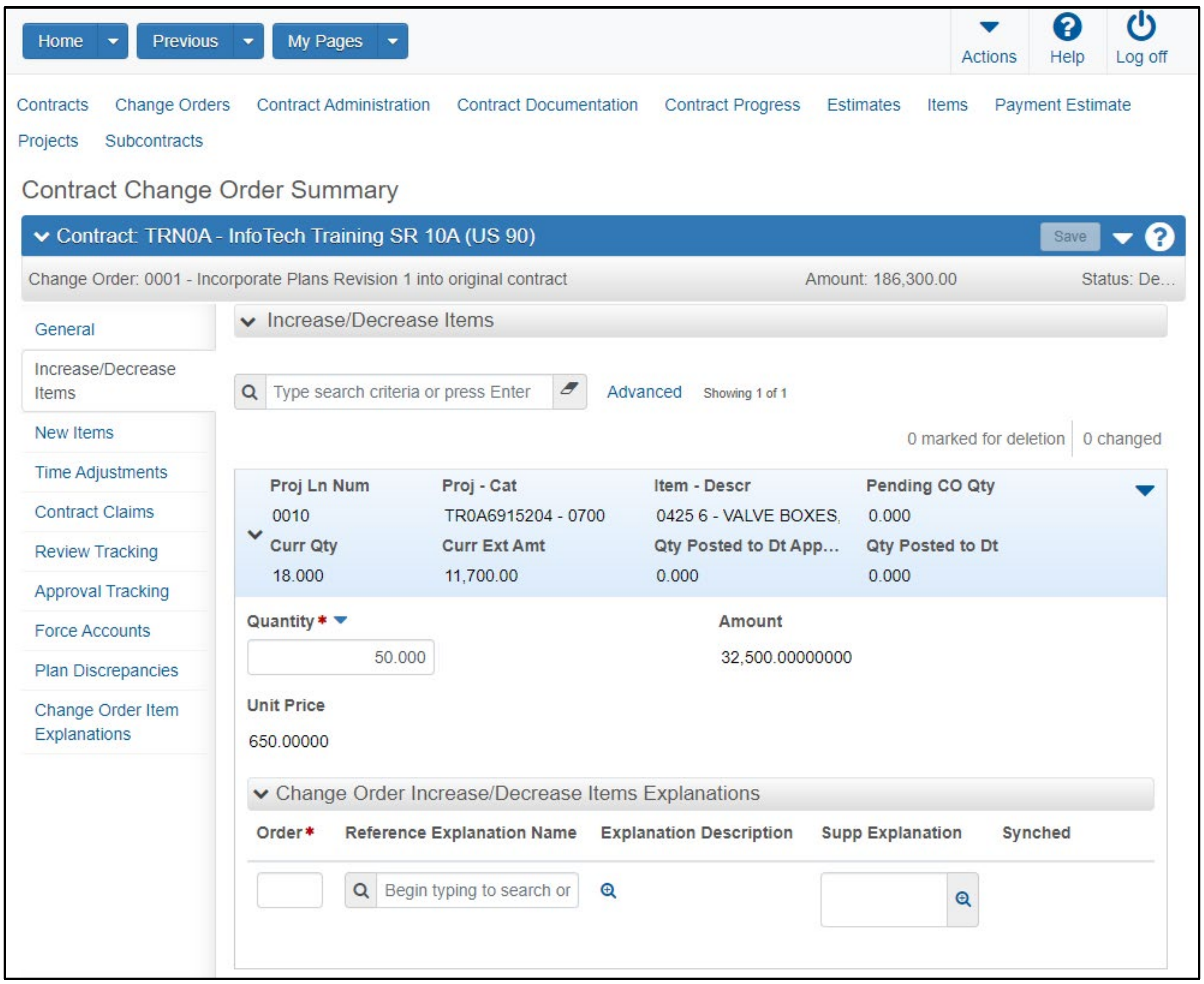


Figure 132. Contract Change Order Summary – Increase/Decrease Items tab

Instructions 132

Navigation: Construction > Contract Change Order Summary > Increase/Decrease Items tab

To increase or decrease item quantities on a change order:

1. Click the **Increase/Decrease Items** tab.
2. In the **Increase/Decrease Items** section, click the **Select Items** button.
3. Search for and select the item(s) to change. **(VALVE BOXES)**
4. Click the **Add to Change Order** button.
5. In the **Quantity** field, enter the change to the approved quantity for the contract project item. **(50)**
6. In the **Change Order Increase/Decrease Items Explanations** section, enter the order, standard and/or non-standard explanations for the item, as appropriate. (Order: **1,** Supp Explanation: **Increase quantity by 50)**
7. Click the **Save** button.

Adding New Items to a Contract with a Change Order

Sometimes during the course of an agency construction project, the contractor will need to complete items of work that were not included in the executed contract. This is one of the most common reasons for creating a change order. Any kind of item can be added to the contract on a change order, including new reference items, and contract items.

Note: Each item on a change order can have up to three item sources: one each on the change order, the contract item, and the contract project item.

Note: New items cannot be posted to a DWR until the change order is approved.

Adding New Items

Required fields are:

- Item
- Project Item Line Number
- Contract Item Line Number
- Quantity

- Unit Price

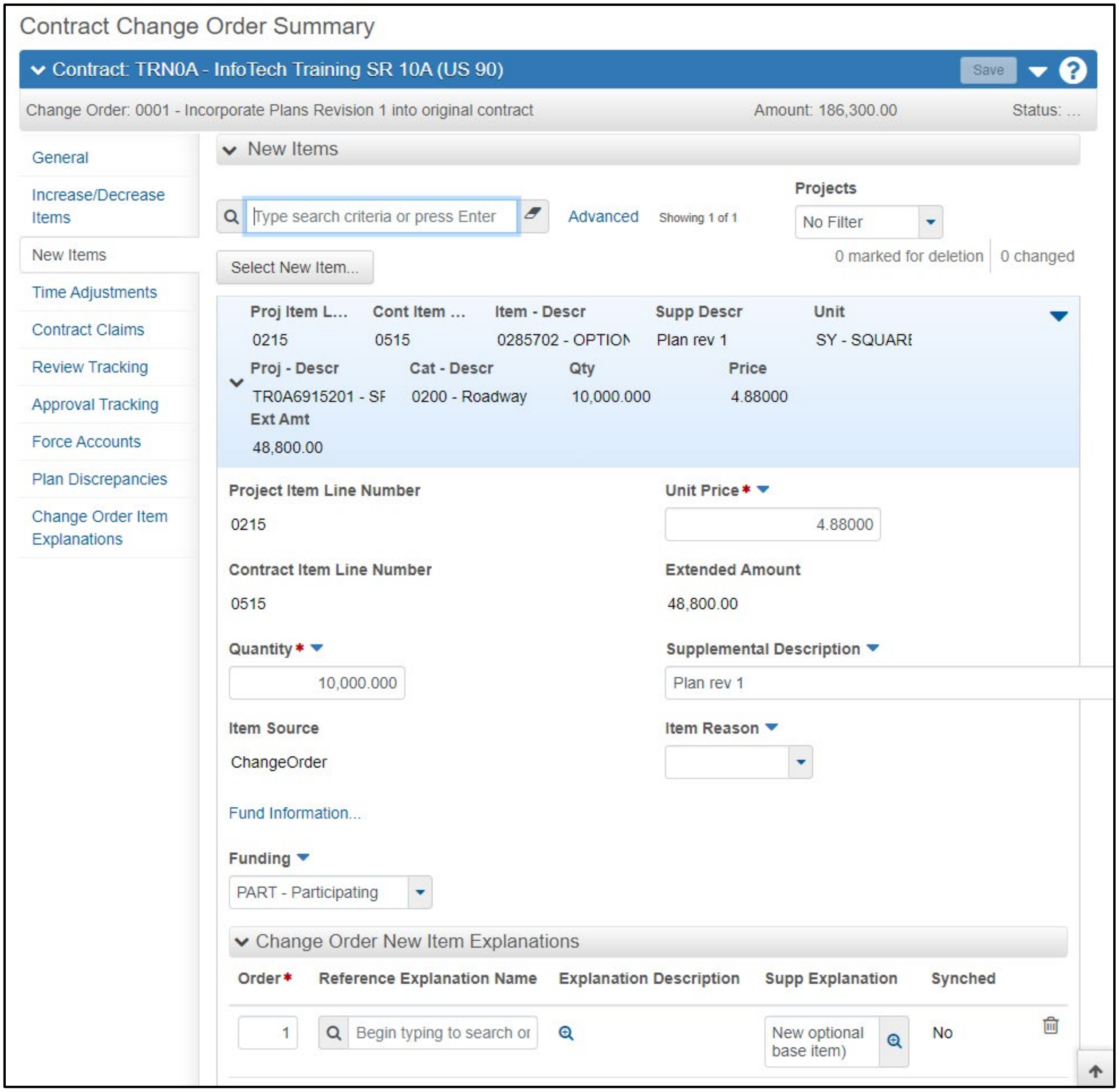


Figure 133. Contract Change Order Summary – New Items tab

Instructions 133

Navigation: Construction > Contract Change Order Summary > New Items tab

To add new items on a change order:

1. Click the **New Items** tab.
2. In the **New Items** section, click the **Select New Item** button.
3. In the **Reference Item** field, search for and select the item to add to the change order. **(0285702 – OPTIONAL BASE, BASE GROUP 02)**
4. Click the row for the project/category to which the item will be added. (Project: **TR0A6915201**, Category: **0200**, Category Description: **Roadway)**
5. Click the **Add to Change Order** button.
6. In the **Project Item Line Number** field, view the project item line number.

   Use the line numbers generated by the system.
7. In the **Contract item Line Number** field, view the contact item line number.

   Use the line numbers generated by the system.
8. In the **Quantity** field, enter the number of units of the item that are required. **(10,000)**
9. In the **Funding** field, click the drop-down arrow and select the identification name or number for the fund package. **(PART – Participating)**
10. In the **Unit Price** field, enter the unit price for the item at the contract project level. **(4.88)**
11. The **Extended Amount** field shows the extended amount for the new item on the change order after it is saved.
12. In the **Supplemental Description** field, enter an additional description for the item, if appropriate. **(Plan rev 1)**
13. In the **Item Reason** field, click the drop-down arrow and select the reason for adding the item.
14. In the **Change Order New Item Explanations** section, enter the order, standard and/or non-standard explanations for the item, as appropriate. (Order: **1,** Supp Explanation: **New optional base item)**
15. Click the **Save** button.

Modifying Contract Items

Contract items are items that are already associated with this contract, but need to be added to one or more additional projects.

Required fields are:

- Contract Item
- Project Item Line Number
- Quantity

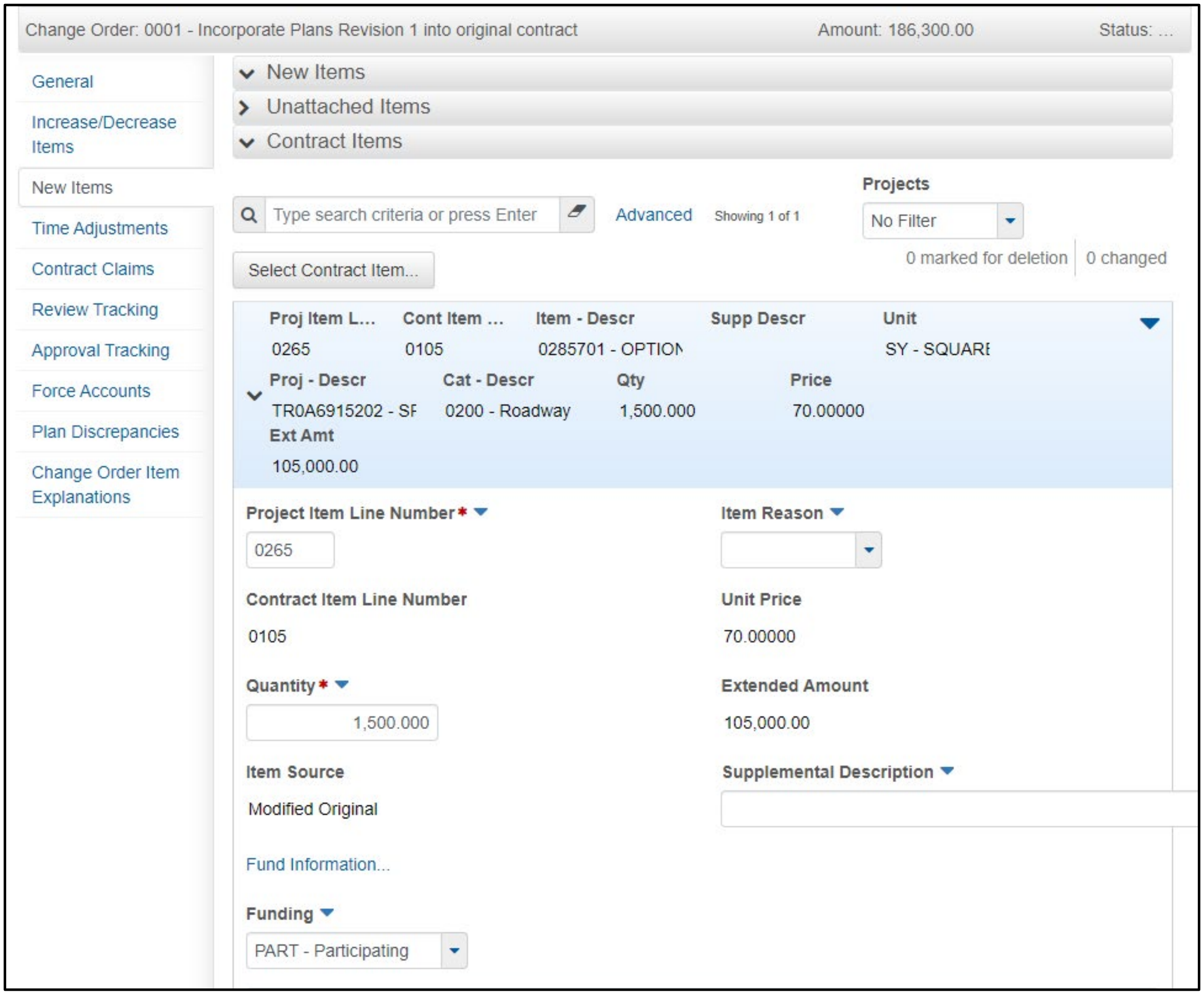


Figure 134. Contract Change Order Summary – New Items tab – Contract Items

Instructions

Navigation: Construction > Contract Change Order Summary > New Items tab > Contract Items section

To add new contract items on a change order:

1. In the **Contract Items** section, click the **Select Contract Item** button.
2. In the **Contract Item** field, search for and select the item(s) to add to the change order. **(OPTIONAL BASE)**
3. Click the row for the project/category to which the item will be added. (Project: **TR0A6915202** Category: **0200** Category Description: **Roadway)**
4. Click the **Add to Change Order** button.
5. In the **Project Item Line Number** field, verify or modify the project item line number.
6. The **Contract Item Line Number** field identifies the line item within the contract.
7. In the **Quantity** field, enter the number of units of the item that are required. **(1500)**
8. The **Item Source** field indicates where the contract item originated.
9. In the **Funding** field, click the drop-down arrow and select the identification name or number for the fund package. **(PART – Participating)**
10. The **Item Reason** field, click the drop-down arrow and select the reason for adding the item.
11. The **Unit Price** field indicates the price for the item at the contract proposal level.
12. The **Extended Amount** field indicates the extended amount for the new item on the change order.
13. The **Supplemental Description** displays additional information describing the entity.
14. In the **Change Order New Item Explanations** section, enter the order, standard and/or non-standard explanations for the item, as appropriate.
15. Click the **Save** button.

Adjusting Contract Time with a Change Order

A common reason for creating a change order is to adjust the completion date for a milestone or contract because work has fallen behind or been completed ahead of schedule. The Time Adjustments tab contains an accordion list of all the time adjustments that have been recorded in the change order.

If the Time Type for the adjustment is Available Time or Calendar Time, you can change the value in the Adjustment Time Units field. When you save the change, the system automatically recalculates the value in the Adjustment Completion Date field.

If the Time Type is Contract Time, you can change the Adjustment Completion Date field. When you save the change, the system automatically recalculates the value in the Adjustment Time Units field.

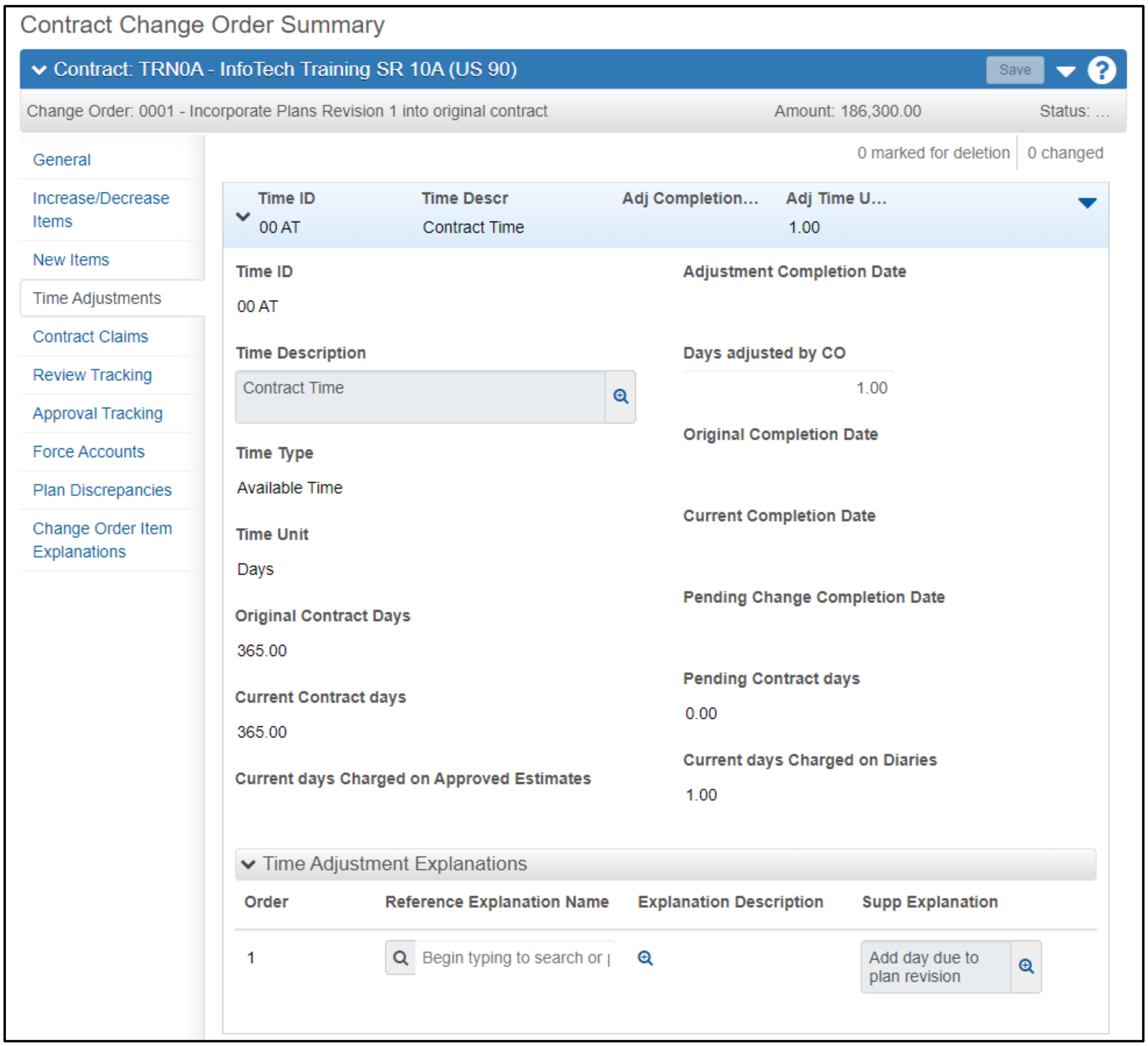


Figure 135. Contract Change Order Summary – Time Adjustments

Instructions 134

Navigation: Construction > Contract Change Order Summary > Time Adjustments tab

To add or change contract times on a change order:

1. Click the **Time Adjustments** tab.
2. Click the **Select Contract Time** button.
3. Search for and select the contract time records to adjust. **(00 AT)**
4. Click the **Add Time Adjustments to Change Order** button.
5. In the **Days Adjusted by CO** field, enter the number of time units to add or remove from the associated contract time on this change order. **(1)**
6. In the **Time Adjustment Explanations** section, enter the order, standard and/or non-standard explanations for the item, as appropriate. (Order: **1** Supp Explanation: **Add day due to plan revision)**
7. Click the **Save** button.

Managing Change Order Reviews

Adding Reviewers for a Change Order

Prior to starting the change order approval process, you can send the change order for review by multiple reviewers. The change order must be in Draft or Pending Review status in order to be reviewed.

The Review Tracking tab on the Contract Change Order Summary allows you to add or cancel reviewers for the change order, and lists all the review comments for the change order. Comments are listed by reviewer name.

Note: The system will allow FDOT personnel to approve a change order with incomplete reviews.

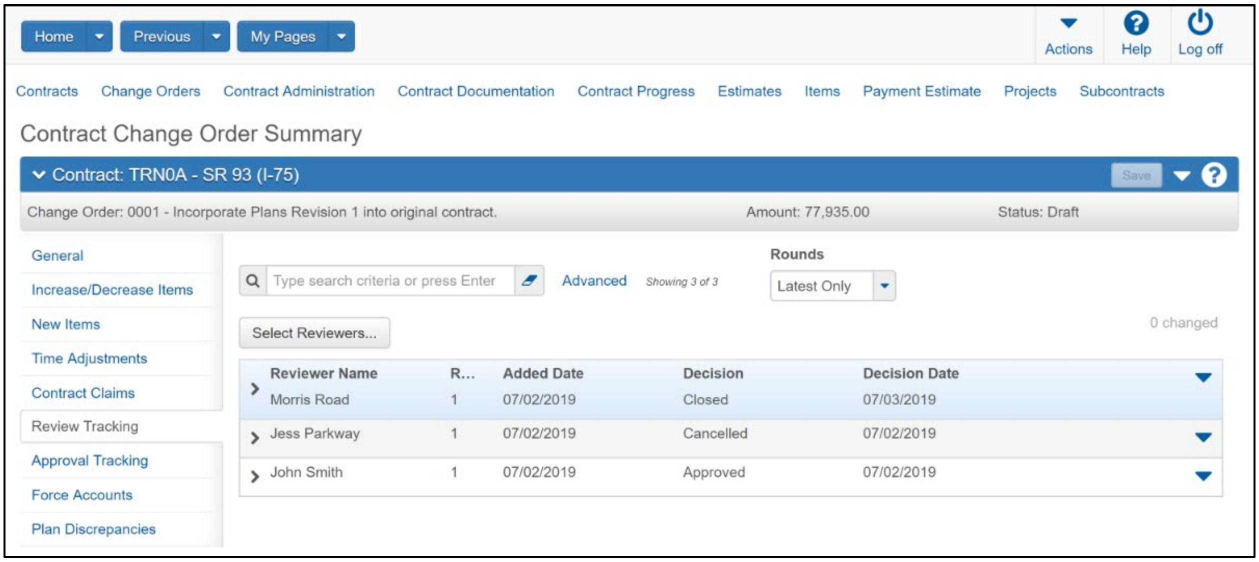


Figure 136. Contract Change Order Summary – Review Tracking tab

Instructions 135

Navigation: Construction > Contract Change Order Summary > Review Tracking tab

To add a reviewer for a change order:

1. Click the **Review Tracking** tab.
2. Click the **Select Reviewers** button.
3. Search for and select the reviewer(s) to add to the change order. **(Select yourself and any other username)**
4. Click the **Save** button.
5. Click the expand arrow for the row to see the reviewer's decision, decision date and comments after they have reviewed the change order.

Reviewing a Change Order

You can review a change order only when it is in Pending Review status. When reviewing the change order, reviewers make their recommendations to either approve or reject the change order. Remember that the change order is still in the pending review status, so you are not actually approving or rejecting the change order itself.

Required fields are:

- Approval Decision Comments

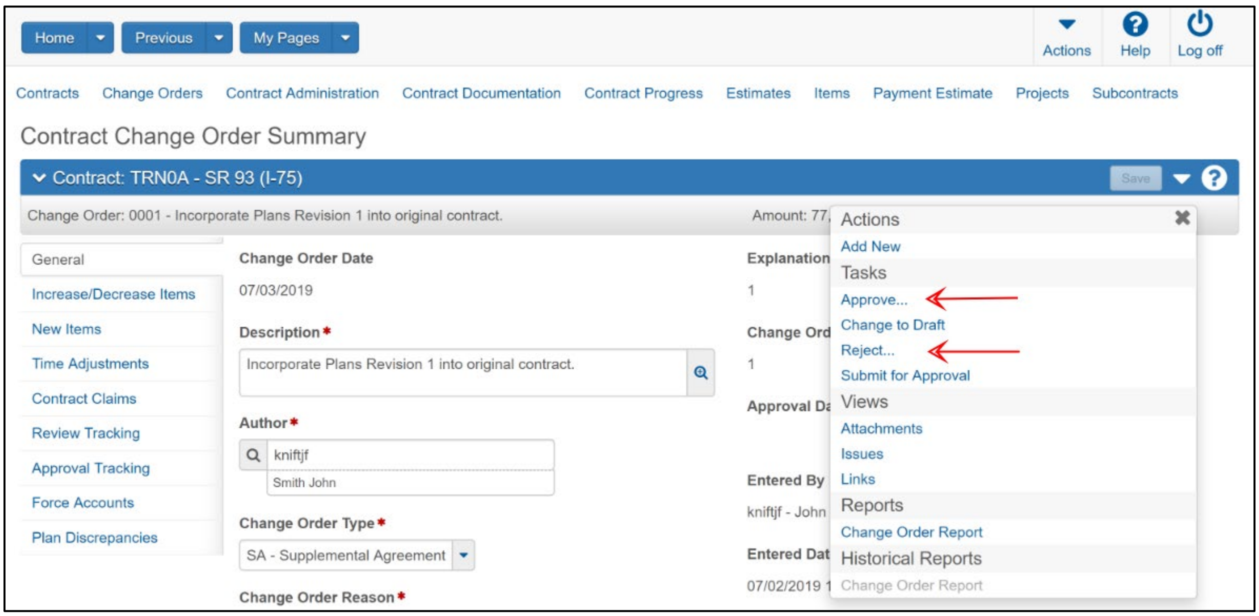


Figure 137. Contract Change Order Summary – Review Approve/Reject Tasks

Instructions 136

Navigation: Construction > Contract Change Order Summary > Review Tracking tab

To approve or reject the review of a change order and enter comments:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCCenOffAdmin)**
2. In the **Contract Change Order Summary**, click the component **Actions** button.
3. To approve the review of the change order, select the **Approve…** task. **(Select this option)**
4. To reject the review of the change order, select the **Reject…** task. **(SKIP)**

5. In the **Approval Decision Comments** field, enter a comment about the decision to approve or reject the change order. **(Review complete)**

6. Click the **Save** button.

Managing Change Order Approvals

A contract change order must be approved by FDOT personnel at several levels before the changes become part of the contract. FDOT determines a default structure for how many levels of approval are required for each change order type, at what stage each approval should take place, and which FDOT or non-agency user group has authority to approve each change order at each approval level.

Assigning Default Approval Groups to the Change Order

You can assign default approval groups to the change order based on the definition of the change order, the contract type, and the reference change order approval rules defined in the system. Before the system allows you to submit a change order for approval, at least one approval group must be assigned to the change order, and any group marked as a Minimum group that would be assigned as a default approval group is also required. If you submit the change order for approval before approval groups have been assigned to the change order, the system automatically adds the default approval groups before changing the change order's status to *Pending Approval*.

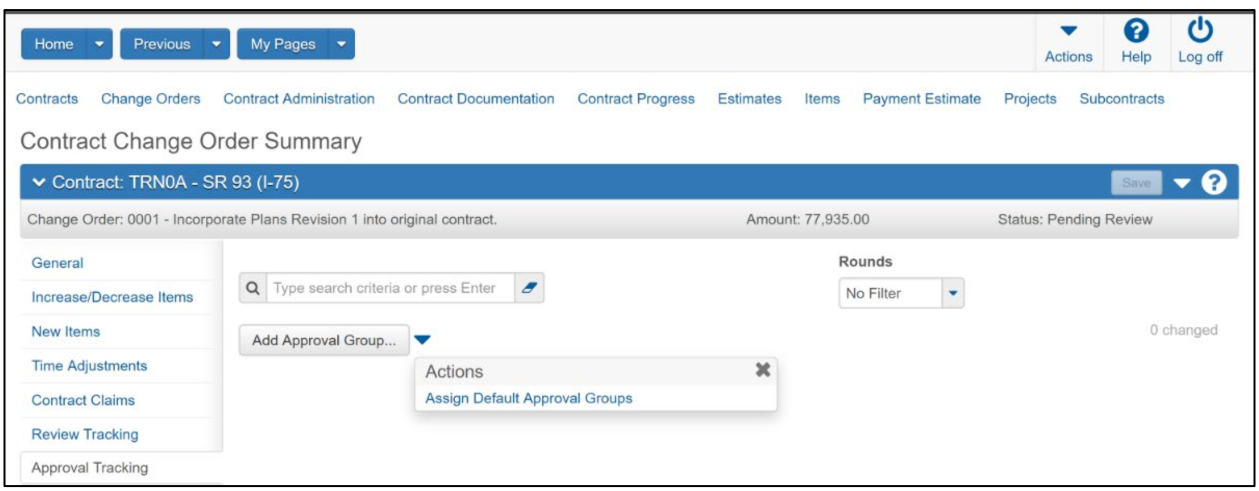


Figure 138. Contract Change Order Summary – Assign Default Approval Groups

Instructions 137

Navigation: Construction > Contract Change Order Summary > Approval Tracking tab

To add approval groups to a change order:

1. Click the **Home** drop-down arrow and verify the correct role is selected. (**PrCCenOffAdmin**)
2. Click the component **Actions** button. Click the **Change to Draft** task.
3. Click the **Approval Tracking** tab.
4. Click the list **Actions** button and select the **Assign Default Approval Groups** action.
5. Review the assigned approval groups.

Submitting a Change Order for Approval

When the change order is deemed ready, it must be submitted for approval to begin the approval processes.

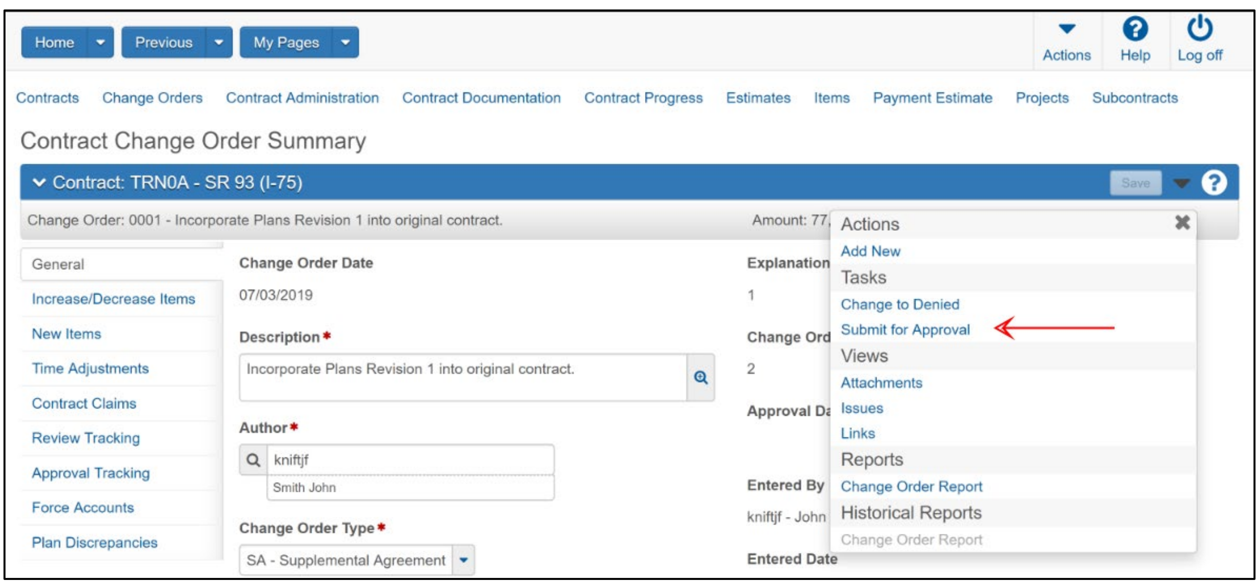


Figure 139. Contract Change Order Summary – Submit for Approval

Instructions 138

Navigation: Construction > Contract Change Order Summary

To submit a change order for approval:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCRCSS)**

2. On the **Contract Change Order Summary** for the appropriate change order, click the component **Actions** button, and select the **Submit for Approval** task.

   Note that the status has changed to Pending Approval

Approving a Change Order

Required fields are:

- Approval Decision Comments

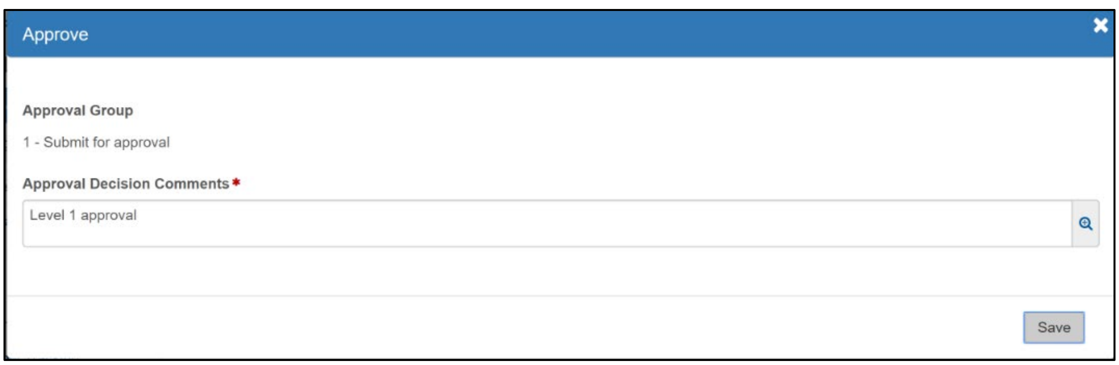


Figure 140. Approving a Change Order

Instructions 139

Navigation: Construction > Contract Change Order Summary > Approval Tracking tab

To approve a change order:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCDistOffEng)**

2. Click the component **Actions** button and select the **Approve** action.

3. In the **Approval Decision Comments** field, enter a comment about the decision to approve the change order. **(Level 1 approval)**

   Note how the approval group is specified on the modal.

4. Click the **Save** button.

Rejecting a Change Order

Required fields are:

- Approval Decision Comments

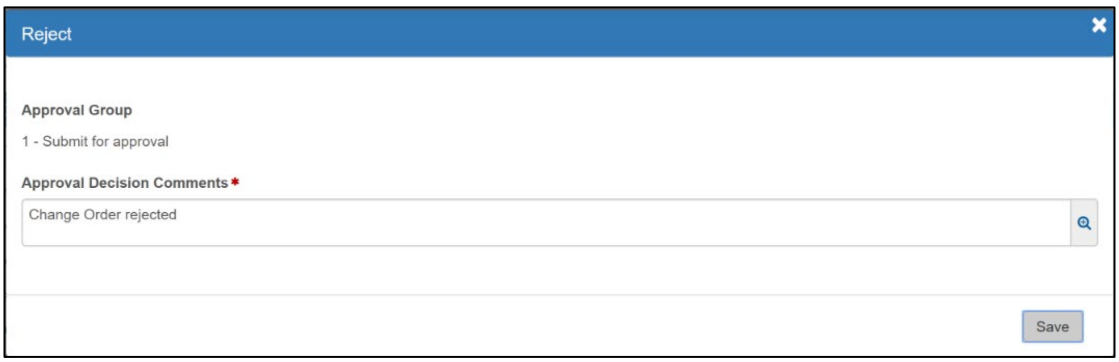


Figure 141. Rejecting a Change Order

Instructions 140

Navigation: Construction > Contract Change Order Summary > Approval Tracking tab

To reject a change order:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCDistOffEng)**

2. Click the component **Actions** button and select the **Reject** action.

3. In the **Approval Decision Comments** field, enter a comment about the decision to reject the change order. **(Change Order rejected)**

   Note how the approval group is specified on the modal.

4. Click the **Save** button.

5. Click the component **Actions** button and select the **Change to Denied** action.

Note the status updated to Denied.

Tracking Approvals for a Change Order

The Approval Tracking tab on the Contract Change Order Summary contains an accordion list of approval records for the change order, sorted by round and approval group.

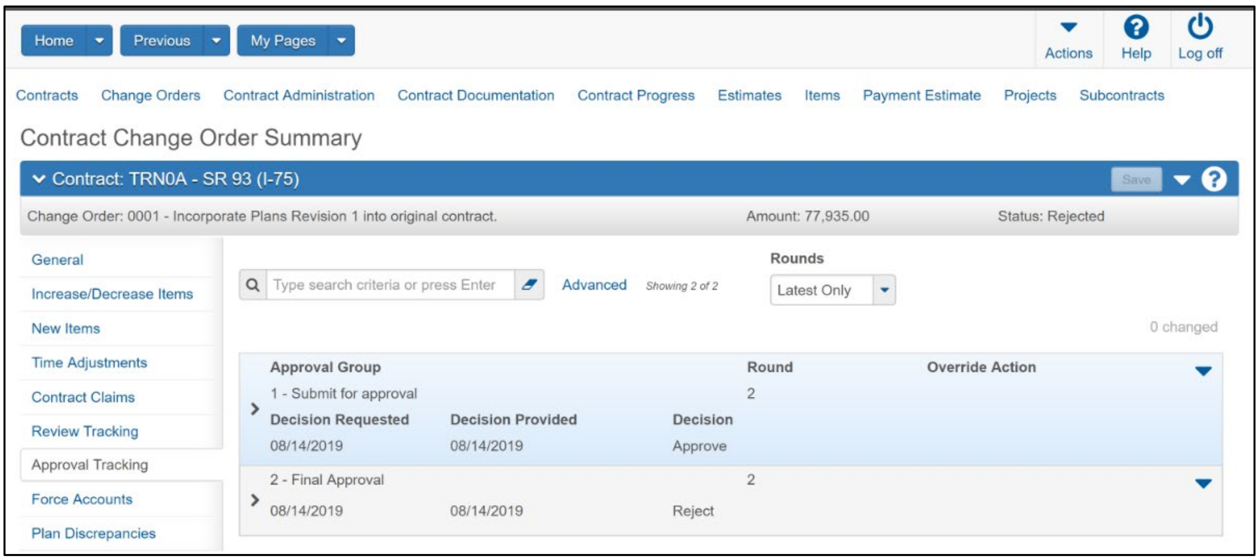


Figure 142. Contract Change Order Summary – Approval Tracking tab

Instructions 141

Navigation: Construction > Contract Change Order Summary > Approval Tracking tab

To track the approvals on a change order:

1. Click the **Approval Tracking** tab.
2. Click the expand arrow for the approval group to view.
3. View the information.

Generating the Change Order Report

The Change Order Report contains all of the information about the selected change orders, including descriptions of the changes, contract and project line-item details for each change, and any recorded explanations. The report includes detailed information about item quantity increases and decreases, new items, time adjustments, change order dollar amounts, and approvals.

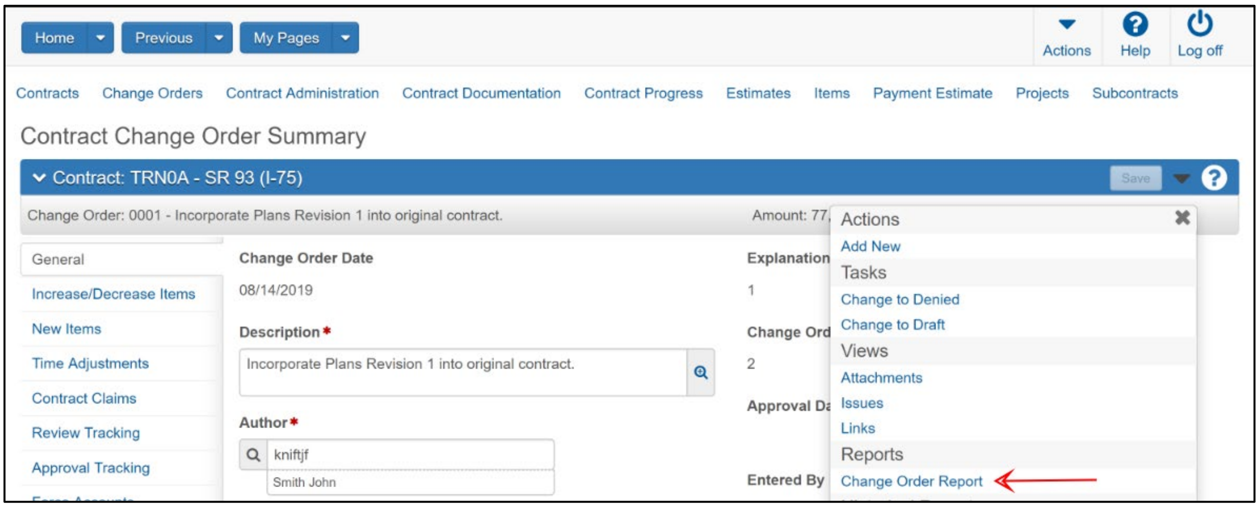


Figure 143. Generating the Change Order Report

Instructions 142

Navigation: Construction > Contract Change Order Summary

To view change order reports:

1. Click the component **Actions** button
2. From the **Reports** section, select the **Change Order Report**.
3. Select the **Output Type**. **(Generate as PDF)**
4. Select the **Report Layout Source. (Custom)**
5. Click the **Execute** button.
6. Close the report.
7. Click the **Home** button.

Closing a Contract

In AASHTOWare Project Construction & Materials, designated FDOT personnel can close the contract record at the end of the contract. Before you close a contract, verify all daily work reports, payment estimates, and change orders have been approved, and verify all necessary actual completion dates have been recorded. If needed, designated FDOT personnel can reopen a closed contract.

Once a contract has been closed, the system will continue to allow updates to Payment Estimate Accounting Data for on the Contract Payment Estimate Summary component and the Payment Estimate Accounting Overview Component.

In AASHTOWare Project Construction & Materials, designated FDOT personnel can archive a closed contract. System roles can be configured to restrict user access to archived contracts. If needed, designated FDOT personnel can un-archive a closed contract.

Please note that depending on the roles you are assigned, you may not have access to all the functionality shown in this training guide.

Note: You can close a contract at any point during the duration of a contract. However, if a contract time is required for a closed contract, you must record the Actual Completion date before the system will allow you to close the contract.

Instructions 143

Navigation: Construction > Contract Administration Summary > General tab

To verify a contract is ready to be closed:

1. Click the **Home** drop-down arrow and verify the correct role is selected. (**PrCFinalEstStaff**)
2. From the **Construction** component, select the **Contract Administration** link.
3. Search for and select the contract to review. **(TRNXX,** where XX is your assigned contract number**)**
4. Click the **Contract ID** link.
5. Click the **Contract Progress** quick link at top of window.
6. Click the **Daily Works Reports** tab and verify all Daily Work Reports are approved. **(Approve the Draft DWR)**

   Suggested filter: DWR Status – Does Not Contain – Approved.
7. Click the **Payment Estimates** tab and verify all Payment Estimates are approved.

   Suggested filter: Status – Does Not Contain – Approved.
8. Click the **Change Orders** tab and verify all Change Orders are approved/denied/void.

   Suggested filter:
   Status – Does Not Contain – Approved,
   Status – Does Not Contain –Denied,
   Status – Does Not Contain – Void.
9. Click the **Contract Administration** quick link at top of window.
10. Click the **Contract Times** tab and verify all necessary actual completion dates have been recorded in the Site Times section, Informational section, and Recurring section.

    In training, in the **Site** section, click the **00 AT** Time ID link.
    On the **General** tab, in the **Required For** field, note the selected value is **Close Contract**.
    On the **Units and Dates** tab, in the **Actual Completion** field, enter the completed date: **Today's Date and Time**.

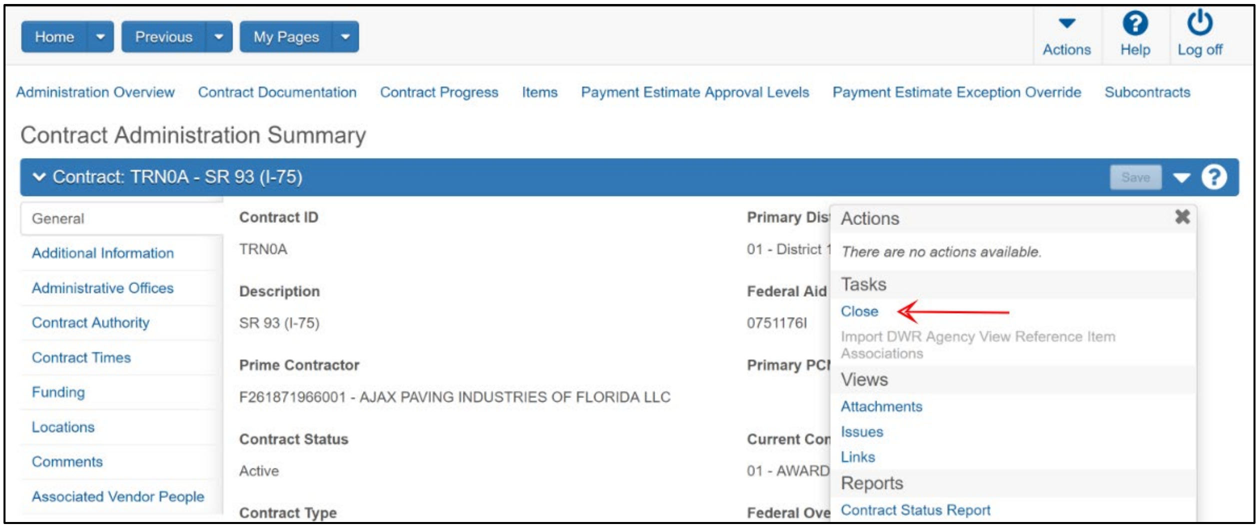


Figure 144. Closing a Contract – Close task

Instructions 144

Navigation: Construction > Contract Administration Summary > General tab

To close a contract:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCFinalEstStaff)**
2. From the **Construction** component, select the **Contract Administration** link.
3. Search for and select the contract to activate. **(TRNXX,** where XX is your assigned contract number**)**
4. Click the **Contract ID** link.
5. Click the component **Actions** button and select **Close**.
6. In the **Comments** field, enter comments about the closed contract. **(Work completed)**
7. Clicked the **Save** button.

   The system displays a confirmation message that the contract was successfully closed.

8. Verify the **Contract Status** field contains the **Closed** value.
9. Click the **Comments** tab and view the comment you entered.

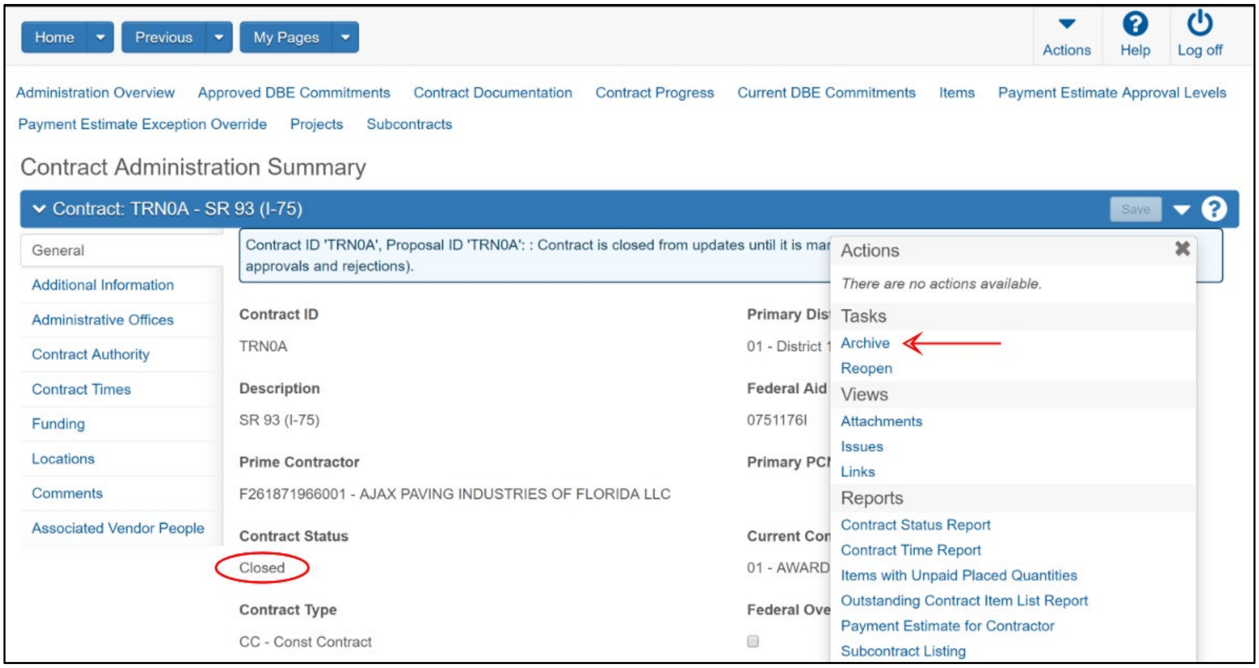


Figure 145. Closing a Contract – Archive task

Instructions 145 – Outside of Training

Navigation: Construction > Contract Administration Summary > General tab

To archive a contract:

1. Click the **Home** drop-down arrow and verify the correct role is selected.
2. Click the component **Actions** button and select **Archive**.

   The system displays a confirmation message that the contract was successfully archived.

3. Verify the **Contract Status** field contains the **Archived** value.

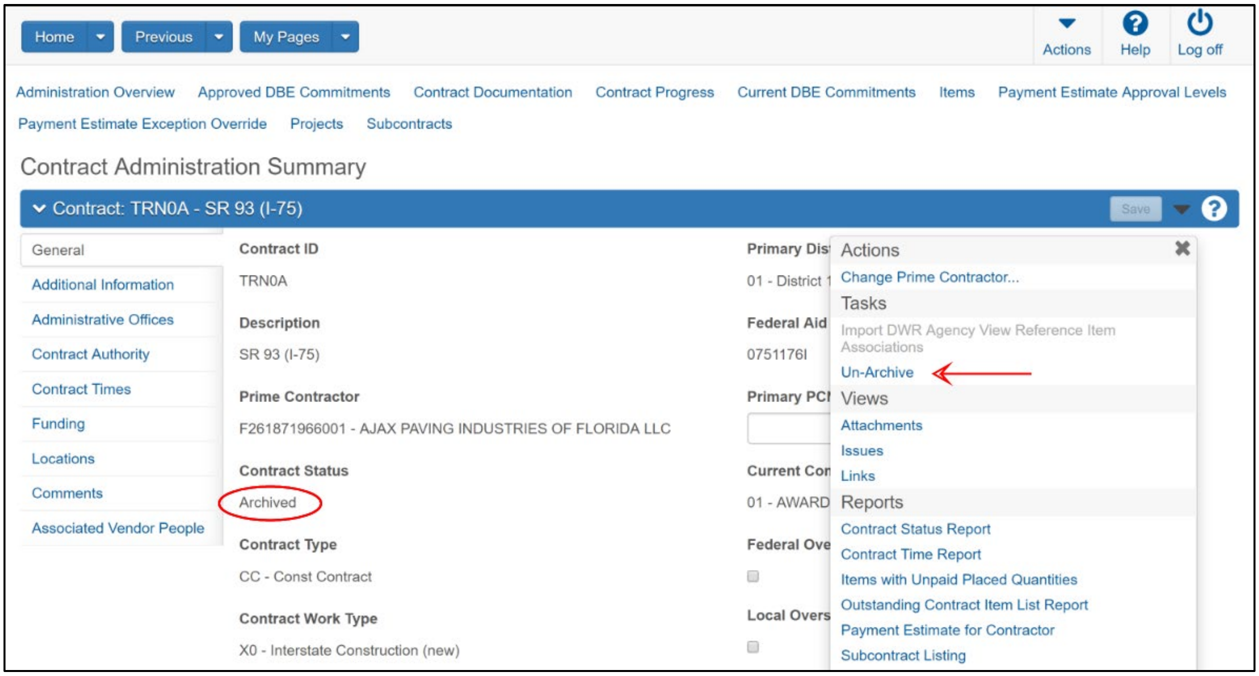


Figure 146. Closing a Contract – Un-Archive task

Instructions 146 – Outside of Training

Navigation: Construction > Contract Administration Summary > General tab

To un-archive a contract:

1. Click the **Home** drop-down arrow and verify the correct role is selected.
2. Click the component **Actions** button and select **Un-Archive**.

   The system displays a confirmation message that the contract was successfully unarchived.

3. Verify the **Contract Status** field contains the **Closed** value.

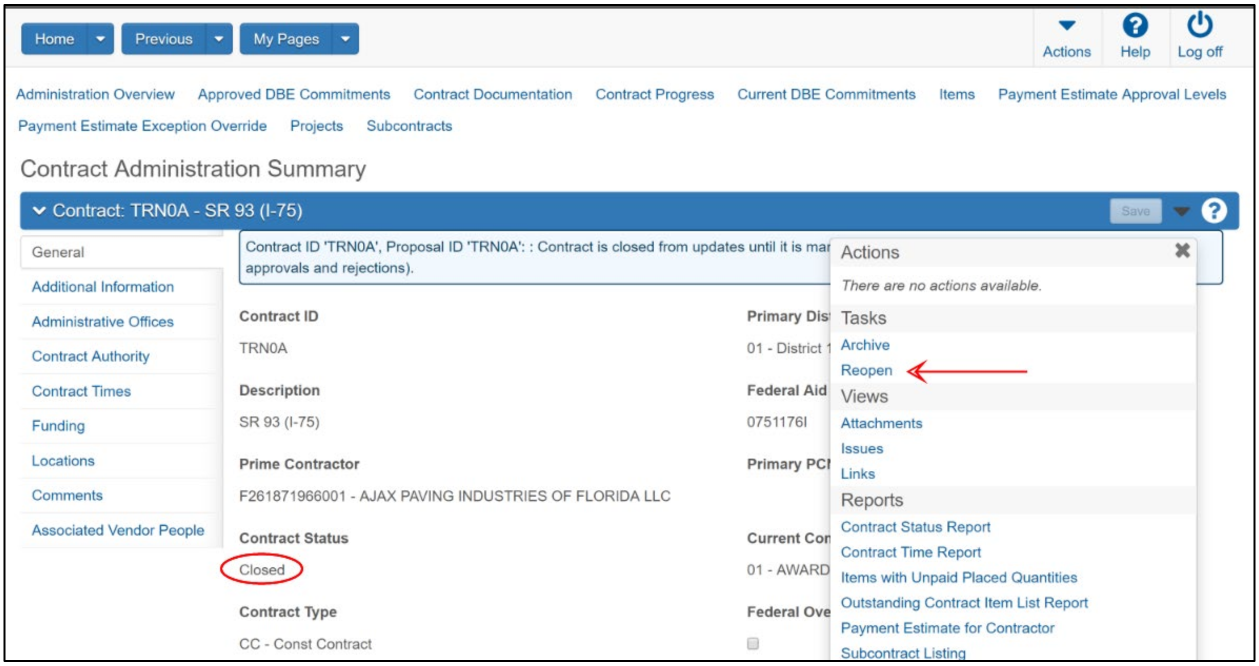


Figure 147. Closing a Contract – Reopen task

Instructions 147

Navigation: Construction > Contract Administration Summary > General tab

To reopen a contract:

1. Click the **Home** drop-down arrow and verify the correct role is selected. **(PrCFinalEstStaff)**
2. Click the component **Actions** button and select **Reopen**.
3. In the **Comments** field, enter comments about the closed contract. **(Supplemental work needed)**
4. Clicked the **Save** button.

   The system displays a confirmation message that the contract was successfully reopened.

5. Verify the **Contract Status** field contains the **Active** value.
6. Click the **Comments** tab and view the comment you entered.

Appendix

Setting Up Additional Browsers Other Than Google Chrome

Web-based AASHTOWare Project is designed to run on Google Chrome, Microsoft Edge, and Internet Explorer version 11 (IE11). If you are using Internet Explorer, make sure you update your browser to this version.

Setting the Browser Mode in Internet Explorer

If you will use Internet Explorer, after you complete this training and before you use web-based AASHTOWare Project on your own computer, please refer to this topic in the user's guide and set your browser mode.

Instructions 1

To ensure the browser mode is properly set:

1. Open the **Internet Explorer** browser.
2. Press the **Alt** key to display the toolbar.
3. From the **Tools** menu, select **Compatibility View Settings**.
4. In the Compatibility View Settings window, clear the **Display intranet sites in Compatibility View** check box.
5. Click the **Close** button.

Setting Internet Options in Internet Explorer

If you will use Internet Explorer, after you complete this training and before you use web-based AASHTOWare Project on your own computer, please refer to this topic in the user's guide and set your internet options and enable your Data Object Model (DOM) storage.

Note: If the system does not display icons properly, perform one of the following actions:
- Set the Internet Explorer option for Font Download to Enable for the Internet security zone.
- Add the AASHTOWare Project website to the list of Trusted Sites.

Instructions 2

To ensure the browser internet options are properly set and that the DOM storage is enabled:

1. Open the **Internet Explorer** browser.
2. Navigate to the **Tools** menu, and select **Internet Options**.
3. Under **Browsing History**, click the **Settings** button.
4. For the **Check for newer versions of stored pages** setting, click the **Every time I visit the webpage** option.
5. Click the **OK** button.
6. In the **Internet Options** dialog box, click the **Advanced** tab.
7. In the **Settings** box, scroll down to the **Security** section, and ensure the **Enable DOM Storage** option is selected.
8. Click the **OK** button.

Configuring Browser Settings for Microsoft Edge

For user interface elements to be displayed properly in Microsoft Edge, settings for touch and mouse events must be configured correctly.

Instructions 3

To verify or update the settings in your Microsoft Edge browser:

1. Open the **Microsoft Edge** browser.
2. In the **address** bar, type **about: flags**.
3. In the **Standards Preview** section, ensure that the **Enable touch events** field is set to either **Always on** or **Only on when a touchscreen is detected**.
4. If you made changes, close the browser to allow the changes to take effect.

Entering Data in a Range of Fields

The Range Fill feature provides a quick way to copy the same value to the same field on multiple rows of a list. For example, if you are granting contract authority to a number of people on a contract, you can add each person and then use range fill to enter the same role or effective date for all of them at one time.

Fields that allow range fill are determined by FDOT and are identified by a gray down arrow beside the field's label.

Note: Rows with fields that are read-only are included in the count but skipped in the range fill.

Instructions 4

To use the range fill feature:

1. Navigate to the appropriate overview or summary window.
2. Select a row and field containing the value you want to copy to a range of fields.
3. Click the **Range Fill** button (blue down arrow) on the field containing the value you want copy.

   The system opens the Range Fill overlay. You can also open the Range Fill overlay by clicking in or tabbing to the field and then pressing ALT+1.

4. In the **Rows** field, type the number of rows you want in the range to be filled, up to the total number of rows displayed.
5. If the range you want filled extends downward from the selected field, select the **Down** option, or if the range extends upward, select the **Up** option.
6. Alternatively, you can select a check box to copy the value to the field in all of the rows displayed in the component or all of the rows in the list.
7. Click the **Fill** button to fill the range of fields with the copied value.
8. To close the overlay without filling the range of fields, click the **Close** button

   The system copies the value to the specified range of fields and displays an Undo button beside each field populated with the range fill. Click the Undo button on any range filled field to revert to its previous value.

Contract Change Tracking System

The FDOT Contract Change Tracking System will not be covered in this training.

Associating a DWR agency view to a Contract Item

Instructions 5

Navigation: Construction > Contract Administration > Contract Administration Summary > Items

To associate a DWR agency view to a Contract Item:

1. Click the **Items** quick link.
2. Search for and select the contract line number needing a DWR agency view association.
3. Click the row **Actions** button for the contract line number.
4. From the Tasks section, select **DWR Agency View Contract Item Association**.
5. On the DWR Agency View Contract Item Association Overview, click the **Select DWR Agency View Reference Item Associations** button.
6. Type criteria in the Quick Find search box to locate the agency view you want to add to the contract item.

7. Click the row for the association you want to add.
8. Click the **Add to Contract** Item button.
9. In the **Effective Date** field, enter the date the agency view becomes effective.
10. In the **Status** field, click the drop-down arrow and select the status of the DWR agency view contract item association.
11. Click **Save**.

Tracking Contract Actions

Note: This section is for Central Office only.

Contract Actions are legal claims managed solely by the FDOT central office. This type of legal claim is processed separately and is not related to contract claims that originate in the field.

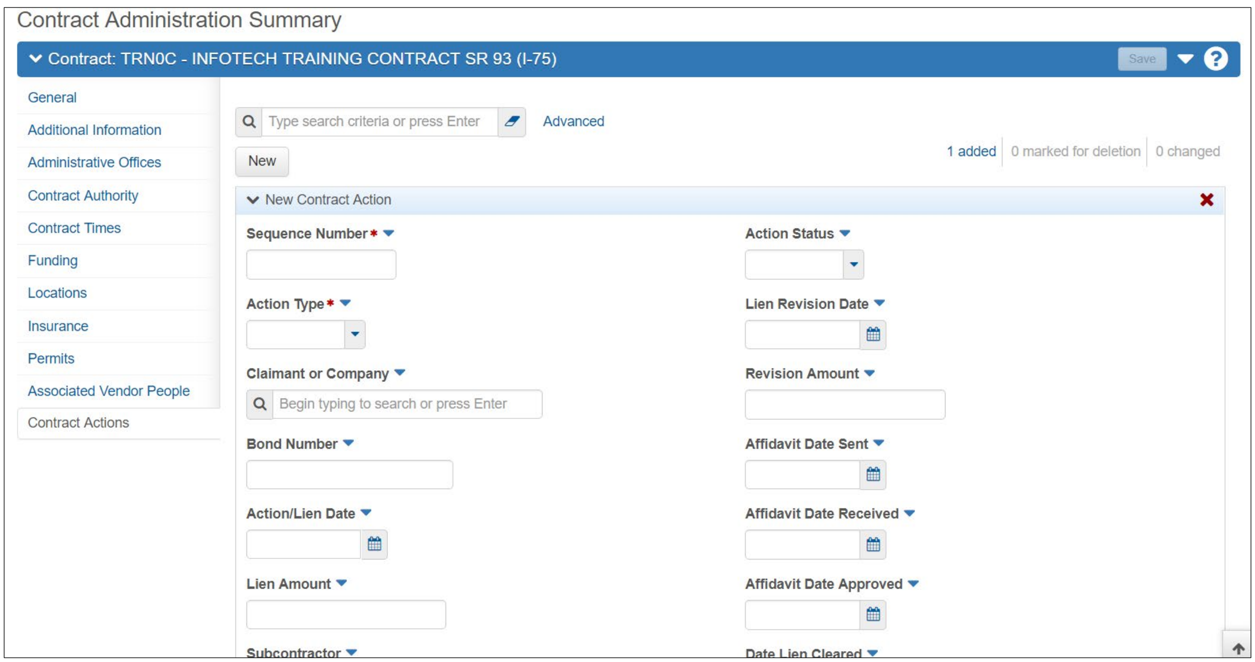


Figure 148. Contract Administration Summary – Contract Actions Tab

Instructions 6

Navigation: Construction > Contract Administration Summary > Contract Actions tab

To view how to track information on the Contract Actions tab:

1. Click the **Contract Actions** tab.

   Prior to activation, there are no contract actions to review. In training, you will view the available fields in a New Contract Action row.

2. Click the **New** button.
3. In the **Sequence Number** field, you would enter a unique number for the action.
4. In the **Action Type** field, you would click the drop-down arrow and select the appropriate option.
5. In the **Claimant or Company** field, you would search for and select the person or company who made the claim associated with this contract action.
6. In the **Bond Number** field, you would enter the bond number associated with this contract action.
7. In the **Action/Lien Date** field, you would enter the date of the contract action or its associated lien.
8. In the **Lien Amount** field, you would enter the amount of the lien associated with this contract action.
9. In the **Subcontractor** field, you would search for and select the subcontractor associated with this contract action, if appropriate.
10. In the **Bonding Agent** field, you would search for and select the bonding agent company associated with this contract action, if appropriate.
11. In the **Comments** field, you would enter any appropriate comments associated with this contract action.
12. In the **Action Status** field, you would click the drop-down arrow and select the appropriate option.
13. In the **Lien Revision Date** field, you would enter the date a revision was made on the lien associated with this contract action.
14. In the **Revision Amount** field, you would enter the amount of a revision made on the lien associated with this contract action.
15. In the **Affidavit Date Sent** field, you would enter the date an affidavit associated with this contract action was sent.

16. In the **Affidavit Date Received** field, you would enter the date an affidavit associated with this contract action was received.
17. In the **Affidavit Date Approved** field, you would enter the date an affidavit associated with this contract action was approved.
18. In the **Date Lien Cleared** field, you would enter the date the lien associated with this contract action was cleared.
19. The **Created By** field displays the name of the person who added this record to the system.
20. The **Created Date** field displays the date and time this record was added in the system.
21. The **Last Updated By** field displays the name of the person who most recently changed this record.
22. The **Last Updated Date** field displays the date and time this record was most recently changed.
23. In training, do not click the **Save** button.

Managing Meetings

The Meetings tab contains a list of all the meeting records associated with the contract.

Adding a Meeting

The Add Meeting component enables you to create a new meeting record for a contract.

Required fields are:

- Meeting Title

Instructions 7

Navigation: Construction > Contract Administration > Contract link > Contract Documentation quick link

To access the Contract Documentation Summary:

1. Click the **Home** drop-down arrow and verify the correct role is selected.
2. From the **Construction** component, select the **Contract Administration** link.
3. Search for and select the contract.

4. Click the **Contract Documentation** quick link.

Instructions 8

Navigation: Construction > Contract Administration > Contract link > Contract Documentation quick link > Meetings tab

To add a meeting record:

1. Click the **Home** drop-down arrow and verify the correct role is selected.

   Implementation Note: *identify the roles that need access to this functionality and update those roles accordingly.*

2. Click the **Meetings** tab.

3. Click the **Add** button.

4. On the **Add Meeting** component, in the **Meeting Title** field, type the subject of the meeting.

5. Click the **Meeting Type** drop-down arrow and select the meeting type.

   Implementation Note: *Additional meeting types should be created.*

6. In the **Meeting Date** field, enter the date the meeting occurred.

7. Notice that the **Contract ID** field is automatically filled in and cannot be changed.

8. Click the Remarks **Type** drop-down arrow and select the remark type.

9. In the **Remark** field, type additional information.

10. Click the **Save** button.

    The system displays the Meeting Summary component.

Maintaining a Meeting Record

The Meeting Summary contains all of the information recorded about a meeting, including a list of attendees.

Viewing Meeting General Information

The Meeting Summary opens on the General tab.

Instructions 9

Navigation: Construction > Contract Administration > Contract link > Contract Documentation quick link > Meetings tab > Title link

To view general information on a meeting record:

1. From the **Meeting Summary** page, view the information on the **General** tab.

Adding Meeting Attendees

The Attendees tab on the Meeting Summary contains a list of attendees recorded for the meeting.

Required fields are:

- First Name
- Last Name

Instructions 10

Navigation: Construction > Contract Administration > Contract link > Contract Documentation quick link > Meetings tab > Title link > Attendees tab

To add attendees to a meeting record:

1. Click the **Attendees** tab.
2. Click the **New** button.
3. In the **Title** field, type the title of the attendee.
4. In the **First Name** field, type the first name of the attendee.
5. In the **Last Name** field, type the last name of the attendee.
6. In the **Organization** field, type the organization the attendee is associated with.
7. In the **Email Address** field, type the email address of the attendee.
8. In the **Phone Number** field, type the email address of the attendee.
9. Click the **Save** button.

*You can also click the list **Actions** button and select the **Select Attendees** action to select attendees from the Persons list.*

Managing Plan Discrepancies

A plan discrepancy is an inconsistency between the construction performed on a project and the intent of the contract plans and specifications. Information about plan discrepancies is recorded to aid the agency in assessing the impact on construction and addressing the discrepancy contractually.

On the Contract Documentation Summary, the Plan Discrepancies tab lists all the discrepancies that have been recorded for the contract.

Adding a Plan Discrepancy

The Add Plan Discrepancy component enables you to create a new plan discrepancy record for a contract.

Required fields are:

- Description

Instructions 11

Navigation: Construction > Contract Administration > Contract link > Contract Documentation quick link

To access the Contract Documentation Summary:

1. Click the **Home** drop-down arrow and verify the correct role is selected.
2. From the **Construction** component, select the **Contract Administration** link.
3. Search for and select the contract.
4. Click the **Contract Documentation** quick link.

Instructions 12

Navigation: Construction > Contract Administration > Contract link > Contract Documentation quick link > Plan Discrepancies tab

To add a plan discrepancy record:

1. Click the **Home** drop-down arrow and verify the correct role is selected.

   Implementation Note: *identify the roles that need access to this functionality and update those roles accordingly.*

2. Click the **Plan Discrepancies** tab.

3. Click the **Add** button.

4. In the **Contract Project ID** field, search for and select the ID.

5. In the **Description** field, type a description of the plan discrepancy.

6. Click the **Remarks** Type drop-down arrow and select the remark type.

   Implementation Note: *Remark Types would need to be set up if this functionality is utilized in the code table and then set up the remark configuration section to utilize these types for this entity. An example of a potential remark type could be Minor Plan Discrepancy.*

7. In the **Remark** field, type additional information.

8. Click the **Save** button.

Maintaining a Plan Discrepancy Record

The Plan Discrepancy Summary contains all of the information recorded about a plan discrepancy.

Instructions 13

Navigation: Construction > Contract Administration > Contract link > Contract Documentation quick link > Plan Discrepancies tab > Description link > General tab

To view general information on a plan discrepancy record:

1. Click the Contract Documentation Summary **Plan Discrepancies** tab.
2. For the plan discrepancy record, click the **Description** link.
3. View the information on the Plan Discrepancy Summary **General** tab.

Viewing Plan Discrepancy Change Orders

The Change Orders tab lists the change orders associated with this plan discrepancy.

Information cannot be changed on this tab. To associate a change order with this plan discrepancy, navigate to the Contract Change Order Summary and click the Plan Discrepancies tab.

Implementation Note: *In order for a change order to be associated to the Plan Discrepancy for review, the adding a change order steps would need to be updated to ensure a plan discrepancy is associated to change order during the creation of the change order section.*

Instructions 14

Navigation: Construction > Contract Administration > Contract link > Contract Documentation quick link > Plan Discrepancies tab > Description link > Change Orders tab

To view change order information on a plan discrepancy record:

1. Click the **Change Orders** tab.
2. For a change order record, view the information.

Adding Plan Discrepancy Contract Project Items

The Contract Project Items tab lists the contract project items associated with this plan discrepancy.

Instructions 15

Navigation: Construction > Contract Administration > Contract link > Contract Documentation quick link > Plan Discrepancies tab > Description link > Contract Project Items tab

To add contract project items to a plan discrepancy record:

1. Click the **Contract Project Items** tab.
2. Click the **Select Contract Project Items** button.
3. Search for and select the contract project items.

   Proj Ln Num: **0015** Item ID/ Item Desc: **0400 2 5 - CONCRETE CLASS II, SUBSTRUCTURE**

   Proj Ln Num: **0040** Item ID/Item Desc: **0415 1 4 REINFORCING STEEL – SUPERSTRUCTURE**

4. Click the **Select Contract Project Items** button.

   The system displays a Save Complete message.

Appendix for Central Office and System Administrators

Managing Change Order Approval Groups

Note: This section is for System Administrators only.

A contract change order must pass through a hierarchy of approvals before any changes can be made to the contract. The hierarchy consists of one or more system users who belong to a change order approval group and are authorized to approve contract change orders. Change order approval groups define which agency and non-agency user groups are required to approve change orders, and where those user groups fit in the approval hierarchy. The reference approval groups and reference approval rules are used together to define each contract's hierarchy of approvals.

Adding a Reference Change Order Approval Group

You must enter the information in these fields to save a new change order approval group:

- Description
- Approval Sequence Number

Instructions 16

Navigation: Reference Data > Change Order Approval Groups

To add a reference change order approval group:

1. From the **Reference Data** component, click the **Change Order Approval Groups** link.
2. Click the component **Actions** button, and choose the **Add** action.
3. In the **Description** field, enter a description for the change order approval group.
4. In the **Approval Sequence Number** field, enter an approval sequence number.
5. Click the **Save** button.

Maintaining a Change Order Approval Group

You may select many check boxes to set up the appropriate attributes of an approval change order approval group.

Instructions 17

Navigation: Reference Data > Change Order Approval Groups

To maintain a change order approval group:

1. Search for and select the **Change Order Approval Group** to maintain.
2. Click the **Contractor** check box if the change order approval group is designated as a contractor group.
3. Click the **External** check box if the change order approval group is external to the agency.
4. Click the **Approve Decision** check box if the change order approval group can apply approve a change order.
5. Click the **Reject Decision** check box if the change order approval group can reject a change order.
6. Click the **Deny Decision** check box if the change order approval group can approve a change order.

7. Click the **Void Decision** check box if the change order approval group can void a change order.

8. Click the **Minimum Approval Level** check box if the change order approval group is required for all change orders regardless of change order rules.

9. Click the **Save** button.

Maintaining Security Roles Assigned to a Change Order Approval Group

The Assigned Roles tab contains a list of all the security roles that have been assigned to the change order approval group.

Instructions 18

Navigation: Reference Data > Change Order Approval Groups

To assign a role to a change order approval group:

1. Click the **Assigned Roles** tab.

2. Click the **Select Roles** button.

3. Search for and select the roles you want to assign to the approval group

4. Click the **Add to Approval Group** button.

Maintaining Change Order Approval Rules

Note: This section is for System Administrators only.

Approval rules are used by the agency to define the approval levels for change orders and the sequence in which approval groups must perform the approvals. Approval rules are based on these factors:

- The type of contract
- The functions included in a change order
- The amount of money a change order increases the contract
- The addition of a new item to the contract

Adding a Change Order Approval Rule

You must enter the information in these fields to save a new change order approval rule:

- Rule Description
- Change Order Type
- Contract Type
- Contract Type
- Item Threshold Calculation Level
- Threshold Calculation Method

You select check boxes to set up the appropriate functions for the approval change order approval rule. If you select a threshold calculation method based on amounts (that is, Per amount all change orders or Per amount per change order), the system automatically selects the following functions: Increase/Decrease Items, New Items, Time Adjustments and Contract Modification Only and does not allow changes

Instructions 19

Navigation: Reference Data > Change Order Approval Rules

To view a Change Order Approval Rule:

1. From the Reference Data component, click the Change Order Approval Rules link.
2. Click the Change Order Type link.
3. Review the attributes of the change order approval rule

Maintaining Approval Group Limits for an Approval Rule

The maximum dollar amounts, percentages and time changes must be established for one or more approval groups specified on the change order approval rule. The approval group limits are contained inside a sliding panel of fields sets on the Approval Group Limits tab.

Instructions 20

Navigation: Reference Data > Change Order Approval Rules

To add approval group limits:

1. Click the Approval Group Limits tab.
2. Click the **New** button.
3. In the Approval Group field of the new row, search for and select the approval group.
4. In the sliding panel, enter information in the fields appropriate for the limits you are creating for the approval group.
5. In the sliding panel, click the button for the third field set to view the limits.
6. In the sliding panel, click the button for the fifth field set to view the limits.