

# **SITEMANAGER**

## **FIELD USER MANUAL**



**SITEMANAGER  
FIELD OFFICE  
USER MANUAL**

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# **DAILY WORK REPORTS (DWR's) DIARIES**

## DWR Procedure

SiteManager Daily Work Reports (DWR) should be entered into SiteManager by the inspector responsible for the inspection of each appropriate work item, or if so designated by the Project Engineer, entered by the “primary inspector”. The SiteManager DWR is somewhat equivalent to the old style Project Diary. The inspector’s user ID associated with the DWR is equivalent to their signature on the Project Diary form. No one should enter information for another user into SiteManager. Multiple DWR on any given day for a project are acceptable and likely. **Inspectors shall not handwrite a DWR with the intent that the Office Manager creates the DWR.**

“Stand alone” capabilities of SiteManager enable the inspector to enter DWR information at the project site and then upload to the server that afternoon or the next morning. Modifications can be made after uploading to the server, but only on the server.

## DIARY Procedure

A Diary will be created, that includes authorizing DWR for a given day, charging time and making remarks, by the Project Engineer or someone authorized by him in writing. That person should have signatory authorization, appropriately approved, for signing project diaries. A copy of this authorization approved at the district, should be sent to the Construction Audit Section. Whether the DWR is authorized by the Project Engineer or by someone with the P.E.’s signatory authorization, **the Project Engineer is solely responsible for the content of the Diary and DWR.**

ALL DWRs should be authorized – if one contains incorrect quantities then they should either be changed or corrected by a supplemental DWR.



## Summary of POLICY CHANGES

1. Old style DIARIES, as per EDSM III 5.1.8, or paper copies of signed SiteManager Diary Reports will no longer be required for SiteManager only projects.

## PLEASE NOTE:



Project Engineers shall no longer print and sign daily project diaries for SiteManager projects. EDSM III.5.1.8 will be revised shortly to reflect this change. See email from Mr. Rick Holm dated 6/1/2005.

# DWR PREPARATION GUIDE


- Log on to SiteManager. Make sure that you enter your User ID. The last person to use SiteManager on your computer will have his ID entered in there. If you forget and try to use your password with his ID, you will lock him/her out after 3 tries.
- Click on “Daily Work Reports”
- Go to “Services” – then “Choose Keys” then choose your contract ID number.
- Click on “New” 
- Enter date or double click in date field and it will bring up calendar – then you can choose from there
- Begin entering information. Do not input information in the “No work Items Installed”, “No Contractors on Site”, “No Daily staff of site” fields. That information will be gathered from your DWR.
- After you have entered the top information, go to the Remarks section.
  1. **Work Hours** – Enter time contractor was present on project – “8:00 a.m. – 7:00 p.m.”
  2. **General Remarks** – Comments that **cannot** be associated with an item go here – you will use the remarks field on the work item tab (“bubble” remarks) to put remarks relative to items. 
  3. **Primary Inspector** – If the Project Engineer or Project Supervisor has designated you the primary inspector for that project, enter “yes” in this field. **Do not enter anything other than yes in this field, do not hit a space and do not hit the enter button.** If you are not the primary inspector, or have not been designated as the primary inspector for the day, leave it blank. Please note that **anyone** can be the primary inspector for the day. The “yes” in this field will let the Office Manager and PE know that you are the one to look to for time charges, temperatures, weather conditions and remarks will show up on the diary that the OM or PE generates.
  4. **Ctrl. Work Item** – Enter the controlling work item if you are the primary inspector. With jobs not using CPM’s, use section numbers only: “501”. **Always** match the contractor’s Progress Schedule.
  5. **Time Charge Comments** – If you are the Primary Inspector and entered “yes” to number 3 above, enter “Recommend Charge” or “Recommend No Charge” – then enter the reason you did not charge in order to establish consistency with standard reasons. **Too wet, too cold, weekend, utility, waiting final inspection** are the only reasons to use. However, if you are instructed by the PE to stop charging time then input “**No Charge – Other**”.
  6. **Traffic Control** – If you inspected the signs that day, enter Signs & Barricades info here: “Signs & Barricades up and functioning” or “Under Construction sign at Sta. 0+00 blown down” then Refer to Remarks #8.
  7. **Project Progress** – Only enter FACTS! Things or happenings that may contribute to un-satisfactory progress.

8. **Inst. To Cont.** – Any instructions you may have given to contractor i.e.;  
“Contractor notified at 2:15 p.m. of sign being down, see Remark #6, re-erected at 4:00 p.m.”
9. **Util.** – Anything to do with utilities.
10. **Accidents** – Any accidents that may have occurred
11. **Staff Details** – Our people that were on the job
12. **Visitors** – Anyone that may have visited (DCE, FHWA, Mayor, etc.)
13. **Traffic Delays/Complaints** – This will allow you to input any traffic delays or complaints related to the job.
14. **Gen.** – DO NOT PUT ANYTHING HERE.

### **CONTRACTOR TAB**

- Click inside the contractor box. Click on the “new” button 
- Click on the drop down box and select the contractor. Do not input the number of supervisors and workers. When the 2 bottom boxes are filled out, these fields will be automatically populated. (**SEE EXAMPLE, PAGE 1 – 7.**) The input of hours is not recommended. Click on the “save” button 
- Click in the 2<sup>nd</sup> box – “Supervisor/Foreman”
- Click on new – then select
  - A selection entitled “Supplier/Hauler is available in this box. Select this option if a supplier/hauler sub-contractor delivers materials to your project. Save then make any applicable remarks in the “bubble” remarks area.
    - Remarks to be included can be number of trucks, number of drivers, amount of material delivered, etc.
- When finished Click in the 3<sup>rd</sup> box – “Personnel Type”
- Click on new – then select personnel type, clicking new every time to input different personnel types. Note: Personnel Types are designed to match the classifications on the FHWA PR1391 Report
- Move back to the contractor box and click inside an empty area to bring in focus. Click “new” and repeat the steps above to enter all of the contractors for that day, clicking “new” every time to be able to enter different contractors

### **CONTRACTOR EQUIPMENT TAB**


- Click in the Contractor box to highlight (blue background)
- Click in empty area of Equipment ID to bring in focus.
- Click on new 
- Click on all of the equipment that you want and enter the number of pieces clicking “new” every time to enter different kinds of equipment
- If you have equipment that is not on list, go to Other and select the remarks bubble (the one to the right of the save icon) Input your equipment in the remarks bubble – Note that you can use “Other” only once, therefore if you have 3 pieces of






equipment that do not fall in the equipment master, add them all here with the number beside them i.e., Concrete Saw – 1, Chain Saw – 3, etc.







### DAILY STAFF TAB

- Click in the Staff member box
- Click on “New” 
- Select the field “See Staff Detail Remarks”. This refers back to the first page of the DWR with all of the inspectors’ names. This will also remove the check mark beside “No Daily Staff on Site”.

### WORK ITEM TAB

- This is where you input your work items for the day. When you click on the tab button, a list containing all work items will appear. If you have multiple projects in a contract, they will be listed in project no. order. If you wish to have all items in order by item number, just click in the “ITEM CODE” box and it will arrange them in item number order. **(SEE EXAMPLE PAGE 1-7)**
  - Click on your item that you wish to record.
  - Click on “RECORD WORK ITEM” (the pencil) \*\* If the entry screen does not appear, you may have forgotten to select a contractor in the “CONTRACTOR TAB”. **If a contractor has not been selected, work items cannot be recorded.** Remember to select your subs
  - Item entry screen will open. Click on “New” 
  - Input quantity in the “placed quantity” field. **Pay each item to the decimal point that is in your contract’s Schedule of Pay Items. This can differ from contract to contract. Always check for decimal places before entering the “placed quantity” field.**
  - Click on the contractor drop down box and select the contractor
  - The “Plan pg. #” is optional. We do not use plan page no. as a reference in Louisiana. Either leave this field blank or record a plan page number as additional information, if applicable. It was suggested that you might want to use this field for Structure Numbers.
  - “Location” is field book and page reference. See reference instructions in Section 5.
  - Station to and from are no longer mandatory fields. It is suggested that you do use these when possible
  - “Offset” will be input as either “Lt.” (left of c/l) or “Rt.” (right of c/l) or “LR” (left and right of c/l).
  - Go to “bubble icon” if you have remarks related to this item 
  - If you have more areas for that item that you wish to input, just hit “new”. This creates Location #2, Location #3, etc.
  - Hit “Save” 
  - If you wish to record different work item quantities, click on “Select work item” (the open book that is to the right of the pencil). Then repeat the process.

## Attaching a Document

- After saving a Work Item Tab location entry, click on the **ATTACHMENT** icon (paperclip - yellow background).
- Click on the **NEW OLE** icon. 
- Select the **CREATE FROM FILE** tab.
- Click **BROWSE** and find the document to be attached. Highlight the document file name and click **OPEN**. 
- Click **OK**. 
- Give the attachment a short name and then a more detailed description.
  - Example Name: CSheetCO\_002
  - Example Description: Category Worksheet Change Order 002.
- **Always** click **ADD ALL**. Then click **ADD** at the bottom of the window.
- The attachment list will return.
- Click the **SAVE** icon. 
- To view the attachment, highlight it in the list and click on the **RUNNING MAN** icon.
- Click on the paperclip (yellow background) to close the attachment list.

(Caution: Depending on network speed, saving and viewing attachments can be time consuming.)

**AASHTO SiteManager**

File Edit Services Window Help

**Daily Work Reports**

DWR Info. Contractors Contractor Equip. Daily Staff Work Items Force Accounts

Contract ID: 025-01-0040 Inspector: Perkins, James Dale Date: 05/06/04

| Contractor                                     | Nbr of Supervisors | Nbr of Workers | Contractor Hrs Worked |
|--|--------------------|----------------|-----------------------|
| 721383736 PRAIRIE CONTRACTORS INC. ** PRIME ** | 1                  | 14             | 0.000                 |

| Supervisor/Foreman Name | Hours Worked |
|-------------------------|--------------|
| Superintendent          | 0.000        |

| Personnel Type      | Nbr of Persons | Hours Worked | Total Hours |
|---------------------|----------------|--------------|-------------|
| Equipment Operators | 5              | 0.000        | 0.000       |
| Laborers            | 5              | 0.000        | 0.000       |
| Truck Drivers       | 4              | 0.000        | 0.000       |

Ready Server PROD JDM jd0822

..... These fields are automatically populated when .....

These fields are entered.

**AASHTO SiteManager**

File Edit Services Window Help

**Daily Work Reports**

DWR Info. Contractors Contractor Equip. Daily Staff **Work Items** Force Accounts


Contract ID: 025-01-0040 Inspector: Perkins, James Dale Date: 05/06/04

| Project Number | Line Item Number | Category Number | Item Code   | Description  | Supplemental Instid | Description 1             |
|----------------|------------------|-----------------|-------------|--|---------------------|---------------------------|
| 025-01-0040    | 0001             | NH              | 602-02-H    | Removal of Guard Rail                                      |                     | Removal of Guard Rail     |
| 025-01-0040    | 0002             | NH              | 203-06      | Borrow (Vehicular Measurement)                             |                     | Borrow (Vehicular Measur  |
| 025-01-0040    | 0003             | NH              | 401-02      | Aggregate Surface Course (Adjusted Vehicular Measure)      |                     | Aggregate Surface Cours   |
| 025-01-0040    | 0004             | NH              | 502-01-B    | Superpave Asphaltic Concrete (Level 2)                     |                     | Superpave Asphaltic Con   |
| 025-01-0040    | 0005             | NH              | 502-01-B-01 | Superpave Asphaltic Conc Wearing Course (Level 2F)         |                     | Superpave Asphaltic Con   |
| 025-01-0040    | 0006             | NH              | 502-01-D    | Superpave Asphaltic Concrete, Incidental Paving (Level A)  |                     | Superpave Asphaltic Cor   |
| 025-01-0040    | 0007             | NH              | 507-01-B    | Asphaltic Surface Treatment (2 Applications)               |                     | Asphaltic Surface Treatm  |
| 025-01-0040    | 0008             | NH              | 509-01      | Cold Planing Asphaltic Pavement                            |                     | Cold Planing Asphaltic Pa |
| 025-01-0040    | 0009             | NH              | 509-02      | Contractor Retained Reclaimed Asphaltic Pavement           |                     | Contractor Retained Recl  |
| 025-01-0040    | 0010             | NH              | 602-02-A    | Cleaning and Resealing Existing Longitudinal Pavement Joi  |                     | Cleaning and Resealing E  |
| 025-01-0040    | 0011             | NH              | 602-02-B    | Cleaning and Resealing Existing Transverse Pavement Joi    |                     | Cleaning and Resealing E  |
| 025-01-0040    | 0012             | NH              | 602-03      | Cleaning and Sealing Random Cracks                         |                     | Cleaning and Sealing Ra   |
| 025-01-0040    | 0013             | NH              | 602-05-G    | Full Depth Patching of Jointed Concrete Pavement (8" Thick |                     | Full Depth Patching of Jo |
| 025-01-0040    | 0014             | NH              | 704-03      | Blocked Out Guard Rail                                     |                     | Blocked Out Guard Rail    |
| 025-01-0040    | 0015             | NH              | 704-06      | Guard Rail Anchor Sections (Trailing End)                  |                     | Guard Rail Anchor Sectio  |
| 025-01-0040    | 0016             | NH              | 704-07-A    | Guard Rail Bridge Attachments (Single Thrie Beam)          |                     | Guard Rail Bridge Attachi |
| 025-01-0040    | 0017             | NH              | 704-08-B    | Guard Rail Transitions (Double Thrie Beam)                 |                     | Guard Rail Transitions (D |

Ready Server PROD JDM jd0822

Click in Item Code bar to list by item number

## **DWR GENERAL NOTES**

1. Unless instructed otherwise by your Office Manager, you will not record quantities for Temporary Signs & Barricades, Mobilization, or Construction Layout. The Office Manager will make a DWR to reflect these quantities at the end of the estimate period. The Office Manager will also enter any applicable fuel adjustments. You can, however, go into the Temporary Signs & Barricades item and record any station numbers and field book references that you wish. Just do not record a quantity. Quantity will be zero (0).
2. If you want to delete anything on the DWR, click on the “delete” button (the French fry box).
3. **If you work on an item but did not have any items for pay, you must go to the work items tab, leave the quantity at zero (0), click on the contractor and the location and save. This will show that you did work on that item that day. If you do not go to the work item, it will show up as “No Work” on the weekly report that DCE receives. When recording a zero (0) quantity, be sure to include sta. to sta. (if applicable) and “bubble” remarks.** 
4. If you have any problems, contact: Your **(first choice) District SiteManager User Representative**, Wayne Weick – 225-379-1593, or Robert Dupont 225-379-1592. To have your password re-set, call the computer help desk at 225-379-1607. After 3 unsuccessful tries of logging on, your User ID will be disabled. *Trick for the brave-hearted:* Try 2 times and if unsuccessful, log out of SM and then try again.

### **HELPFUL HINTS:**

If you have the same contractor information and equipment and want SM to copy over the contractor information, go to the DWR you want to copy from and then key in the new date and hit enter. It should then ask you if you want to copy contractor information, hit yes. You can then keep same information or modify.

When selecting from drop down boxes the first letter of the selection you wish to make can be entered. The dropdown box will scroll to the first word in the list that begins with your selected letter.

If you need to create DWR's for more than one project on a given day, complete and save your first DWR, then click “new”(blank sheet of paper), the proceed with services-choose keys procedure as described previously. Repeat as necessary.

# DIARY AND WEEKLY REPORT GUIDE FOR PROJECT ENGINEERS AND PROJECT SUPERVISORS

## **PREVIEWING THE DIARY FROM “SITEMANAGER REPORTS” ON THE INTRANET**

Before you create the diary you may go to “Construction Home Page”, “SiteManager”, “SiteManager Reports”, ‘Option 4 – Diary Preview’ and review online or print these reports as an aid in creating the diary.

## **CREATING THE DIARY:**

- Log in to SiteManager go in to the PE or PS group.
- From the main panel, select “Daily Work Reports”
- Select “Diary”
- Go to “Services”, “Choose Keys” – select your contract ID
- Click on date field and input date you wish to make a diary for or (Clicking on the open folder will take you to the last diary created).
- Preview the DWR (or look at your report you printed from the intranet) so you can check that inspector has input “yes” in the primary inspector field and check his recommendation for charging a day.
- The PROJECT ENGINEER has the same remark categories available on the DIARY as the inspector does on the DWR. Any remarks which the PE wishes to make would appear on the DIARY. Again, the ‘Project Progress’ remark should only be used to note things or happenings that may contribute to un-satisfactory progress on the project. FACTS!
- If the DWR is satisfactory, click in the “Authorized” box. A checkmark will appear. Hit the diskette icon to “save”. SM will automatically charge for the day and there is no need to go to the charge tab unless you are not charging. If it’s a “working day” contract and if you are not charging for the day, go the “Charge” tab and click on “no charge” and give the reason. Hit “save”. You have now created the Diary for the day.

**NEVER CHARGE A “HALF DAY”**

**CALENDAR DAY CONTRACTS – CHARGE EVERY DAY**

**PRINTING THE WEEKLY REPORT** (The District Construction Engineers in some Districts continue to use the Weekly Reports. If your district does not use this report, just disregard this)

- After you have created the diary reports for the week, go to the intranet Report Page, Option 8 – “Weekly Force and Progress Report”. View and then print if you wish.

**DISTRICT 08:** SENDING A SIGNED COPY TO DCE IS NO LONGER NECESSARY.

**Other Districts:** \_\_\_\_\_  
\_\_\_\_\_

- If your P.E. prefers, print Weekly for review and file.

**GANG 08/248:** PRINT EACH WEEK (ON MONDAY) FOR P.E.’S REVIEW – THEN FILE.

**Other P.E. Offices:** \_\_\_\_\_  
\_\_\_\_\_

### **DIARY/WEEKLY GENERAL NOTES**

**All DWR’s are to be authorized.** If the DWR was created in error, have the inspector remove all information, then authorize the DWR. If there is a quantity on the Work Item Tab that you do not wish to pay, and for whatever reason, the inspector cannot change the quantity, authorize the DWR. Then make another DWR for the applicable day and “minus out” the unwanted quantity. Put explanatory remarks in the remarks “bubble” on the Work Item Tab. It has been determined that unauthorized DWR’s create confusion and result in increased questioning during final audit.

### **HELPFUL HINTS:**

If you need to create diary for more than one project on a given day, complete and save your first diary, then click “new”(blank sheet of paper), then proceed with services-choose keys procedure as described previously. Repeat as necessary.

Calendar Day contracts are entered into SiteManager as if they were Working Day contracts. Both are reported identically except that **every day (including weekends, holidays and inclement weather days) will be charged on a Calendar Day contract.** It is possible to stop time charges on Calendar Day jobs; however, occurrences are rare and should be done by change order. Under normal operating procedures, every day must be charged on a Calendar Day Contract.

## Suggested DWR Searches

Are there unauthorized or missed DWR's on my project?

1. NAVIGATE TO MAIN PANEL - DAILY WORK REPORTS - HISTORY. SELECT THE CONTRACT ID. SELECT THE DWR HISTORY TAB.

History

DWR History Work Item History Contractor History

Contract ID: 025-01-0040

RPT-ID: RDWRHCON Louisiana DATE: 02/23/2005  
USER: d0822 Dept. of Transportation and Development PAGE: 1 of 116

DAILY WORK REPORT HISTORY FOR CONTRACT: 025-01-0040  
GROUP BY DWR DATE

| Inspector ID | DWR Date   | Locked | Authorized | Paid | High Temp | Low Temp | AM Condition                | PM Condition                 |
|--------------|------------|--------|------------|------|-----------|----------|-----------------------------|------------------------------|
| d0822        | 09/08/2004 | No     | No         | No   | No        | No       | No Daily Staff on Site: Yes | No Work Items Installed: Yes |

Remarks: No

Work Suspended Indicator: No Work Suspended Time: 00:00 Work Resumed Time: 00:00

No Contractor on Site: Yes

Use Arrows to quickly navigate through each day. The DWR's are listed by day then by Inspector ID.

2. NAVIGATE TO MAIN PANEL - DAILY WORK REPORTS. SELECT THE CONTRACT ID. CLICK THE OPEN FOLDER ICON. SELECT INSPECTOR.

A list of DWR's **per inspector** displays. Note the Auth Ind for "Yes" or "No".

Contract ID Selection

Contract ID: 025-01-0040 , 721383736 , NH-5802(500)  
Inspector: d0822 , Monk, Paula, 025-01-0040  
Date:

Find:

Date

| DWR Date | Locked | Auth Ind |
|----------|--------|----------|
| 09/08/04 | No     | No       |
| 07/26/04 | No     | Yes      |
| 07/12/04 | No     | Yes      |
| 06/16/04 | No     | Yes      |
| 06/11/04 | No     | Yes      |
| 06/10/04 | No     | Yes      |
| 06/09/04 | No     | Yes      |
| 05/20/04 | No     | Yes      |

OK Cancel

3. ON THE INTRANET CONSTRUCTION HOME PAGE, NAVIGATE TO SITEMANAGER REPORTS. SELECT #4, DIARY PREVIEW

Select District, Project and select a DWR date in the list. Click “Generate Report”

Diary Preview - Microsoft Internet Explorer

Address: http://h13001ms001.dotd.state.la.us/smrreports/DWR\_Report.asp?projnum=025-01-0040&dwrdate=20040725

07/25/2004

|                         |                          |
|-------------------------|--------------------------|
| Work Order Date:        | 04/13/2004               |
| Time Charge Type:       | Available Work Days      |
| Allotted Contract Time: | 50                       |
| Ctrl. Work Item:        | OTHER [WAITING ON FINAL] |
| High Temp:              | 0                        |
| Low Temp:               | 0                        |
| AM Cond.:               |                          |
| PM Cond.:               |                          |
| Total Charge Days:      | 31                       |
| Percent Time Elapsed:   | 62                       |
| Days Since Work Order:  | 104                      |
| Percent Complete:       | 99.21%                   |
| Diary Not Charged       |                          |

DWR Remarks:

Perkins, James Dale

Authorized: Y

Primary Inspector: Perkins, James Dale

Time Charge Comments: RECOMMEND NO CHARGE TODAY [WAITING ON FINAL]

Installed Item Totals:

No items for this day.

Contract: 025-01-0040  
DWR Date: 07/25/2004

Previous Next

Use the “Next” or “Previous” buttons to display each day. Multiple DWR’s for the same day will be listed on the same page. Authorized will display “Y” or “N”.

4. ON THE INTRANET CONSTRUCTION HOME PAGE, NAVIGATE TO SITEMANAGER REPORTS. SELECT #24- UNAUTHORIZED DWR DAYS LIST Select District and Project

Unauthorized DWR Days List - Microsoft Internet Explorer

Address: http://h13001ms001/smrreports/Unauth\_DWR.asp

SMCR0024

### Unauthorized DWR Days List

Please select a district and/or contract

District Number: 05

Contract Number: 000-00-0005 - (Route US 80) WARREN DRIVE TO CIRCLE DRIVE AND THOMAS ROAD (WEST MONROE)

The following days have unauthorized DWRs on them.  
They may or may not already have an associated diary.

02/03/2005  
02/22/2005  
04/04/2005  
04/07/2005




# **PROGRESS ESTIMATES**

## **PRICE ADJUSTMENTS**

## SECTION I ESTIMATE PREPARATION GUIDE FOR OFFICE MANAGERS

1. Log in as Office Manager (OM)
2. Navigate to CONTRACTOR PAYMENTS – ESTIMATE – GENERATE ESTIMATE
3. From the top menu bar select SERVICES – CHOOSE KEYS and then select your contract
4. The beginning date is displayed. Input the ending date.
  - a. The ending date must adhere to current DOTD policy
5. Note: The previous estimate must be approved at all approval levels – otherwise the estimate will not generate. Only the ‘Office Manager’ group can generate estimates. If you need to generate estimates and do not have the ‘Office Manager’ group available to you then contact your district SiteManager User Rep (SMUR).
6. Click the icon “GENERATE ESTIMATE”. (Lightening bolt between two poles)
7. Wait until after receipt of 3 message panels, answering OK when necessary.
8. Minimize SiteManager and if applicable, Remote Desktop.
9. Go to **intranet SM Reports** and select report #11 – PARTIAL ESTIMATE QUANTITIES. If you prefer, print this report. Check the quantities listed on the report against the actual as-built pay quantities from field books, your spreadsheet records, etc.
10. Are any pay items marked with an asterisk (\*)?
  - a. If **YES**, were these marked items originally in the contract with “zero” plan quantity (pay adjustments provided by specifications, fuel and asphalt adjustments, etc.)?
  - b. If **YES**, the asterisk-marked quantities **CAN** be paid.
    - i. “Zero-Plan” items will generate discrepancies that must be overridden and remarked and eventually change ordered, but payment of these items is expected and/or required **before** the approval of a change order. For more information on the proper handling of discrepancies, refer to **SECTION III. ESTIMATE DISCREPANCIES**

- ii. Continue to **SECTION II. SUGGESTIONS FOR PROGRESS ESTIMATE REVIEW**

c. If No, 

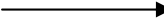

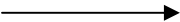
- i. **Paying an estimate with asterisk-denoted items is a violation of DOTD Policy.** Items must be either removed or reduced in quantity before proceeding. Construction Audit will not proceed with payment if the estimate report contains any asterisk-denoted items UNLESS those items were provided by standard specifications for pay adjustments and the plan quantity for these items was originally zero. **It IS PERMITTED to pay asterisk-marked pay adjustment, fuel adjustment and asphalt adjustment items.**

ii. **EXAMPLES OF ASTERISK-MARKED VIOLATIONS:**

1. Overruns of 100% or more
2. Overruns amounting to more than \$20,000.00 (***This limit will soon be significantly increased.***)
3. Allowable overruns (those 5% or greater and less than 100% or less than \$20,000) will NOT be asterisk-marked. These overruns are monitored in SiteManager at CONTRACTOR PAYMENTS – ESTIMATE – ESTIMATE DISCREPANCY. Estimate discrepancies are explained in greater detail in **SECTION III.**

## SECTION II. SUGGESTIONS FOR PROGRESS ESTIMATE REVIEW

(Continued from Section I, the progress estimate has been generated and there are no asterisk-marked quantities which violate DOTD policy)

1. Compare quantities to field books or spreadsheets
2. Return to SM and Navigate to CONTRACT ADMINISTRATION – REPORTS – ITEM WORK REPORT. Mistakes can be found by viewing the daily entries on these reports.
3. In SM, navigate to CONTRACTOR PAYMENTS – REPORTS – INSTALLED WORK REPORT. Investigate any quantities listed here. Was the authorization of a DWR overlooked? If so, it will be listed without an X'ed authorization box.
4. Did you find errors with the inspectors' daily entries? If yes,
  - a. Delete the estimate (Navigate to CONTRACTOR PAYMENTS – ESTIMATE – ESTIMATE HISTORY). After estimate has been deleted, two possible options:
    - i. Have the diary unauthorized and allow the inspector to make corrections.
    - ii. **OR** you may need to create a DWR for the last day of the estimate period, make your corrections and add explanations in the “bubble” remarks on the affected Work Item Tab.
5. Note the percent complete from the Partial Estimate Quantities Report. Are Lump Sum percentage pay items due (Mobilization, Temporary Signs and Barricades, Construction Layout)??
  - a. If so, Refer to **SECTION IV LUMP SUM ITEMS** 
6. Do fuel/asphalt adjustments apply to this contract?
  - a. Does the contract contain special provisions for fuel adjustments? If so, were any items so designated for pay adjustments listed on this Partial Estimate Quantities Report? If so, refer to **SECTION V FUEL/ASPHALT ADJUSTMENTS** 
  - b. Are any items printed on the Partial Estimate Quantities Report preceded by the dagger symbol (**†**)? If so, a fuel adjustment may be required. Refer to **SECTION V FUEL/ASPHALT ADJUSTMENTS** 

- c. Is your contract time greater than or equal to 100 Working Days or 250 Calendar Days? If so, fuel/asphalt adjustments could apply. If no items are designated for pay adjustments in the Special Provisions, check with Construction Audit.
- 7. Review discrepancies. Navigate to CONTRACTOR PAYMENTS – ESTIMATE – ESTIMATE DISCREPANCY. Refer to **SECTION III ESTIMATE DISCREPANCIES**
- 8. After corrections are made, lump sum items are entered and the fuel/asphalt adjustment items have been added (if applicable), and after your DWR is authorized (if applicable), navigate to CONTRACTOR PAYMENTS – ESTIMATE – GENERATE ESTIMATE and re-generate the estimate. View reports again and verify. Print the estimate again for the P.E.'s review.
- 9. After P.E.'s review navigate to CONTRACTOR PAYMENTS – ESTIMATE – ESTIMATE APPROVAL and approve the estimate as Office Manager. If overrun discrepancies still exist, you will receive a warning message when you approve the estimate.
  - a. Refer to **SECTION III ESTIMATE DISCREPANCIES**
- 10. After your approval of the estimate, send the Lotus Notes Partial Estimate Notification email to your P.E. **The comments area of this notification should contain the same discrepancy remarks that were entered into SiteManager's Estimate Discrepancy remarks. See SECTION III, ESTIMATE DISCREPANCIES and SECTION VII ESTIMATE SUBMITTAL AND APPROVAL PROCEDURE.**

### SECTION III. ESTIMATE DISCREPANCIES

1. If the Office Manager received the “discrepancy warning” message, but inadvertently approved the estimate
  - a. Ask your P.E. to reject the estimate then correct or override and remark the overrun errors and re-generate the estimate. The P.E. will navigate to CONTRACTOR PAYMENTS – ESTIMATE – ESTIMATE REJECTION
2. After the estimate has been generated, but before the Office Manager’s approval
  - a. Navigate to CONTRACTOR PAYMENTS – ESTIMATE – ESTIMATE DISCREPANCY. If discrepancies exist here - two possible options:
    - b. OVERRIDE and REMARK the discrepancy, APPROVE the estimate and allow the estimate to go forward to the next approval level with the existing discrepancy overridden. Example Remark: *Item 402-01 overrunning plan quantity by 7.8%. Change Order Pending.***
    - c. OR Correct the overrun errors and re-generate the estimate.**
      - i. CAUTION: ONLY THE OFFICE MANAGER RECEIVES SITEMANAGER’S AUTOMATED WARNING IF DISCREPANCIES EXIST. IT IS THE OFFICE MANAGER’S RESPONSIBILITY TO ENSURE THAT THE PROJECT ENGINEER IS MADE AWARE OF ANY EXISTING DISCREPANCIES.**
3. The most common discrepancies are allowable overruns awaiting the approval of a change order. An Item which appears on the Estimate Report with an asterisk and whose original plan quantity was **NOT** zero
  - a. IS NOT** allowable. This item must be reduced or removed before the estimate can be paid.

## SECTION IV LUMP SUM ITEMS BASED ON PERCENT CONTRACT COMPLETE

### Mobilization – Temporary Signs and Barricades – Construction Layout

#### 1. To pay for these items

- a. Determine if payment is due by verifying the percent contract complete from the Partial Estimate Report.
  - i. **TIP: IF THE ESTIMATE HAS NOT BEEN GENERATED, YOU CAN FIND THE PERCENT CONTRACT COMPLETE BY VIEWING THE LAST DIARY REPORT FOR THE APPLICABLE PAY PERIOD. (SITEMANAGER INTRANET REPORT #4)**
- b. Create a DWR for the last day of the estimate period
- c. Add the correct percentage payments to the Work Item Tab
- d. Enter any comments in the Work Item Tab “bubble remarks”

-  RETURN TO SECTION II

## SECTION IV FUEL/ASPHALT ADJUSTMENTS

### Pay Adjustment Items for Fuel

If you have not generated an estimate – generate it now. An estimate must exist in order to calculate pay adjustments.

- Minimize SiteManager and if used, minimize Remote Desktop
- Go to SM Reports on the intranet
- Select No. 7 – FUEL & ASPHALT ADJUSTMENT CALCULATOR
- Select your project and the appropriate estimate number
- The first item to be pay adjusted will appear. Click “CALCULATE”
- The adjustment is automatically calculated.
- Click on the bar entitled “NEXT ITEM”. The next applicable item will automatically appear and calculate. Continue until all items are calculated.
- The TOTAL ADJUSTMENT is displayed
- Click “VIEW REPORT”
- A report is displayed – one item per page. (Note that this report can also be selected from the SM Reports page – Report No. 07, Option 2.)
- Print the reports to be filed with your records. (See example Page 2 – 10)
  - **These reports will be sent to Construction Audit with the final estimate supporting documentation**
- If you have not already done so, create a DWR for the last day of the estimate period
  - On the Work Item Tab, select the correct item for payment of Fuel Adjustments. Example: 999-04
  - Enter the total fuel adjustment in PAY QTY. Example: 634.91
  - The unit price is \$1.00
- Have your DWR authorized



**Tip:** On the first estimate in which fuel adjustments are applied, compare the usage factors with your contract. Entry errors are possible.

**Note:** If fuel pay adjustments are used (plan quantity increases from zero), a Change Order will be required before the final estimate can be generated.

## **RETURN TO SECTION II**

### Pay Adjustment Items for Asphalt

If you have not generated an estimate – generate it now. An estimate must exist in order to calculate pay adjustments.

- Obtain/Verify the type, % Asphalt and type of fuel used at the asphalt plant for all lots from your Plant inspector.
- Minimize SiteManager and if applicable, Remote Desktop
- Go to SM Reports on the intranet
- Select No. 7 – FUEL & ASPHALT ADJUSTMENT CALCULATOR
- Select your project and the appropriate estimate number
- Click the bar entitled “NEXT ITEM” until the next Asphaltic Concrete Item appears
- Enter applicable percent sales tax.
  - The sales tax rate is the actual rate charged to the contractor at the point of delivery. Ask the contractor for a copy of an invoice from his supplier (one per source per plant location). Reimburse the actual sales tax percentage shown on the invoice. If no invoice is available, use the default rate of 4%.
- The first line is fuel. The report defaults to diesel. If natural gas is used, checkmark the box
- The second lines are input fields for asphalt adjustments
- Click on type of AC
- Type in % AC in decimal form (4.2% would be .042)
- Type in tonnage used
- Type in date (Format: **00/00/2005**) (Two digits must be used for MONTH – Example: March = 03). (For asphalt used during the current estimate period, enter the first day of the estimate period. For asphalt used for another estimate period, enter the first day of the estimate period in which the asphaltic concrete was laid.) See example of the asphalt calculator on Page 2 – 11.

- If you have other lots with different types of AC, different %, or different dates go to the next line and input that information using the above instructions
  - Note: You may find that a pre-compiled, ongoing list of the pertinent information will be helpful at this point. For examples of information which may be helpful to have on hand at estimate time, see the PROGRESS ESTIMATE GENERAL NOTES section suggestion below.
- Click on CALCULATE
- The adjustment is calculated.
- Click on the bar entitled “NEXT ITEM”. The next applicable item will automatically appear and calculate. Continue until all items are calculated.
- The TOTAL ADJUSTMENT is displayed
- Click “VIEW REPORT”
- A report is displayed – one item per page. (Note that this report can also be selected from the SM Reports page – Report No. 07, Option 2.)
- Print the reports to be filed with your records.
  - **These reports will be sent to Construction Audit with the final estimate supporting documentation**
  - Plant reports are also sent in with final documentation. Be sure to collect all plant reports for lots with tonnage paid.
- If you have not already done so, create a DWR for the last day of the estimate period
  - On the Work Item Tab, select the correct item for payment of Asphalt Adjustments. Example: 999-01
  - Enter the total asphalt adjustment in Pay Qty.
  - The unit price is \$1.00
- Have your DWR authorized

**Note: If asphalt pay adjustments are used (plan quantity increases from zero), a Change Order will be required before the final estimate can be generated.**

**RETURN TO SECTION II**

## FUEL ADJUSTMENT REPORTS

(TO BE PRINTED AND FILED WITH PROJECT RECORDS AND SENT WITH FINAL ESTIMATE DOCUMENTATION)

Adjustments Report - Microsoft Internet Explorer

Address: http://h13001ms001.dotd.state.la.us/smreports/AdjReport.asp?contid=014-06-0031&estnbr=0015

Merriam-Webster Collegiate Dictionary Collegiate Thesaurus Collegiate Encyclopedia Spanish-English Dictionary

SMCR0007

### Louisiana Department of Transportation and Development Fuel and Asphalt Adjustment Worksheet

|                                   |                           |
|-----------------------------------|---------------------------|
| State Project Number: 014-06-0031 | Estimate Number: 0015     |
| F.A.P. Number: STATE ONLY         | Funding: NONP             |
| Route: US 165                     | Parish: Rapides           |
| From 05/01/2004 thru 05/31/2004   | Date Prepared: 06/02/2004 |

**Project: 014-06-0031**

|                           |                          |
|---------------------------|--------------------------|
| <b>Line Item: 0071</b>    | <b>Item Code: 203-01</b> |
| <b>General excavation</b> |                          |

|                                       |                                       |
|---------------------------------------|---------------------------------------|
| Installed Quantity: 355.400           | Installed Date: 05/01/2004            |
| Base Price of Gas: 0.1779             | Base Price of Diesel: 0.1964          |
| Monthly Price of Gas: 0.3280          | Monthly Price of Diesel: 0.2502       |
| Variance for Gas: 0.1690 to 0.1867    | Variance for Diesel: 0.1865 to 0.2062 |
| Price Difference for Gas: 0.1413      | Price Difference for Diesel: 0.0440   |
| Usage Factor for Gas: 0.7400          | Usage Factor for Diesel: 1.4400       |
| <b>Gas Adjustment: \$37.16</b>        | <b>Diesel Adjustment: \$22.51</b>     |
| <b>Total Fuel Adjustment: \$59.67</b> |                                       |

Adjustments Report - Microsoft Internet Explorer

Address: http://h13001ms001.dotd.state.la.us/smreports/AdjReport.asp?contid=014-06-0031&estnbr=0015

Merriam-Webster Collegiate Dictionary Collegiate Thesaurus Collegiate Encyclopedia Spanish-English Dictionary

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| Route: US 165                     | Parish: Rapides           |
| From 05/01/2004 thru 05/31/2004   | Date Prepared: 06/02/2004 |

**Project: 014-06-0031**

|   |                            |
|---|----------------------------|
| <b>Line Item: 0076</b>                    | <b>Item Code: 302-02-D</b> |
| <b>Class II base course (300mm thick)</b> |                            |

|  |                                       |
|--|---------------------------------------|
| Installed Quantity: 20,765.700         | Installed Date: 05/01/2004            |
| Base Price of Gas: 0.1779              | Base Price of Diesel: 0.1964          |
| Monthly Price of Gas: 0.3280           | Monthly Price of Diesel: 0.2502       |
| Variance for Gas: 0.1690 to 0.1867     | Variance for Diesel: 0.1865 to 0.2062 |
| Price Difference for Gas: 0.1413       | Price Difference for Diesel: 0.0440   |
| Usage Factor for Gas: 0.1400           | Usage Factor for Diesel: 0.1800       |
| <b>Gas Adjustment: \$410.78</b>        | <b>Diesel Adjustment: \$164.46</b>    |
| <b>Total Fuel Adjustment: \$575.24</b> |                                       |

|                                      |          |               |   |
|--------------------------------------|----------|---------------|---|
| <b>Fuel Adjustment Item 203-01</b>   | <b>=</b> | <b>59.67</b>  |   |
| <b>Fuel Adjustment Item 302-02-D</b> | <b>=</b> | <b>575.24</b> |   |
| <b>Total All Fuel Adjustments</b>    | <b>=</b> | <b>634.91</b> | <b>Quantity Entered for Item 999-04</b> |

## SiteManager System Fuel/Asphalt Adjustment Calculator

**Fuel/Asphalt Adjustment Calculator - SiteManager Contracts - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Mail

Address [http://h13001ms001/smreports/Fuel\\_Asph\\_Adj.asp](http://h13001ms001/smreports/Fuel_Asph_Adj.asp) Go Links

Number: \_\_\_\_\_

Contract Number: 326-01-0028 - (Route LA 594) LA 15 - GARRETT ROAD

Estimate Number: 0007

\*\*- Dates must be in the form mm/dd/yyyy

Please enter sales tax percent in decimals: 0.04

| Project     | Line # | Item   | Description                  | Type  | % Asph. (decimal) | Nat. Gas                 | Quantity | Install Date * |
|-------------|--------|--------|------------------------------|---|-------------------|--------------------------|----------|----------------|
| 326-01-0028 | 0011   | 502-01 | Superpave Asphaltic Concrete | Fuel  | --                | <input type="checkbox"/> | 2113.17  | 03/01/2005     |
|             |        |        |                              | <input checked="" type="radio"/> PG 64-22<br><input type="radio"/> PG 70-22m<br><input type="radio"/> PG 76-22m | 0.045             | --                       | 14465.92 | 03/01/2005     |
|             |        |        |                              | <input checked="" type="radio"/> PG 64-22   |                   |                          |          |                |


Done Local intranet

Example Sales Tax: Enter the actual rate from the contractor's invoice or 4%

Check if Natural Gas

## PROGRESS ESTIMATES GENERAL NOTES

- **It is the Office Manager's responsibility to follow the progress of the estimate through all levels of approval.** In order to ensure prompt payments to contractors, additional reminders to approvers may be necessary.
- Additional supporting documentation may be required before the estimate can be approved by Construction Audit. Check with Construction Audit for required supporting documentation if the progress estimate is not approved in a timely manner. **Please Note:** Required supporting documentation may include any of the following. If you're not sure if your project requires any of these items call the Partial Estimate Unit of Construction Audit:
  - Documentation for Stockpiled Material. See Standard Specifications Subsection 109.07
  - Force Account Documentation
  - Contractors' payrolls on Federal jobs
  - Invoices for some unique items such as Police and Police Cars used for traffic control are required by Construction Audit before an estimate is processed for payment.
- Negative pay estimates are possible in SiteManager. They are to be avoided if at all possible; they are NOT preferred, but it is possible to generate a negative estimate.
- SiteManager will provide an automatic notification of existing discrepancies **only at the Office Manager's approval level.** At their approval levels, the P.E. and the D.C.E. will not receive automated warnings when discrepancies exist. **Therefore, it is the Office Manager's responsibility to ensure that the Project Engineer is aware of any overridden discrepancies.** This is most efficiently done by using the comments area of the Lotus Notes automated notification.
- DOTD Policy requires the payment of exactly **one estimate per month.** As it was with ESTI projects, and due to occasional periods of no activity, this requirement sometimes results in "zero quantity" payments to the contractor. See SiteManager Reports #22 for a list of due/overdue progress estimates. Prepare one estimate per month even when no quantities are due.
- Items are to be paid to the decimal point of accuracy as listed in the contract's Schedule of Pay Items.
- Fuel/asphalt price adjustments have historically resulted in frequent and reoccurring errors. Communicate with the plant, research plant records, check the math and document well to avoid repeating these reoccurring errors:
  - **The wrong plant type (diesel fuel or natural gas)**
  - **Incorrect asphalt grade**

- **Incorrect percent asphalt**
- See example on the next page. For pay adjustments related to the asphalt plant, compiling information similar to that in this example may expedite the preparation of progress estimates. This is only an “over-the-top” example, and its use is strictly optional. Experience will tell you exactly how much “pre-compiling” of information will be necessary to expedite your work at estimate time. **NOTE: A template report is being designed which will automatically provide you with tonnage sorted by JMF#, adjustment factor, etc. The template report will eliminate most of the additional researching in order to pay asphalt price adjustments. The report in the example below will not be needed.**
- REQUESTING CHANGES TO THE ESTIMATE WORKDAYS REPORT - If the estimate has been approved and paid and charged days must be changed, request this change via email to Construction Audit – Partial Unit. Construction Audit will make the change by using SiteManager’s DIARY ADJUSTMENT feature. You may view the change by navigating to DAILY WORK REPORTS – DIARY ADJUSTMENTS. After corrections are made, reprint the Workdays Report and re-submit for signatures as per current DOTD policy.
- WHERE ARE MY SUBCONTRACTORS?! PROBLEM: The approved subcontractors are not available from the pick list on the DWR CONTRACTOR’S TAB, so of course, they cannot be associated with any of their pay items on the WORK ITEM TAB. REASON: The approved sublets have not been entered into SiteManager. NOW WHAT TO DO?
  - Check the SUBS system in CICS. Are the subcontractors there? If so, call Kelly Folse, 225-379-1545, and ask that he load your contractors from SUBS into SiteManager.
  - If not, find the location of the pending sublets and try to expedite their approval.
  - **EXCEPTION:** Was this contract designed and let within your District? If so, subcontractors will not be added to the SUBS system. At present, you can call your District’s SMUR representative for help with loading the subcontractors for a “District-let” contract. Also, for District-let contracts, it is suggested that the approved sublets be scanned into SiteManager’s CORRESPONDENCE LOG.
  - **EXCEPTION:** Supplier/Haulers will appear on the DWR CONTRACTOR’S TAB but will NOT be assigned items. Therefore, they will NOT appear on the WORK ITEM TAB’S dropdown list.
- SUBLETTING OF ITEMS WHEN PAYMENT AMOUNT IS BASED ON % CONTRACT COMPLETE (Items 713-01, 727-01, 740-01, etc.) If the prime contractor opted to sublet a **portion** of one of these items to a subcontractor, **assign all pay quantities to the prime contractor**. From the item’s WORK ITEM TAB, enter the applicable percent pay and tab to the contractor field. ALWAYS choose the prime contractor even though the subletting contractor is also listed. Enter a note the Work Item Tab Remarks that the subcontractor performed the work. 

| PROJECT INFORMATION  |         |                   |        |                                |         |                       |  |                                |         |                   |        |
|--|---------|-------------------|--------|--------------------------------|---------|-----------------------|--|--------------------------------|---------|-------------------|--------|
| Contract No:   |         | 373-01-0015       |        |                                |         |                       |  |                                |         |                   |        |
| Name:  |         | US 171 - LA 28    |        |                                |         |                       |  |                                |         |                   |        |
| (W)orking or (C)alendar Days:  |         | W                 |        |                                |         |                       |  |                                |         |                   |        |
| Contract Time:   |         | 550               |        |                                |         |                       |  |                                |         |                   |        |
| Asphaltic Concrete Specs (mm/01/yy):                                     |         | Sep-03            |        |                                |         |                       |  |                                |         |                   |        |
| Contract Includes Pay Adjustment Provisions for Asphalt and Fuels (Y, N) |         | Y                 |        |                                |         |                       |  |                                |         |                   |        |
| If "Y":  |         |                   |        | Min QTY for Pay Adjmt          |         | Contract QTY          |  |                                |         |                   |        |
|  |         | 502-01            |        | 1,000.0                        |         | 93,953.3              |  | Tons                           |         |                   |        |
|  |         | 502-02            |        | 500.0                          |         |                       |  | Cu.Yds.                        |         |                   |        |
|  |         | 502-03            |        | 10,000.0                       |         |                       |  | Sq.Yds.                        |         |                   |        |
|  |         | 508-01            |        | 1,000.0                        |         |                       |  | Tons                           |         |                   |        |
| PLANT INFORMATION  |         |                   |        |                                |         |                       |  |                                |         |                   |        |
| Plant Code:  |         | H827              |        |                                |         |                       |  |                                |         |                   |        |
| Plant Name:  |         | Gilchrist         |        |                                |         |                       |  |                                |         |                   |        |
| Location:  |         | Alexandria        |        |                                |         |                       |  |                                |         |                   |        |
| Fuel Type:   |         | #2 Diesel         |        |                                |         |                       |  |                                |         |                   |        |
| JMF NO.: 101   |         |                   |        | JMF NO.: 102                   |         |                       |  | JMF NO.: 103                   |         |                   |        |
| Mix Type Code:   |         | 3 - Binder Course |        | Mix Type Code:                 |         | 1 - Incidental Paving |  | Mix Type Code:                 |         | 3 - Binder Course |        |
| Design Level:  |         | 1                 |        | Design Level:                  |         | 1                     |  | Design Level:                  |         | 1F                |        |
| Mix Use:   |         | 09 BC Rdwy        |        | Mix Use:                       |         | 01 WC Rdwy            |  | Mix Use:                       |         | 01 WC Rdwy        |        |
| Specs (mm/dd/yy):  |         | Sep-03            |        | Specs (mm/dd/yy):              |         | Sep-03                |  | Specs (mm/dd/yy):              |         | Sep-03            |        |
| AC Grade   |         | PG76-22M          |        | AC Grade                       |         | PG76-22M              |  | AC Grade                       |         | PG76-22M          |        |
| %AC/RAP Adjusted AC  |         | 4.5 3.7           |        | %AC/RAP Adjusted AC            |         | 4.7 4.7               |  | %AC/RAP Adjusted AC            |         | 4.5 3.6           |        |
| RAP (Y,N):   |         | Y                 |        | RAP (Y,N):                     |         | N                     |  | RAP (Y,N):                     |         | Y                 |        |
| %AC from RAP:  |         | 0.8               |        | %AC from RAP:                  |         |                       |  | %AC from RAP:                  |         | 0.9               |        |
| Theo. Maximum Specific Gravity   |         | 2.507             |        | Theo. Maximum Specific Gravity |         | 2.494                 |  | Theo. Maximum Specific Gravity |         | 2.475             |        |
| ADJ. FACTOR:   |         | 1.00              |        | ADJ. FACTOR:                   |         | 1.00                  |  | ADJ. FACTOR:                   |         | 1.00              |        |
| LOT NO.  | TONS PD | ESTI NO.          |        | LOT NO.                        | TONS PD | ESTI NO.              |  | LOT NO.                        | TONS PD | ESTI NO.          |        |
| 504  | 214.71  | 17                | Dec-04 |                                |         |                       |  | 608A                           | 214.71  | 21                | Apr-05 |
| 505A   | 102.48  | 17                | Dec-04 |                                |         |                       |  | 608B                           | 102.48  | 21                | Apr-05 |
| 506  | 799.06  | 17                | Dec-04 |                                |         |                       |  | 608C                           | 799.06  | 21                | Apr-05 |
| 508A   | 1016.34 | 17                | Dec-04 |                                |         |                       |  | 608D                           | 1016.34 | 21                | Apr-05 |
| 508B   | 1015.54 | 17                | Dec-04 |                                |         |                       |  | 608E                           | 1015.54 | 21                | Apr-05 |
| 508C   | 998.61  | 17                | Dec-04 |                                |         |                       |  |                                |         |                   | #N/A   |
| 508D   | 662.19  | 17                | Dec-04 |                                |         |                       |  |                                |         |                   | #N/A   |
|  |         | ESTI 17 TOTAL     |        |                                |         |                       |  |                                |         | ESTI 21 TOTAL     |        |
|  |         | 4808.93           |        |                                |         |                       |  |                                |         | 3148.13           |        |
| JMF NO.: 101   |         |                   |        | JMF NO.: 102                   |         |                       |  | JMF NO.: 103                   |         |                   |        |
| LOT NO.  | TONS PD | ESTI NO.          |        | LOT NO.                        | TONS PD | ESTI NO.              |  | LOT NO.                        | TONS PD | ESTI NO.          |        |
| 508D   | 600.41  | 18                | Jan-05 |                                |         |                       |  |                                |         |                   |        |
|  |         | ESTI 18 TOTAL     |        |                                |         |                       |  |                                |         |                   |        |
|  |         | 600.41            |        |                                |         |                       |  |                                |         |                   |        |
| 600  | 963.18  | 19                | Feb-05 |                                |         |                       |  |                                |         |                   |        |
| 601A   | 1016.09 | 19                | Feb-05 |                                |         |                       |  |                                |         |                   |        |
| 601B   | 1018.53 | 19                | Feb-05 |                                |         |                       |  |                                |         |                   |        |
| 601C   | 929.00  | 19                | Feb-05 |                                |         |                       |  |                                |         |                   |        |
|  |         | ESTI 19 TOTAL     |        |                                |         |                       |  |                                |         |                   |        |
|  |         | 3926.80           |        |                                |         |                       |  |                                |         |                   |        |
| 601C   | 79.04   | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 601D   | 986.90  | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 601E   | 1133.48 | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 602A   | 1006.84 | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 602B   | 1008.66 | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 602C   | 1002.09 | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 602D   | 988.10  | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 602E   | 989.99  | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 603A   | 1006.46 | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 603B   | 950.65  | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 603C   | 782.20  | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 603D   | 1002.37 | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 603E   | 938.28  | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 606V   | 1161.17 | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 607A   | 1005.04 | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
| 607B   | 424.65  | 20                | Mar-05 |                                |         |                       |  |                                |         |                   |        |
|  |         | ESTI 20 TOTAL     |        |                                |         |                       |  |                                |         |                   |        |
|  |         | 14465.92          |        |                                |         |                       |  |                                |         |                   |        |
| 607B   | 265.92  | 21                | Apr-05 |                                |         |                       |  |                                |         |                   |        |

SUGGESTION ONLY

## ASPHALT PENALTY/INCENTIVE ITEMS

***All asphalt tonnage is to be paid at 100% pay, with adjustments to be made later.***

502-01-PA Superpave Pay Adjustment (Penalty)  
502-01-LPI Superpave Lot Pay Incentive  
502-01-SPI Superpave Wearing Surface Incentive  
(To be renamed “Longitudinal Surface Tolerance Incentive Pay”)

- If total adjustment (as figured from Table 502-6 (to be Table 502-7 in new spec book)) is negative, then use Item 502-01-PA using the total adjustment as the quantity. This item’s negative unit price (-\$1.00) results in a negative amount.
- If total adjustment (as figured from Table 502-6 (to be Table 502-7 in new spec book)) is positive, then use Item 502-01-LPI using the total adjustment as the quantity. This item’s positive unit price (\$1.00) results in a positive amount.
- There are 4 criteria for Item 502-01-SPI, Longitudinal Surface Tolerance Incentive Pay:
  - Category-A Projects (per Table 502-7B (to be Table 5028B in new spec book))
  - No must-grinds
  - No pay penalties on surface tolerance for any lot
  - $IRI \leq 45$
- If these are met, then the wearing course travel lane quantity may receive an additional 5% to be paid under item 502-01-SPI

**Note:** If penalty/Incentive items are used (plan quantity increases from zero), a Change Order will be required before the final estimate can be generated.

See Examples – Next Page





## ASPHALT PAY PENALTY AND PAY INCENTIVE EXAMPLES

### Example 1: 502-01-PA Superpave Pay Adjustment (Penalty)

BID PRICE: \$50.00

ITEM NO: 502-01

| LOT NO                           | TONS | %PAY | 502-01<br>PAYMENT AMT | ADJUSTMENT<br>AMT |
|----------------------------------|------|------|-----------------------|-------------------|
| Lot 1                            | 1000 | 103% | \$50,000.00           | \$1,500.00        |
| Lot 2                            | 980  | 98%  | \$49,000.00           | -\$980.00         |
| Lot 3                            | 1200 | 90%  | \$60,000.00           | -\$6,000.00       |
| TOTAL PAYMENT FOR<br>ITEM 502-01 |      | 3180 | \$159,000.00          |                   |

Later, create new item, ITEM NO. **502-01-PA**

QTY for Item 502-01-PA

Unit Price for Item 502-01-PA

Adjustment AMT

|             |
|-------------|
| 5480.00     |
| -\$1.00     |
| -\$5,480.00 |

-\$5,480.00

### Example 2:

502-01-LPI Superpave Lot Pay Incentive

502-01-SPI Superpave Wearing Surface Incentive

(To be renamed "Longitudinal Surface Tolerance Incentive Pay")

BID PRICE: \$45.00

ITEM NO: 502-01-A-01

Assume Cat. A Project with no must-grinds, no pay penalties on surface tolerance and IRI ≤ 45

| LOT NO                           | TONS | %PAY | 502-01<br>PAYMENT AMT | ADJUSTMENT<br>AMT |
|----------------------------------|------|------|-----------------------|-------------------|
| Lot 1                            | 1000 | 103% | \$45,000.00           | \$1,350.00        |
| TOTAL PAYMENT FOR<br>ITEM 502-01 |      | 1000 | \$45,000.00           |                   |

Later, create new item, ITEM NO. **502-01-LPI**

QTY for Item 502-01-LPI

Unit Price for Item 502-01-LPI

Adjustment AMT

|            |
|------------|
| 1350.00    |
| \$1.00     |
| \$1,350.00 |

\$1,350.00

Also later, create new item, ITEM NO. **502-01-SPI**

|                                |            |             |
|--------------------------------|------------|-------------|
| Original AMT                   |            |             |
| PD                             |            | \$45,000.00 |
| Incentive%                     |            | 5.0%        |
| QTY for Item 502-01-SPI        | 2250.00    | \$2,250.00  |
| Unit Price for Item 502-01-SPI | \$1.00     |             |
| Adjustment AMT                 | \$2,250.00 |             |

## ESTIMATE SUBMITTAL AND APPROVAL PROCEDURE

- Generate the estimate
  - The P.E.'s Office Manager generates the estimate then -
    - Performs quantity checks as normally required by the P.E.
    - Checks for discrepancies
    - Check for fuel and asphalt adjustments
    - Check contract % complete
    - If discrepancies exist, pay quantity errors are found, additional pay items for fuel adjustments are required, or specific % earned items are required; the estimate should be deleted, the changes made, the appropriate pay items should be added, discrepancies should be resolved or overridden and the estimate should be re-generated.
- **The Office Manager approves the estimate only after the estimate is ready to transmit.**
  - Discrepancies must be resolved or overridden
  - **All** backup documentation required by current DOTD policy must have been received
  - All pay quantities are correct and all required pay items have been added
- After the Office Manager approves the estimate, the Office Manager opens Construction Notices within Lotus Notes, completes all fields and clicks on the button to notify the P.E. This begins the automated email process to notify the appropriate estimate approvers within DOTD. Within Lotus Notes:
  - Navigate FILE – DATABASE – OPEN – NOTES1/LADOTD/US – CONSTRUCTION NOTICES. Select PARTIAL ESTIMATE.
  - Be sure to include in the COMMENTS area any remarks that you may have placed in the DISCREPANCY REMARKS area within SITEMANAGER.
- The P.E. opens SiteManager and approves the Estimate.
  - The estimate is printed and sent to the contractor (via email or fax) for his approval
  - The contractor will sign the estimate and fax the signed copy back to the P.E.'s office where it will be maintained in the project files.
  - At the same time, a copy of the Weather & Workday Report will be sent to the contractor for their processing as per current DOTD Policy.
    - Fax or email the WWD Report to the contractor for signature
    - The contractor returns (via fax or mail) the signed WWD Report. (The contractor may opt not to sign and return the report.)
    - The P.E. signs the WWD Report
    - The WWD Report is sent to Construction Audit **only if signed by both the P.E. and the contractor.**
- Contractor approval of the Progress Estimate
  - **If the contractor has access to SiteManager**
    - The contractor opens SiteManager and approves the estimate at the contractor's level

- **If the contractor does not have access to SiteManager**
  - After the signed, estimate fax is received by the P.E. Office; the P.E. opens SiteManager and selects the CONTRACTOR category. The P.E. approves the estimate for the contractor.
    - If the contractor's signature has not been received by the 5<sup>th</sup> day from the estimate due date, the P.E. may open SiteManager and using the CONTRACTOR category, approve the estimate for the contractor. The P.E. should place a note in remarks, "Approved for the contractor without receipt of signature on the 5<sup>th</sup> day".
  - After Contractor approval, the P.E. or the Office Manager returns to the Construction Notices automated email and clicks on the button to notify the District Construction Engineer.
  - The District Construction Engineer will review the estimate and either approve or reject the estimate within SiteManager. Once approved, the DCE will open the Construction Notices automated email and click on the button to notify Construction Audit.
  - After processing the progress estimate, the Construction Audit Section opens the Construction Notices automated email and clicks the PROCESS button; this notifies the Office Manager that the estimate has gone to Accounting.

## **POLICY CHANGES**

1. It is no longer necessary to transmit paper copies, signed or otherwise, of the estimate to the Construction Audit Section. The copy of the estimate faxed to the contractor, signed by the contractor, and faxed back to the P.E.'s office will be maintained at the P.E.'s office in the project files.
2. The original copy of the Weather and Workday Report will be sent to the Construction Audit Section only after it has been signed by the Project Engineer and the Contractor. It will not be necessary to send unsigned copies.



## STOCKPILE MATERIAL GUIDE



Stockpile

## STOCKPILE MATERIAL GUIDE

See Section 109.07 of the Standard Specifications for requirements for advanced payment of stockpiled material.

A material is “stockpiled” for the purpose of receiving “advance” payment; that is, payment before the related contract item can be paid. As the material is “incorporated” and the contract item is paid, the stockpile advancement is reduced. Reduction continues to a balance of zero (\$0). When the contract item is paid in full, the stockpile balance should be zero (\$0). If not, it will be necessary to “close out” the stockpile. See **CLOSE OUT A STOCKPILE** later in this section.

### **ADD A STOCKPILE**

In SiteManager, a stockpile is added to a related pay item. A pay item may have more than one stockpile assigned to it. Also, a stockpile can be “re-used” if advancement of an additional invoice for the same material is later requested. See **REPLENISH A STOCKPILE** later in this section to re-use a stockpile.

- Values needed to add a stockpile
  - Quantity
  - Units
  - Unit Price
  - Conversion factor
  - Initial invoice payment (**amount to be advanced**)
- **Quantity**
- **Units**
  - The quantity and units of measure of the stockpile material should be expressed in the same terms that are used for the Contract Pay Item (work item).
  - Example: A bridge structure is paid for by the span. (Re-steel is not a separate pay item.) The contractor requests advance payment for the Re-steel to be used in bridge decks on this structure. The invoice, which was received with the request for advancement, listed 10,000 pounds of steel.
    - The **unit** of measure entered into SiteManager’s Stockpiled Materials window will be **span**.
    - The **quantity** entered into SiteManager’s Stockpiled Materials window will be **the number of spans** (1 or 2 or 3) that can be completed using the amount of steel on the invoice.
- **Conversion Factor:** is derived from the contract information. It indicates how many units of a stockpiled material item are needed to make one unit

## STOCKPILE MATERIAL GUIDE

of Contract Pay Item (work item). The default conversion factor is one (1.0). In the above example, the conversion factor is one (1.0).

- Another Example: Assume that the pay item is retaining wall, and that it is paid by the linear foot. If each linear foot of retaining wall requires three (3) bolts, the conversion factor is three (3).

- **Initial Invoice Payment:** This is the amount of the invoice **to be advanced**. This value cannot be more than the invoice amount, but it may be less. If this value is left at zero (0), no advancement will be made. The progress estimate will print with a \$0.00 amount in Stockpile Advancement.

**Note:** Quantity, Unit and Conversion Factor define how stockpiled material is **incorporated**. Initial Invoice Payment establishes the quantity to be **advanced**.

# STOCKPILE MATERIAL GUIDE

## Examples - Adding Stockpile Material in SiteManager

### NAVIGATE TO CONTRACT ADMINISTRATION – CONTRACT RECORDS – STOCKPILED MATERIALS

Two stockpile entry examples follow. Study the examples as you read the steps written below.

For each stockpile, an invoice and a request for advance payment for reinforcing steel is received. The invoice is in the amount of **\$2800.00**, and it lists **10,000** pounds of steel. The invoice is sent to us in pounds of steel. From the project plans, it is determined that **35** cubic yards of Class AA Concrete and **5000** pounds of reinforcing steel will be required for one bridge deck.

#### Stockpile No. 1

Perform the following calculations:

$10,000 \text{ lbs on invoice} / 5000 = 2$  - Advancement is requested for re-steel in **2** bridge decks.  
 $\$2800 \text{ advancement requested} / 2 = \$1400$  - Re-steel in the bridge decks will cost \$1400 per span.

Stockpile #1's unit of measure is span and the Item# is 805-10.

Navigate to Main Panel – Contract Administration – Contract Records – Stockpiled Materials. Select the Contract ID and the **Contract Pay Item**. Remember that for this example, no pay item exists for reinforcing steel. *(That would be too easy.)*

**Fields required to incorporate:**  
Enter description, invoice date and invoice number. Enter the quantity and the unit of the pay item that will consume the advanced material; i.e. **2. Two (2) spans will require the 10,000 lbs of deck steel in the stockpile for which advanced payment has been requested.** Enter the price of the re-steel **per bridge deck**, i.e. \$1400.00. Enter a Conversion Factor of 1.

**Field required to advance:**  
Enter the amount of the invoice to be advanced in the field "Initial Invoice Payment". *I cannot think of a good reason why this would be different from the calculated total.* If the invoice is for \$2800.00, enter \$2800.00. **This field is the advancement. If this field remains zero (0), the advance payment will not be made.**

- Save the entry and return to the Main Panel.
- NOTE: To add another stockpile (different material), click "NEW". (Example: An additional advancement was requested for concrete aggregate used in bridge decks.)



# STOCKPILE MATERIAL GUIDE

- Enter a DWR and pay one (1) span of Item 805-10.

**AASHTO SiteManager**

**Daily Work Reports**

Contract ID: 000-00-0005 Inspector: Monk, Paula Date: 02/21/05

Project Nbr: 000-00-0005 Line Item Nbr: 0901 Item Code: 805-10 Category Nbr: STP

Item Desc: Bridge Superstructure & Substructure Unit Price: \$15,000.00000

Supp Desc 1: S-0901

Supp Desc 2: Item 805-10 5-Span Bridge

Qty Reported to Date: 1.000 Qty Authorized to Date: 0.000 Units Type: span

Qty Installed to Date: 0.000 Bid Qty: 0.000 Pay To Plan Qty: ☐

Qty Paid to Date: 0.000 Current Contract Qty: 5.000

Status: Active

| Loc Seq Nbr | Location Installed    | Placed Qty | Plan Page Number | Templ Used |
|-------------|-----------------------|------------|------------------|------------|
| 1           | Field Book and Pg No. | 1.000      |                  |            |

Placed Qty: 1.000 Plan Page Nbr: 0 Contractor: AMETHYST CONSTRUCTION, INC. \*\* PRIME \*\*

Loc Seq Nbr: 1 Location: Field Book and Pg No. Measured Indicator: ☐

| From | Station | Offset | Distance | To | Station | Offset | Distance |
|------|---------|--------|----------|----|---------|--------|----------|
|      | 0.000   |        | 0.000    |    | 0.000   |        | 0.000    |

**Material Component**

| Material Component | Cont Est Matrl Qty | Satisf Repr Matrl Qty | Reprt Matrl Qty | Matrl Unit |
|--------------------|--------------------|-----------------------|-----------------|------------|
|                    |                    |                       |                 |            |

- Authorize the DWR and generate a progress estimate.
- View the generated estimate and note the automated entries for stockpile materials.

State Contract Number: 000-00-0005 Estimate Number: 1

Highway: US 80 Parish: Ouachita

From Sunday, August 29, 2004 Thru Tuesday, February 22, 2005 Date Prepared: Tuesday, February 22, 2005

Contractor: AMETHYST CONSTRUCTION, INC.

**Schedule of Work Items**

| Line Number                      | Item Number | Unit | Estimate Quantity | Unit Price                 | \$ Pay      |
|----------------------------------|-------------|------|-------------------|----------------------------|-------------|
| Item Description                 |             |      | Qty. Paid to Date |                            |             |
| 000-00-0005                      |             |      |                   |                            |             |
| STP-0500(128)                    |             |      |                   |                            |             |
| 0901                             | 805-10      | span | 1                 | Previously Paid:           | \$0.00      |
| S-0901 Item 805-10 5-Span Bridge |             |      | 1                 | \$15,000.00                | \$15,000.00 |
|                                  |             |      |                   | STP:                       | \$15,000.00 |
|                                  |             |      |                   | Stockpile Advanced:        | 2800        |
|                                  |             |      |                   | Stockpile Incorporated:    | -1400       |
|                                  |             |      |                   | Project Total:             | \$16,400.00 |
|                                  |             |      |                   | Project Total to Date:     | \$16,400.00 |
|                                  |             |      |                   | Grand Total This Estimate: | \$16,400.00 |
|                                  |             |      |                   | Grand Total To Date:       | \$16,400.00 |

**Summary of Contract Time**

Contract Time Allowed: 240

One span is paid in the normal way.

The total invoice is advanced. The amount represents the price of re-steel in 2 bridge decks.

One span was paid and therefore the price of re-steel in one bridge deck was incorporated.

## STOCKPILE MATERIAL GUIDE

- Return to Stockpile Materials and note the changes in quantity.

**AASHTO SiteManager**

File Edit Services Window Help

**Stockpiled Materials**

Contract ID: 000-00-0005 Project Nbr: 000-00-0005 Catg Nbr: STP Line Itm Nbr: 0901  
Units: span Unit Price: 15000 Bid Quantity: 0  
Item Description: Bridge Superstructure & Substructure  
Supp Description 1: S-0901  
Supp Description 2: Item 805-10 5-Span Bridge

Matl Code: Stockpiled Desc: Re-Steel in Bridge Decks Status: Active

| Invoice Date | Invoice Number | Quantity | Units | Unit Price    |
|--------------|----------------|----------|-------|---------------|
| 02/22/05     | 1234           | 2.000    | Span  | \$1,400.00000 |

| Conv Factor | Conv Unit Price | Invoice Amt   | Initial Invoice Payment | Matl Sn | Replenish Sn |
|-------------|-----------------|---------------|-------------------------|---------|--------------|
| 1.00000     | \$1,400.00000   | \$2,800.00000 | \$2,800.00              | 1       | 0            |

| Remaining Qty | Installed Qty To Date | Paid To Date |
|---------------|-----------------------|--------------|
| 1             | 1.000                 | \$2,800.00   |

Notice that a quantity of one (1) remains in stockpile, and a quantity of one (1) has been incorporated. Also, notice that the entire invoice has been advanced (paid to the contractor).

Ready Server PROD DM d0822

# STOCKPILE MATERIAL GUIDE

## Stockpile No. 2

Perform the following calculations:

$$10,000 / 5000 = 2$$

Advancement is requested for re-steel in 2 bridge decks.

$$\$2800 / 2 = \$1400$$

Re-steel in the bridge decks will cost \$1400 per span.

$$1400 / 35 = \$40$$

Cost per cubic yard of re-steel in one bridge deck.

$$35 \times 2 = 70 \text{ CY} \times \$40 = \$2800$$

Cost of re-steel in two bridge decks.

Stockpile #2's unit of measure is cubic yard and the Item# is S-Cubic Yard (or S-101). Assume that re-steel is not a separate pay item.

Navigate to Main Panel – Contract Administration – Contract Records – Stockpiled Materials. Select the Contract ID and the **Contract Pay Item**. Remember that for this example, no pay item exists for reinforcing steel.

Contract ID: 000-00-0005 Project Nbr: 000-00-0005 Catg Nbr: STP Line Item Nbr: 0902

Units: Cu Yd Unit Price: 40 Bid Quantity: 0

Item: S-0902  
Item S-101

Stockpiled Desc: Re-steel in Bridge Decks Status: Open

| Invoice Date | Invoice Number | Quantity | Units      | Unit Price |
|--------------|----------------|----------|------------|------------|
| 02/22/05     | 5678           | 70.000   | Cubic yard | \$40.00000 |

| Conv Factor | Conv Unit Price | Invoice Amt   | Initial Invoice Payment | Matl Sn | Replenish Sn |
|-------------|-----------------|---------------|-------------------------|---------|--------------|
| 1.00000     | \$40.00000      | \$2,800.00000 | \$2,800.00              | 1       | 0            |

| Remaining Qty | Installed Qty To Date | Paid To Date |
|---------------|-----------------------|--------------|
| 70.000        | 0.000                 | \$0.00       |

For each cubic yard of concrete paid under Item S-101, \$40 dollars will be deducted from stockpile until 70 cubic yards are paid. At that time \$2800 will have been incorporated and the stockpile is "zero-ed" out. 70 Cubic Yards completes 2 bridge decks and totals \$2800, which is the total amount of advancement.

Each time that you pay for one deck under Item 805-10 or each time you pay for a cubic yard of concrete under Item S-101, money will be deducted. The previously advanced money for the applicable reinforcing steel will be deducted from the progress estimate. This will continue until the stockpile reaches \$0.00. *If for some reason the item is completed and stockpile money still remains, follow the steps in **CLOSE OUT A STOCKPILE** later in this section.*

## STOCKPILE MATERIAL GUIDE

### REPLENISHING A STOCKPILE MATERIAL ITEM

Use replenish when a second advancement is requested for the same material.

1. Print the screen or otherwise save the information from your existing stockpile.
2. Click on the Replenish Material from the Services Menu (see red arrow below)

AASHTO SiteManager

File Edit Services Window Help

Choose Keys Ctrl+Alt+K

Stock

Process Status  
Close Out Balance Ctrl+Shift+B  
Replenish Material

Contract ID: [blank] Project Nbr: 00025947N01 Catg Nbr: 0005 Line Itm Nbr: 0035

Units: Linear Feet Unit Price: 23.93000 Bid Quantity: 206.000

Item Description: 15" PIPE \*

Supp Description 1: [blank]  
Supp Description 2: [blank]

Matl Code: [blank] Stockpiled Desc: 15" arch pipe Status: Open

| Invoice Date | Invoice Number | Quantity | Units       | Unit Price |
|--------------|----------------|----------|-------------|------------|
| 01/12/05     | 12345678       | 100.000  | Linear Feet | \$23.93000 |

| Conv Factor | Conv Unit Price | Invoice Amt   | Initial Invoice Payment | Matl Sn | Replenish Sn |
|-------------|-----------------|---------------|-------------------------|---------|--------------|
| 1.00000     | \$23.93000      | \$2,393.00000 | \$ .00                  | 1       | 0            |

| Remaining Qty | Installed Qty To Date | Paid To Date |
|---------------|-----------------------|--------------|
| 100.000       | .000                  | \$ .00       |

AASHTO SiteManager

File Edit Services Window Help

Stockpiled Materials

Contract ID: TRAIN\_38 Project Nbr: 00025947N01 Catg Nbr: 0005 Line Itm Nbr: 0035

Units: Linear Feet Unit Price: 23.93000 Bid Quantity: 206.000

Item Description: 15" PIPE \*

Supp Description 1: [blank]  
Supp Description 2: [blank]

Matl Code: [blank] Stockpiled Desc: 15" arch pipe Status: Open

| Invoice Date | Invoice Number | Quantity | Units       | Unit Price |
|--------------|----------------|----------|-------------|------------|
| 01/13/05     | 12345678       | .000     | Linear Feet | \$23.93000 |

| Conv Factor | Conv Unit Price | Invoice Amt | Initial Invoice Payment | Matl Sn | Replenish Sn |
|-------------|-----------------|-------------|-------------------------|---------|--------------|
| 1.00000     | \$23.93000      | \$0.00000   | \$ .00                  | 1       | 1            |

| Remaining Qty | Installed Qty To Date | Paid To Date |
|---------------|-----------------------|--------------|
| 0             | .000                  | \$ .00       |

3. Replenish zero's out Remaining Quantity
4. Re-enter quantity (any remaining + new, additional amounts) and update unit price, if necessary. Description and Units can also be changed.
5. Enter Initial Invoice Payment (amount to be advanced on the next estimate)
6. Save

NOTE: When replenishing a stockpile, all the above highlighted fields can be updated. Conv. Unit Price and Invoice Amt. will recalculate.

This stockpile has (1) replenishment

## STOCKPILE MATERIAL GUIDE

### **CLOSE OUT A STOCKPILE MATERIAL ITEM**

A stockpile can be closed out at any time, which will reduce the stockpile to zero upon payment of the next estimate. Reasons for closing a stockpile might include:

- Certified, paid invoices were not received within the required time frame
  - Material was incorporated within less than 90 days
  - The related contract item is complete, but a balance still exists in the stockpile
- 
- Select the Close-Out Balance from the Services Menu. Zero is entered in the Remaining Quantity field. The status changes to close. All fields are protected.

The screenshot shows the AASHTO SiteManager application window. The 'Stock' menu is open, showing options: 'Process Status' and 'Close Out Balance Ctrl+Shift+B'. A red arrow points to the 'Close Out Balance' option. Below the menu, the form displays contract and project information:

Contract ID: TRN\_IN\_38 Project Nbr: 00025947N01 Catg Nbr: 0005 Line Itm Nbr: 0035  
Units: Linear Feet Unit Price: 23.93000 Bid Quantity: 206.000  
Item Description: 15" PIPE \*  
Supp Description 1:  
Supp Description 2:

Below this, the 'Stock' section shows:

Matl Code: Stockpiled Desc: 15" arch pipe Status: Open

| Invoice Date | Invoice Number | Quantity | Units       | Unit Price |
|--------------|----------------|----------|-------------|------------|
| 01/13/05     | 12345678       | .000     | Linear Feet | \$23.93000 |

| Conv Factor | Conv Unit Price | Invoice Amt | Initial Invoice Payment | Matl Sn | Replenish Sn |
|-------------|-----------------|-------------|-------------------------|---------|--------------|
| 1.00000     | \$23.93000      | \$0.00000   | \$0.00                  | 1       | 1            |

| Remaining Qty | Installed Qty To Date | Paid To Date |
|---------------|-----------------------|--------------|
| 0             | .000                  | \$0.00       |

- If the Progress Estimate Report includes a Stockpile Close-Out Balance, the Office Manager will add the reason for the depletion of this stockpile to the comments area of the Lotus Notes automated email notification.

# STOCKPILE MATERIAL GUIDE

## STOCKPILE MATERIALS GENERAL NOTES

- Only someone in the Office Manager (OM) Group can add Stockpile Materials.
- A stockpile cannot be adjusted if its related contract item is paid on a pending progress estimate. The estimate must be deleted before adjusting the stockpile.
- **SiteManager will automatically reduce the stockpile upon the first payment of the related contract item.** If this is not the intent, stockpile advancement must be paid using an Item similar to 000-00-SP. This item will be added upon request by Construction Audit. This item should be added only when SiteManager's stockpile system will produce undesirable results.

### Example:

The contractor has requested advance payment for 160 feet of 84" concrete pipe joints which are stockpiled at the plant, and which are to be incorporated during construction of the southbound roadway. Construction of the southbound roadway will begin within the next 12 months. Presently, the contractor is working on installing 88 feet of this same pipe (same item number) on the northbound roadway. A progress estimate will be due by the end of the week, and approximately half the pipe on the northbound roadway is complete and scheduled to be paid.

### PREFERRED METHOD OF ADVANCEMENT:

The 90-day storage requirement (Subsection 109.07(a)) will be waived by the P.E. The contractor will request advance payment for ALL 84" pipe ( $160 + 88 = 240$ ). Advanced payment will be made on the upcoming estimate and incorporation will also begin on this next estimate.

### ALTERNATE METHOD OF ADVANCEMENT:

The contractor will request advance payment for the pipe on the southbound roadway only (160'). The Office Manager will request via email to Construction Audit Partial Unit that Item 000-00-SP be added to the contract. **(A change order will be required at the end of the job.)** As in ESTI, advance payment will be made on the next estimate under Item 000-00-SP. As in ESTI, when the contractor begins installation of the pipe on the southbound roadway, the Office Manager will begin reducing the stockpile also by using Item 000-00-SP.

😊 Good News: A possible, future update to SiteManager's programming code will allow a CONVERSION FACTOR (definition on PG 3-2) of zero (0). This update should eliminate the need for Item 000-00-SP.

## NEW STOCKPILE VS REPLENISH STOCKPILE

- **New Stockpile:**
  - Create a new stockpile for the first advancement related to a contract pay item.
  - Create a new stockpile when an additional advancement related to a contract item was requested **AFTER** the first advancement has been "zeroed out" or "closed out".
- **Replenish Stockpile:**
  - Replenish a stockpile when an additional advancement related to a contract item was requested **BEFORE** the first advancement has been "zeroed out" or "closed out". **Add the remaining quantity to the new, additional amount so that the replenish quantity is the sum of both.**

## REPORTS

- See SiteManager Report #20 for stockpile summary reports.

# CHANGE ORDERS

## CREATING A CHANGE ORDER

Office Manager, Project Supervisor and Project Engineer groups have authority to create and maintain change orders.

- View or print Contract Item List (#1 on Intranet SM Report Site) to determine line item number.
- Log onto SiteManager
- Click on Change Orders
- Click on Change Order Maintenance
- Click on Header

### To add the Change Order Header Information

- Navigate to SERVICES – CHOOSE KEYS. Choose the contract. A new CO number will come up
- Fill in the Description field (brief description of CO)
  - (The description entered here will be displayed when selecting the CO to view from the intranet, SM Reports, Report No. 5)
- Click on Drop down box and select the reason code
  - Refer to the current [CHANGE ORDER REASON\(S\) CODE CHART](#)
- Click on Drop down box and select the category
  - Refer to the current [CHANGE ORDER CATEGORY WORKSHEET](#)
- At present, ALWAYS check the “Override Approvals” box
  - (Approvers may be automated in the near future, at which time, overriding approval rules will not be necessary.)
- Check the following applicable fields:
  - Overrun/under run (use when modifying an existing item)
  - Extra Work (use when creating a new item)
  - Time Adjustment (when time is adjusted by the CO)
  - ~~Force Account~~ (should never be used)
  - ~~Final Quantity~~ (should never be used)

**AASHTO SiteManager**

File Services Window Help

**Header**

CO Created by: Monk, Paula

Status: Pending Approval Level: OVERRIDE

Description: Adjust to As-Built Qtys and add Incentive Pay

Reason Code: 1D-Incorrect Plans - Other

CO Type: Category 4

☒ Override Approval Rules

Functions:

- ☒ Overrun/Undererrur
- ☒ Extra Work
- ☒ Time Adjustment
- ☐ Force Account
- ☐ Zero Dollar
- ☐ Final Quantity

Reference to:

Dispute: Force Account:

Federal: 00/00/00 Local: 00/00/00

On: 04/20/05

Bid Contract Amt: \$742,286.05

Current Contract Amt: \$742,286.05

CO Amount: \$-23,736.36

At this time, do NOT check Force Account.

**STOP**

**NEVER! Select FINAL QUANTITY. If Final Quantity is checked and the CO is approved, ALL items on the change order will be PERMANENTLY LOCKED. LA DOTD WILL NOT USE FINAL QUANTITY.**


Ready Server PROD QM Id0822



- Click the Save Icon 

To add items to the Change Order, go to the Change Order Items window

- From the menu bar of the Header window select SERVICES – CO ITEMS
- **To modify an existing contract item:**
  - From the menu bar of the Change Order Items window select SERVICES– NEW CONTRACT ITEM
  - Choose your item from the list
  - Enter a Change Order Item Description.
    - This *optional* description will be displayed in the Change Order Explanations window – to the right of the project and line item number - in the selection pick list - for Explanations Applied to Specific Items. See the screen print of the Change Order Explanations window later in this section
      - When selecting from a list of several line item numbers, it is helpful to have a description next to each line item number. Therefore, a helpful description would be the ***item number*** along with any other identifying information. Examples:
        - 401-02 Aggregate Surf. Course (or)
        - 401-02 under 7.8%
  - In the quantity field enter the quantity added or subtracted from the original quantity. This entry will be the **quantity of change**, and it can be either positive or negative.
    - If plan quantity is 1000 square yards and required quantity is 1500 square yards, enter 500 in the quantity field.
    - If plan quantity is 1500 square yards and required quantity is 1000 square yards, enter -500 in the quantity field.
- **To create a new item:**
  - From the menu bar of the Change Order Items window select SERVICES– NEW CONTRACT ITEM
  - Go to NEW CONTRACT ITEM tab
  - Select Project Number
    - **If all items are being paid under the lead project number, select the lead project number only.**
  - Select Category Number
  - Enter new line item number. Review the Contract Item List (#1 on Intranet SM Report Site) to determine the line item number.
  - Item Code – Right click to choose item number (new Specialty Items will be an “S-“and the line item it represents –i.e. S-9001). For more information on Specialty Items, see General Notes later in this section.


- Enter the unit price.
  - Rebates will have a negative \$1 (-\$1) and a positive quantity
- Enter the supplemental description
  - If this is a new Specialty Item, enter the Item Number on the first line of the supplemental description. Example S-9001
- Go to the CHANGE ORDER ITEM tab
- Enter the quantity
  - **Never create a new item using a negative quantity**
  - **Never create a new item with a zero(0) quantity**
- Click Save after entering each item 


**Note:**

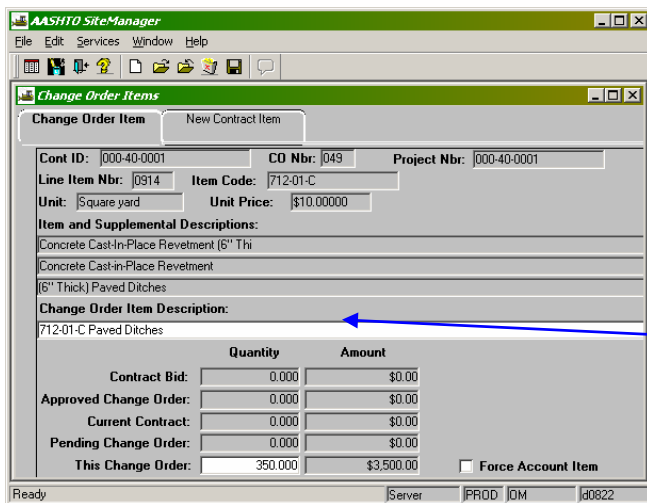
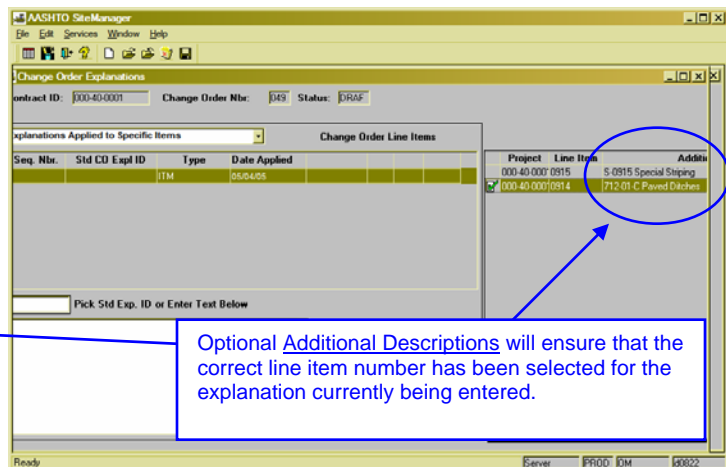
If a new item is established by a change order, the new unit price must be substantiated by one of the following methods and documented in the Change Order. In the engineer's explanation area on the change order, the project engineer must state which one of these three methods is used to establish the cost of the new item.


- Cost breakdown in accordance with Section 109.04 of the Standard Specifications.
- Favorable comparison with the current statewide weighted average index.
- Comparison for bid prices or negotiated prices from other projects with similar quantities, type of work, and degree of difficulty and in the same geographical area.

To add explanations to the Change Order, go to the Change Order Explanations window

- From the menu bar of the Change Order Items window select SERVICES – CO EXPLANATIONS
- See CO example later in this section. Depending on the CO – descriptions can be any of the following:
  - General
  - Applied to Specific Items or
  - Applied to All Items
    - Explanations Applied to All Items will repeat the explanation under each item
- Enter the General Explanation. This explanation will form the 1<sup>st</sup> paragraphs of the change order. This explanation usually describes the scope and the purpose of the change order
- Click Save after entering the General Explanation 

- If specific pay items are involved, enter a new Explanation Applied to Specific Items for each affected pay item. After typing the explanation, select the appropriate line item number from the pick list to the right of the screen.
  - If the item number was previously entered in the optional Change Order Item Description field, the item number will display to the right of the line item number. A selected line item will have a checkmark (✓) preceding its line item number. See the screen print example below.
- Click Save after entering each Item Specific Explanation 

- Enter the 2<sup>nd</sup> (last) General Explanation. This explanation will form the last paragraphs of the change order. This explanation is a summary. It will describe specification changes or days added if applicable.
  - **All Change Order Attachments are to be listed in the CO's last General Explanation.**
- Click Save after entering the 2<sup>nd</sup> General Explanation 



If days are to be added by CO, go to MAIN PANEL-CHANGE ORDERS-CHANGE ORDER MAINTENANCE – CHANGE ORDER TIME ADJUSTMENTS

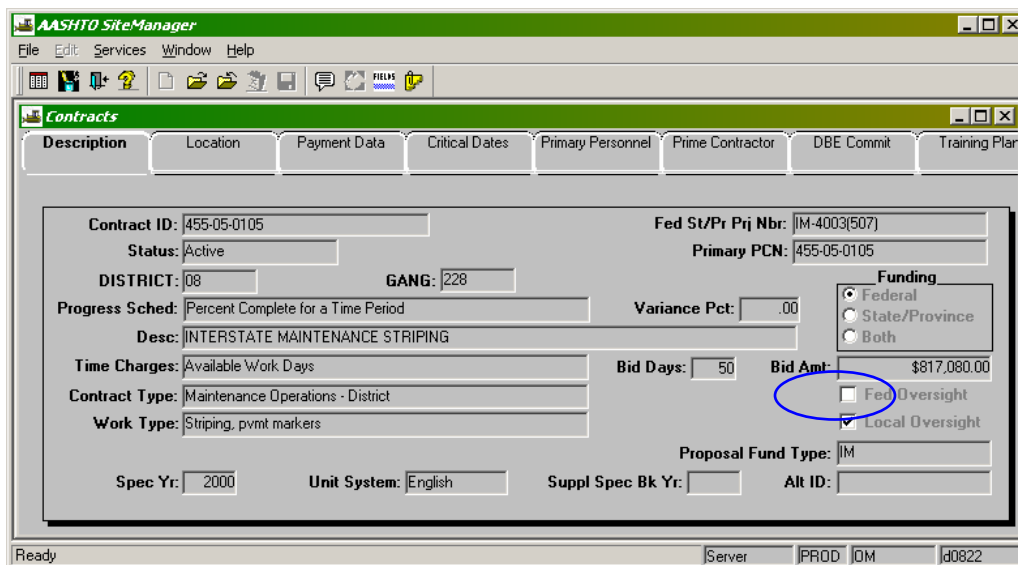
- Enter amount of days, click on “Contract Completion” button and enter explanation.
- Click the Save Icon 

To attach required documents to the Change Order

- Navigate to MAIN PANEL – CHANGE ORDERS – CHANGE ORDER MAINTENANCE – HEADER
- Refer to Attaching a Document on Page 1 – 6 of this Manual.

## To assign approvers for a Change Order

- From the menu bar of the Header window select SERVICES – CALCULATE CHANGE ORDER
- Click the “Status” drop down box – Click “Pending”
- Click on Save 
- A message box will say “Are you sure.... “. Click “Yes”
- Groups for Approval Box will appear
- Click “New” 
- Follow the approval group list for the category of the CO
  - See [Change Order Approval Levels List](#) later in this section
  - Click on the appropriate “Group” and “Name”
  - To see if FHWA will review CO’s for the contract
    - Go to the Mainframe- CICS-LETS. Key in project #, go to Screen 2 and look at the bottom right under FED REV. It will say Y or N.
    - Also, within SiteManager, navigate to MAIN PANEL-CONTRACT ADMINISTRATION-CONTRACTS. See screen print below. If FEDERAL OVERSIGHT is checked, FHWA will review the Change Order



NOTE: Federal Review is considered only for Category 1 and Category 2 Change Orders.

### To view the Change Order and Send to Contractor

- Go to intranet SM reports – Report No. 5
- You may save the Change Order Report to your project folder, and it will be ready to e-mail to the Contractor
  - While viewing the report, go to “File”, “Save As”
  - Browse for your folder
  - Change the name to an appropriate CO name and number
  - Save in HTML format
- Or you may print the CO and fax it to the contractor

**IMPORTANT: A validation number is assigned to the CO when the Project Engineer electronically approves. Be sure to adhere to the Department’s current submittal procedure when using email and fax. See the Change Order Submittal Procedure later in this section.**

# Change Order Submittal Procedure

1. Create Change Order within SiteManager- Be sure to check the box “Override Approval Rules”.
2. Change from DRAFT to PENDING
3. Enter the approvers from P.E. through the District Administration Level. If this is a Cat. 3 or 4 Change Order then the next and final level is the COP. If it is a Cat. 1 or 2 enter the HQ Level Construction Managers group with the appropriate Area Engineer and then enter either the Chief Engineer or Chief Construction Engineer group and enter either J. McCain or Mike Ricca depending on content. They will insert additional approval levels and individuals as required, depending on category and nature of the Change Order. The final level should be the COP group with the appropriate individual. **Approvers must be re-entered each time the CO is changed back to draft, then back to pending.**
  - a. See the categorized List of Approvers later in this section
4. Office manager approves Change Order (Optional)
5. † PE electronically approves Change Order. PE Office prints Change Order **(the original)** for Signatures – if the change order is put back into DRAFT status after it is printed it will be necessary to reprint before obtaining signatures. **PE must electronically approve the CO before the original is printed.**
6. PE signs the original Change Order.

† (SiteManager generates a unique serial number whenever the change order is changed from draft status to pending status – thus if you print it, then change it back to draft and then back to pending that number will be different and thus the number shown on the printed copy will not agree with number stored with the change order in SiteManager. The number is used to assure that the signed copy is the same as what is stored in SiteManager.)

## At this point the electronic version and the paper version take on their own routes as follows:

| Electronic Procedure   | Paper Trail  |
|--|--|
| <ol style="list-style-type: none"> <li>1. PE’s office notifies contractor of CO awaiting their approval. <ul style="list-style-type: none"> <li>• <i>if contractor has access to SiteManager</i> – Contractor reviews and approves CO</li> <li>• <i>if contractor does not have access to SiteManager</i> – P. E. faxes the CO to the contractor.<sup>1</sup> The contractor will sign the CO and immediately send a <b>fax copy of the signature to the PE.</b> Upon receipt of the faxed CO signature, the PE will approve the electronic CO for the contractor.</li> </ul> </li> <li>2. The P.E. will fax a copy to the <b>COP (be sure it is signed by both the PE and Contractor).</b><sup>1</sup></li> <li>3. PE’s office notifies DCE via email that CO is ready for their review/approval. (Optionally, to aid with review, the PE may fax the DCE a copy of the CO with the contractor’s faxed signature).<sup>1</sup> The District Administration approver(s) should review and approve CO.</li> <li>4. From this point forward PE office should check CO order status on SiteManager and communicate with the appropriate person to assure the timely progression of the CO approval cycle.</li> </ol> <p><b>Failure to complete the electronic procedure will result in an incomplete (pending only) CO.</b></p> | <p><i>The paper trail begins when the PE receives, from the contractor, the signed original of the Change Order. Usually, there is a significant time lapse from the completion of the Electronic Procedure and the completion of the paper trail. The Electronic Signature and the Paper Trail should be considered separate and handled accordingly.</i></p> <ol style="list-style-type: none"> <li>1. The CO which has been electronically approved by the PE is printed and signed by the PE. (If the contractor does not have access to SM, the PE office may fill-in the date of the contractor’s electronic signature.) The PE office sends the CO to the contractor for his signature.</li> <li>2. When the PE’s office receives the original CO back from the contractor (<b>with PE and contractor original signatures</b>), the PE office will make all necessary copies. The original <b>w/attachments</b> is then forwarded to the DCE for further handling.<sup>2</sup></li> <li>3. The District Administration will then sign the CO (<i>at this point the District Administration has in all likely hood already electronically approved the CO</i>) and process the original for transmittal to HQ’s to the COP.</li> <li>4. The COP will be track the receipt of the CO and forward it for the rest of the signatures required by current DOTD Policy. (For checking status, see FINAL STEP, next page.)</li> </ol> <p><b>Failure to complete the paper procedure will prevent the processing of the Final Estimate. All Change Orders with original signatures must be at HQ’s when the project is finalized.</b></p> |

<sup>1</sup> See examples of fax cover sheet comments in *Change Order General Notes* later in this section.

<sup>2</sup> Additional file copies may be necessary. Check current policy requirements with your PE, your District Office and with HQ.

**FINAL STEP:** Once the **electronic** version of the CO is approved up to the last level, the COP, will, prior to approving, check to see if she has the fax of the signed CO submitted in the Electronic Procedure - Step 4. If she does not have this faxed copy then she will await the receipt of **signed original** from the Paper Trail - Step 3 before approving the CO.

To check Change Order Status of the **Paper Trail** in SiteManager, navigate to MAIN PANEL - CHANGE ORDER – CHANGE ORDER MAINTENANCE – HEADER – FIELDS.

**AASHTO SiteManager**  
File Services Window Help

**Header**

Federal: 00/00/00 Local: 00/00/00

CO Created by: Monk, Paula On: 04/20/05

Status: Pending Approval Level: OVERRIDE

Description: Adjust to As-Built Qtys and add Incentive Pay

Reason Code: 1D-Incorrect Plans - Other

CO Type: Category 4

☒ Override Approval Rules ☐ Emergency Work

Functions: ☒ Overrun/Underrun ☐ Force Account  
☒ Extra Work ☐ Zero Dollar  
☐ Time Adjustment ☐ Final Quantity

Bid Contract Amt: \$742,286.05  
Current Contract Amt: \$742,286.05  
CO Amount: \$-23,736.36

Reference to:  
Dispute: Force Account:

Ready Server PROD OM id0822

The COP records the progress of the CO's paper trail in **FIELDS**.

**AASHTO SiteManager**  
File Services Window Help

**Header**

Signed Fax Rec'd: 04/26/05 Sent to CCE: 00/00/00 Validation #: 5115111557

Signed Original Rec'd: 00/00/00 Sent to CE: 00/00/00

Ori Sent to Area Eng'r: 00/00/00 Sent to Fed: 00/00/00

Area Engineer: CO Complete: 00/00/00

Ori Sent to Staff Eng'r: 00/00/00

Staff Engineer:

Reference to:  
Dispute: Force Account:

Ready Server PROD OM id0822

**NOTE:** The validation number on the faxed copy of the CO which has been signed by the contractor, the validation number on the CO with original signatures and the validation number listed in **FIELDS** on the **CO HEADER SCREEN** must all be the same number. **If this number is different, the CO will not be approved at the final level until it is reprinted and circulated for signatures.**

Approval levels to be entered by the office manager:

Approval Levels are subject to change.  
Refer to current DOTD policy.

| <b>CO APPROVAL LEVELS – DISTRICT 08</b> |                                    |   |
|---|------------------------------------|---|
| <b>CATEGORY</b>                         | <b>APPROVAL LEVEL</b>              |   |
| 1-2-3-4                                 | <b>OM</b> - Office Manager         | This level is optional  |
| 1-2-3-4                                 | <b>PE</b> – Project Engineer       | Select Your Project Engineer  |
| 1-2-3-4                                 | <b>CT</b> - Contractor             | Unless contractor has access to SiteManager, Select Your Project Engineer   |
| <b>DISTRICT ADMINISTRATION</b>          |                                    |   |
| 1-2-3-4                                 | <b>DCE</b>                         | Asst. DCE (Select R. Mays)  |
| 1-2-3-4                                 | <b>DCE</b>                         | DCE (Select J. Gagnard)   |
| 1-2-3                                   | <b>DCE</b>                         | DA (Select W. Marchand)   |
| <b>HQ APPROVERS</b>                     |                                    |   |
| 1-2                                     | <b>CM</b> - Area Engineer          | <b>ONLY FOR Cat. 1 &amp; 2</b>  |
| 2                                       | <b>CCE</b> - Chief Const. Engineer | Select Mike Ricca for structures or J. McCain for all other<br><b>Note: If CO needs to go to the next level, either Jay or Mike will enter the approver</b> |
| 1                                       | <b>CE</b> - Chief Engineer         | Select Mike Ricca for structures or J. McCain for all other<br><b>Note: If CO needs to go to the next level, either Jay or Mike will enter the approver</b> |
| 1-2-3-4                                 | <b>CA</b> - COP                    | Select Venice Grigsby   |

| <b>CO APPROVAL LEVELS – Statewide Requirements</b> |                                    |   |
|--|------------------------------------|---|
| <b>CATEGORY</b>                                    | <b>APPROVAL LEVEL</b>              |   |
| 1-2-3-4  | <b>PE</b> – Project Engineer       | Select Your Project Engineer  |
| 1-2-3-4  | <b>CT</b> - Contractor             | Unless contractor has access to SiteManager, Select Project Engineer  |
| <b>DISTRICT ADMINISTRATION</b>                     |                                    |   |
| 1-2-3-4  | <b>DCE</b>                         | Select Your District Construction Engineer  |
| <b>HQ APPROVERS</b>                                |                                    |   |
| 1-2  | <b>CM</b> - Area Engineer          | <b>ONLY FOR Cat. 1 &amp; 2</b>  |
| 2  | <b>CCE</b> - Chief Const. Engineer | Select Mike Ricca for structures or J. McCain for all other<br><b>Note: If CO needs to go to the next level, either Jay or Mike will enter the approver</b> |
| 1  | <b>CE</b> - Chief Engineer         | Select Mike Ricca for structures or J. McCain for all other<br><b>Note: If CO needs to go to the next level, either Jay or Mike will enter the approver</b> |
| 1-2-3-4  | <b>CA</b> - COP                    | Select Venice Grigsby   |

**Change Order Approval Notes:**

It is NOT necessary to change a CO to draft in order to edit the approver list. Instead navigate to CO Header – Fields. Only the last approver on the list can be deleted. Others are modified by moving them up or down in the list. **If the CO is changed to draft, all approvers must be re-entered.**

**To Track Change Orders:**

1. In SiteManager – Change Orders – CO Maintenance – Header – Fields
2. In SiteManager – Change Orders – CO Maintenance – Tracking
3. On Intranet – Const. Home Page - SiteManager – SiteManager Reports - #19 CO Summary Reports
4. For Funding in CICS – PMPF – Cat. 300 (Example: PMPF 417010014)



## CHANGE ORDER GENERAL NOTES

### CHANGE ORDERS – FUNDING STATUS

To check available funds, navigate as follows:

INTRANET – CONSTRUCTION HOME PAGE – SITEMANAGER – SITEMANAGER REPORTS - #19  
CO SUMMARY REPORTS

Enter the contract number and then click the bar entitled “Project Breakdown”

#### **IMPORTANT:**

For a change order to be considered in funding used, it must be at least set to pending.  
Draft CO's are not considered.

See Screen Print Below

**Change Order Summary Reports**

Please enter SiteManager contract number below.

713-22-0106

All Change Orders  
Project Breakdown  
SiteManager Reports

**Contract Number: 713-22-0106**  
Only approved and pending change orders are shown.

| Project          | Change Order | Approved      | Pending           |
|------------------|--------------|---------------|-------------------|
| 713-22-0106      | 001          |               | \$2,846.40        |
| <b>Totals:</b>   |              | <b>\$0.00</b> | <b>\$2,846.40</b> |
| Project Amount:  | \$221,760.38 |               |                   |
| Approved Amount: | \$221,760.38 |               |                   |
| Funds Available: | \$6,652.81   |               |                   |

---

| Project          | Change Order | Approved      | Pending           |
|------------------|--------------|---------------|-------------------|
| 713-22-0109      | 001          |               | \$2,846.40        |
| <b>Totals:</b>   |              | <b>\$0.00</b> | <b>\$2,846.40</b> |
| Project Amount:  | \$349,598.88 |               |                   |
| Approved Amount: | \$349,598.88 |               |                   |
| Funds Available: | \$10,487.97  |               |                   |

## Change Order General Notes

- Example FAX comments – Faxing CO to Contractor:

COMMENTS: PLEASE REVIEW, SIGN, DATE AND RETURN VIA FAX THE ATTACHED CHANGE ORDER. THE APPROVAL PROCESS FOR THIS CO WILL CONTINUE UPON RECEIPT OF YOUR FAXED SIGNATURE. THE ORIGINAL CO WILL BE MAILED TO YOU, ALSO FOR YOUR SIGNATURE. BE ADVISED THAT THE DATE OF YOUR FAXED SIGNATURE IS THE CONTRACTOR'S OFFICIAL APPROVAL DATE FOR THIS CO. THEREFORE, WHEN SIGNING THE ORIGINAL, PLEASE DATE THE ORIGINAL WITH THE DATE OF YOUR FAX SIGNATURE.

---

- Example FAX comments – Faxing CO to COP:

COMMENTS: AS PER CURRENT SITEMANAGER POLICY, PLEASE ELECTRONICALLY APPROVE THIS CO WITHIN SITEMANAGER AS SOON AS ALL REMAINING, REQUIRED ELECTRONIC APPROVALS ARE COMPLETE. ALSO AS PER CURRENT POLICY, THE SIGNED, ORIGINAL CO WILL BE FORWARDED TO CONSTRUCTION AUDIT AFTER ALL REQUIRED SIGNATURES ARE COMPLETE.

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- EXAMPLE FAX COMMENTS – FAXING CO TO DISTRICT CONSTRUCTION ENGINEER (OPTIONAL):

COMMENTS: PLEASE REVIEW THE ATTACHED CHANGE ORDER. AS PER CURRENT POLICY, PLEASE ELECTRONICALLY APPROVE OR DENY THIS CO WITHIN SITEMANAGER. ALSO AS PER CURRENT POLICY, THE ORIGINAL CO WITH THE CONTRACTOR'S SIGNATURE WILL BE FORWARDED TO THE DISTRICT UPON RECEIPT. BE ADVISED THAT THE DATE OF YOUR ELECTRONIC SIGNATURE IS THE DISTRICT CONSTRUCTION ENGINEER'S OFFICIAL APPROVAL DATE FOR THIS CO. THEREFORE, WHEN YOU SIGN THE ORIGINAL, YOU SHOULD DATE THE ORIGINAL WITH THE DATE OF YOUR ELECTRONIC SIGNATURE.

---

## Change Order General Notes

**NEW CONTRACT ITEMS ADDED BY CHANGE ORDER** When your Change Order adds a new item to your contract, select a standard item number from the Item Master List. Avoid specialty items. Use "S" items only when specifications are being altered.

- When adding a new specialty item, type the new line item number preceded by an "S-" on the first line of the supplemental description in Change Order Items. On this same first line, type the name. If needed, the name may be continued to the second line of the supplemental description.
  - Example: S-9001 Special Striping
- When adding a new standard item, type the full name of the new item in the 1<sup>st</sup> and 2<sup>nd</sup> lines of the supplemental description.
  - Example: Cast-in-Place Concrete Revetment  
(6" Thick) Paved Ditches

See screen-print examples on the following page.

### **LINE ITEM NUMBERS FOR NEW CONTRACT ITEMS ADDED BY CO**

- The first new item added to a project by Change Order will be Line Item No. 9001. . . . The second will be No. 9002, etc. If the contract has multiple projects, the line item number will be the same for all applicable projects for this newly added item number.

|  | Project No. 1 | Project No. 2 | Project No. 3 |
|--|---------------|---------------|---------------|
| 1 <sup>st</sup> New Item's Line Item No. | 9001          | 9001          | 9001          |
| 2 <sup>nd</sup> New Item's Line Item No. | 9002          | 9002          | 9002          |

- Line Item Numbers should remain the same for Item Numbers across projects within a contract.
- Example 1: Item No. 401-02 is added by CO for Project #1 and #3. The Line Item Number is 9001 for both projects. Later, Item 726-01 is added by CO for Project #2. Its Line Item Number should be 9002 (or the next available Line Item Number). Even later, it is discovered that Item No. 401-02 will be needed for Project #2. Its Line Item Number will be 9001.

| <u>Line Item# Description</u>       | <u>Project #1</u> | <u>Project #2</u> | <u>Project #3</u> |
|-------------------------------------|-------------------|-------------------|-------------------|
| Line Item for 401-02 added by CO #1 | 9001              | -                 | 9001              |
| Line Item for 726-01 added by CO #2 | -                 | 9002              | -                 |
| Line Item for 401-02 added by CO #3 | -                 | 9001              | -                 |

- Example 2: Item No. 401-02 originally exists for Project #1 and Project #3. Its Line Item No. is 0010 for both projects. Later, Item 401-02 is added by CO #001 to Project #2. Its Line Item Number is 0010.

| <u>Line Item# Description</u>                               | <u>Project #1</u> | <u>Project #2</u> | <u>Project #3</u> |
|---|-------------------|-------------------|-------------------|
| Line Item for 401-02 added by CO #1<br>(To Project #2 only) | 0010              | 0010              | 0010              |

Hint: See CONSTRUCTION HOME PAGE – SITEMANAGER REPORTS - REPORT NO. 01 - CONTRACT ITEM LIST for the next available line item number for your contract.

**LOTUS NOTES AUTOMATED CHANGE ORDER NOTIFICATION**

This optional notification is now available and is located on the Notes1 server. Its use is very similar to the progress estimate notification in Lotus Notes.

## NEW SPECIALTY ITEM

AASHTO SiteManager

File Edit Services Window Help

Change Order Items

Change Order Item New Contract Item

Contract ID: 000-40-0001 Change Order Nbr: 049

Project Nbr: 000-40-0001 Category Nbr: PART Line Item Nbr: 0915

Item Code: S-LF Units Type: Linear Feet Spec Year: 2000

Description: Linear Feet Special Item

Major Item: ☐ Specialty: ☐ Status Type: Pending

Unit Price: \$150.00000

Proposal Line Nbr: 0915 Related Item:

Critical: ☐ Pay Plan Qty:

Supplemental Descriptions:

S-0915 Special Striping

Ready Server PROD JDM id0822

For a correctly formatted CO Report, enter a new Specialty Item Description as follows: Enter "S-" plus line item number; then enter the item's name in the first line of the supplemental description

## NEW STANDARD ITEM

AASHTO SiteManager

File Edit Services Window Help

Change Order Items

Change Order Item New Contract Item

Contract ID: 000-40-0001 Change Order Nbr: 049

Project Nbr: 000-40-0001 Category Nbr: PART Line Item Nbr: 0914

Item Code: 712-01-C Units Type: Square yard Spec Year: 2000

Description: Concrete Cast-in-Place Revetment (6" Thi

Major Item: ☐ Specialty: ☐ Status Type: Pending

Unit Price: \$10.00000

Proposal Line Nbr: 0914 Related Item:

Critical: ☐ Pay Plan Qty:

Supplemental Descriptions:

Concrete Cast-in-Place Revetment (6" Thick) Paved Ditches

Ready Server PROD JDM id0822

For a correctly formatted CO Report, enter a new standard item description as follows: Enter the full, standard name plus any additional necessary identifying information.

Change Order Report - SiteManager Contracts - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites

Address http://h13001ms001/annreports/CORreport\_change.asp?projnum=000-40-0

Links SM Reports SM Docs Over-Under

Louisiana  
Department of Transportation and Development  
Change Order Report

NO. 049

Date: 04/13/2005

S.P. NO. 000-40-0001

F.A.P. NO. STP-2800(506)

Name: S. JCT. LA. 89 - JCT. U.S. 90

Primary Parish: Lafayette

LA 92

Category 4 / 1A

712-01-C Line Item 0914 = 712-01-C Concrete Cast-in-Place Revetment (6" Thick) Paved Ditches:  
Create item for 350 SQYD or 100%.

S-LF Line Item 0915 = S-LF S-0915 Special Striping:  
Create item for 375 LF or 100%.

| Item No.                                | Item  | Major Item % of Cont. | Price per Unit | Change Quantity                 | Change Amount | Current Quantity | Revised Quantity | % Change |
|---|---|-----------------------|----------------|---------------------------------|---------------|------------------|------------------|----------|
| 712-01-C                                | Concrete Cast-in-Place Revetment (6" Thick) Paved Ditches | No                    | \$10.00000     | 350.000                         | \$3,500.00    | 0.000            | 350.000          | New      |
| 000-40-0001 / 0914                      |   | 0.25%                 | SQYD           |                                 |               |                  |                  |          |
| S-LF                                    | S-0915 Special Striping                                   | No                    | \$150.00000    | 375.000                         | \$56,250.00   | 0.000            | 375.000          | New      |
| 000-40-0001 / 0915                      |   | 3.96%                 | LF             |                                 |               |                  |                  |          |
| Additional Contract Days Requested None |   |                       |                | Amount of Over Run: \$59,750.00 |               |                  |                  |          |

Requested By: \_\_\_\_\_ Date: \_\_\_\_\_

Recommended By: \_\_\_\_\_ Date: \_\_\_\_\_

Done Local intranet

|  |                                  |                 |            |
|--|----------------------------------|-----------------|------------|
| Louisiana<br>Department of Transportation and Development<br>Change Order Report |                                  | NO.             | 001        |
|  |                                  | Date:           | 03/22/2005 |
| S.P. NO.   | 822-07-0012                      | F.A.P. NO.      | STATE ONLY |
| Name:  | 1.9 MILES SOUTH - N. JCT. US 165 | Primary Parish: | Grant      |
| LA 524   |                                  | Category 1 / 1D |            |

SCOPE: This project begins at a point located 935 feet north of a connecting spur (LA 524) leading back to U.S. 165 and ends 65 feet South of U.S. 165 for a total length of 1.877 miles. This project consists of one lift Superpave Asphaltic Concrete, Pavement Patching, Aggregate Surface Course, Mailboxes, and other related work.

PURPOSE: The purpose of this change order is to adjust the plan quantities used to construct the captioned project.

This text was entered into SiteManager's  
1<sup>st</sup> General Explanation

**502-01 Line Item 0002 = 502-01 Superpave Asphaltic Concrete :**

Increase by 544.65 TON or 18.21%.

The overrun of this item was to allow for the placement of Asphaltic Concrete leveling on the roadway throughout the project. This project consisted of an on-course overlay over existing roadway. Extensive maintenance patching in previous years had resulted in the travel lanes becoming uneven. This made it necessary to place Asphaltic Concrete Leveling in these areas in order to bring lanes up even prior to overlaying with final wearing course resulting in an overrun for this item.

**502-01-A Line Item 0003 = 502-01-A Superpave Asphaltic Concrete, Paved Drives and Turnouts :**

Decrease by 51.1 TON or -28.77%.

The underrun of this item was due to the contract amount being overestimated. All drives and mailbox pads were placed in accordance with project plans and specifications resulting in an underrun in plan quantity for this item.

**509-01 Line Item 0004 = 509-01 Cold Planing Asphaltic Pavement :**

Decrease by 485 SQYD to zero or -100%.

The purpose of this item was to be used to cold plane an existing bridge and tie ends. Actual field inspection revealed the need to patch these areas. In doing so, the contractor was able to make the necessary adjustments to the roadway grade with his patching eliminating the need to cold plane this area resulting in an underrun.

**724-01-B Line Item 0007 = 724-01-B Pavement Patching (12" Minimum Thickness) :**

Decrease by 667.53 SQYD or -39.27%.

The underrun of this item was due to the original project length at the time the patching quantity figured was 2.899 miles. The project length was later shortened to 1.877 miles, but the patching quantity was not reduced to reflect the change in project length, resulting in an underrun of this item.

**735-01 Line Item 0012 = 735-01 Mailboxes :**

Decrease by 3 EACH or -37.50%.

The underrun of this item was due to the original project length at the time the quantity of mailboxes and mailbox supports were figured to be 2.899 miles. The project length was later shortened to 1.877 miles, but the quantity for this item was not reduced to reflect the change in project length, resulting in an underrun of this item.

**735-02 Line Item 0013 = 735-02 Mailbox Supports (Single) :**

Decrease by 3 EACH or -42.86%.

The underrun of this item was due to the original project length at the time the quantity of mailboxes and mailbox supports were figured to be 2.899 miles. The project length was later shortened to 1.877 miles, but the quantity for this item was not reduced to reflect the change in project length, resulting in an underrun of this item.

**502-01-LPI Line Item 0901 = 502-01-LPI Superpave Asphaltic Concrete Incentive Pay:**

Create item for 2555.44 EACH or 100%.

The addition of this item was due to the contractor being able to achieve specification requirements for payment of Superpave Asphaltic Concrete on the roadway at 101% pay and on the paved drives and turnouts at 103% pay as per pages E-88 and E-89 of the contract specifications.

This text was entered into SiteManager's Item Specific Explanations.  
Seven (7) Item Specific Explanations were used.

**TIME:**

No additional time is requested or required.

**SPECIFICATIONS**

There are no changes to the specifications due to this change order

**ATTACHMENTS**

category work sheet

502-01 pay incentive work sheet

This text was entered into SiteManager's  
2<sup>nd</sup> or last General Explanation

| Item No.                                       | Item  | Major Item | Price per Unit | Change   |             | Current Quantity | Revised Quantity | % Change |
|--|---|------------|----------------|----------|-------------|------------------|------------------|----------|
| Proj. / Line Item No.                          |   | % of Cont. |                | Quantity | Amount      |                  |                  |          |
| 502-01   | Superpave Asphaltic Concrete                            | Yes        | \$47.81000     | 544.650  | \$26,039.72 | 2991.300         | 3535.950         | 18.21%   |
| 822-07-0012 / 0002                             |   | 49.45%     | TON            |          |             |                  |                  |          |
| 502-01-A                                       | Superpave Asphaltic Concrete, Paved Drives and Turnouts | No         | \$90.56000     | -51.100  | -\$4,627.62 | 177.600          | 126.500          | -28.77%  |
| 822-07-0012 / 0003                             |   | 3.35%      | TON            |          |             |                  |                  |          |
| 509-01   | Cold Planing Asphaltic Pavement                         | No         | \$5.14000      | -485.000 | -\$2,492.90 | 485.000          | 0.000            | -100.00% |
| 822-07-0012 / 0004                             |   | 0.00%      | SQYD           |          |             |                  |                  |          |
| 724-01-B                                       | Pavement Patching (12" Minimum Thickness)               | Yes        | \$48.17000     | -667.530 | \$32,154.92 | 1700.000         | 1032.470         | -39.27%  |
| 822-07-0012 / 0007                             |   | 14.55%     | SQYD           |          |             |                  |                  |          |
| 735-01   | Mailboxes   | No         | \$12.00000     | -3.000   | -\$36.00    | 8.000            | 5.000            | -37.50%  |
| 822-07-0012 / 0012                             |   | 0.02%      | EACH           |          |             |                  |                  |          |
| 735-02   | Mailbox Supports (Single)                               | No         | \$248.00000    | -3.000   | -\$744.00   | 7.000            | 4.000            | -42.86%  |
| 822-07-0012 / 0013                             |   | 0.29%      | EACH           |          |             |                  |                  |          |
| 502-01-LPI                                     | Superpave Asphaltic Concrete Incentive Pay              | No         | \$1.00000      | 2555.440 | \$2,555.44  | 0.000            | 2555.440         | New      |
| 822-07-0012 / 0901                             |   | 0.75%      | EACH           |          |             |                  |                  |          |
| Additional Contract Days Requested <b>None</b> | Amount of <b>Under Run:</b> -\$11,460.28                |            |                |          |             |                  |                  |          |

Requested By:

\_\_\_\_\_

Date: \_\_\_\_\_

Dean, Bill

Resident Engineer

Accepted By:

DIAMOND B CONSTRUCTION CO. L.L.C.

Date: \_\_\_\_\_

Contractor

By: \_\_\_\_\_

Recommended By:

\_\_\_\_\_

District Administrator

Date: \_\_\_\_\_

DOTD Chief Const. Engineer

Approved:

\_\_\_\_\_

Chief Engineer

Date: \_\_\_\_\_

State Project No. 822-07-0012

Plan Change #001

Approved

05095115836

04/05/2005

Original Contract Cost: \$341,853.07

Total Approved Change Order to date: -\$22,920.56

% of Total Approved Cost: 6.705%

| Order | Approver            | Date       | Action  | Comments   |
|-------|---------------------|------------|---------|--|
| 1     | Dean, Bill          | 04/05/2005 | Approve |  |
| 2     | Dean, Bill          | 04/08/2005 | Approve | Bill Dean approved for contractor as per fax from Michael Hamlin 4/8/2005. |
| 3     | Mays, Robert        | 04/08/2005 | Approve |  |
| 4     | Gagnard, John P.    | 04/08/2005 | Approve |  |
| 5     | Marchand, Wm. Wayne | 04/14/2005 | Approve |  |
| 6     | Kilian, William     | 04/14/2005 | Approve |  |
| 7     | McCain, Jay         | 04/15/2005 | Approve |  |
| 8     | McCain, Jay         | 04/15/2005 | Approve |  |
| 9     | Grigsby, Venice     | 04/20/2005 | Approve |  |

This validation number is generated when the project engineer electronically approves the Change Order.





**FINAL ESTIMATE**

**FINAL AUDIT  
ESTIMATE WORKBOOK**

# ENTERING REFERENCES FOR FINAL AUDIT ESTIMATE WORKBOOK

## PROGRESS REFERENCE – FINAL REFERENCE – CALCULATIONS ATTACHED

- Prepare the day's DWR by entering data for the first 4 DWR Tabs as explained in the Guide to DWR's and Diaries located on the intranet on SiteManager's Documentation page.
- Navigate to the DWR's 5<sup>th</sup> Tab – the Work Item Tab.
  - Select the Pay Item to be referenced.
  - Enter Pay Quantity
 

Note: If a **PR**, **FR** or **CA** is needed but a pay quantity is **NOT** due, enter zero (0) in the pay quantity field.
  - Select the Contractor
  - \*Enter the pay item's reference in the Location field

Enter PR, FR or CA as the first two characters in the location field and follow them with a space. **Anything else will not achieve the desired results!**

- \*Does the reference in this location field point to the pay item's total quantity to be paid on a **progress estimate**?

YES
NO

**Enter PR (progress reference) in front of the reference. Upper and lower case are both acceptable.**

Examples:

**PR** <sup>1</sup>Field Book No. 999-999, Pg 99  
**PR** See Attached Template Report  
**PR** See Attached Excel Spreadsheet  
**PR** <sup>1</sup>See Excel Spreadsheet

Limit entries to one **PR**/Pay Item/pay period.

**PR** must calculate to the total paid in one estimate period.

**PR's are not mandatory for any item at any time.** PR's if used can be a convenience when checking quantities.

\*Does this location refer to the pay item's total **final** quantity to be paid?

YES

NO

**Enter FR (final reference) in front of the reference. Upper and lower case are both acceptable.**

Examples:

**FR** <sup>1</sup>Field Book No. 999-999, Pg 99  
**FR** See Attached Template Report  
**FR** See Attached Excel Spreadsheet  
**FR** <sup>1</sup>See Excel Spreadsheet

Limit entries to one **FR**/Pay Item.

**FR** must calculate to the final total paid.

One **FR** will be entered for each pay item. **One FR per pay item is required.**

\*Does this location refer to **sketches or calculations** submitted as proof of pay quantity?

YES

NO

**Enter CA (calculations attached) in front of the reference. Upper and lower case are both acceptable.**

Examples:

**CA** <sup>1</sup>Field Book No. 999-999, Pg 99  
**CA** See Attached Sketch w/Calculations  
**CA** See Attached Spreadsheet for Calculations  
**CA** <sup>1</sup>See Excel Spreadsheet

Other possibilities:

**FR** See Attached Spreadsheet w/**CA** Included

**FR CA** <sup>1</sup>See Excel Spreadsheet

A **CA** is required only when it replaces the "calculations folder".

**!!! Enter a "daily" reference.**

Examples:

<sup>1</sup>Field Book No. 999-999, Pg 99  
 See Attached Template  
 See Attached Excel Spreadsheet  
<sup>1</sup>See Excel Spreadsheet

**!!! "Daily" references are printed in the Workbook (P.E. Style) ONLY.**

No limitation on entries. Entries can be made at one/day/pay item/Work Item Tab location.

**CAUTION:** The Final Audit Estimate Workbook is required. In order to auto-generate this workbook, the PR, FR and CA references must be correctly used. **FR's are required.** If FR's are not used, if they should point to incorrect or incomplete quantities, or if they are used inconsistently, it is very likely that the final workbook will have to be manually produced by the P.E. Office. BE CAREFUL.

<sup>1</sup>The absence of the word "**Attached**" will indicate that the referenced documentation will be submitted with the final estimate documentation or that the documentation will be attached at a later date.

## FINAL AUDIT ESTIMATE WORKBOOK REFERENCES GENERAL NOTES

### PROGRESS REFERENCE (PR) VS FINAL REFERENCE (FR)

#### Final Reference (FR)

Construction Audit checks only those references preceded by **FR**. If the **FR** refers to a quantity different than the actual final pay quantity, Construction Audit may look at PR's (if they exist) for clarification. Otherwise, all references except **FR's** are discounted by Final Audit. **One FR per pay item is required.** It **must** refer to the correct total quantity actually paid. Please refer to the CAUTION at the bottom of the preceding page, and please be careful with **FR's**.

The **FR** requirement will continue after templates and template reports are brought online. (Example: **FR** Template Report)

#### Progress Reference (PR)

Progress References are **NOT** required at any time. The only rule: The **PR** reference, if used, must refer to the correct quantity actually paid for that particular estimate period. (It is **NOT** required that the sums of all **PR** quantities for a particular item equal that item's **FR** quantity.)

**PR's** are used strictly for the convenience of the Office Manager; and the Office Manager may opt not to use them at all. **PR's** can be a handy documentation tool. To document that the math (for an item paid on an estimate) has been checked and verified, refer to the math check preceded by the **PR** notation. (Example: **PR** attached spreadsheet. A record of the OM's verification now exists.)

Since templates do most of the math, completed template reports should eliminate the need for most **PR** references.

### REFERENCES FOR PIPE (C, P, M)

Before the inspector enters the "Daily" reference in the location field, he should add one of the following alpha characters followed by a one character blank space (spacebar) to document the type of pipe:

**C - to record concrete pipe**

**M - to record metal pipe**

**P - to record plastic pipe**

(This applies to pipe items only)

#### **NOTE:**

- **PR, FR, CA, C, M, and P** are reference notation codes. Do **NOT** use these codes together. For proper reporting, one code only can be used in any one reference location. If two codes must be used on the same DWR, select another location and use a zero PAY QTY for the estimate reference. Example: All concrete pipe (80 LF) is placed in one day – item complete.
  - Enter **80.000** in PAY QTY; enter "**C Field Book 999-999, Pg 99**" in the location reference.
  - Select "NEW" location.
  - Enter **0.000** in PAY QTY; enter "**FR Field Book 999-999, Pg 99**" in the location reference.

## FINAL ESTIMATE SUBMITTAL AND APPROVAL PROCEDURE

- Complete the “**last**” change order. (Never check **FINAL QUANTITY** as the function on the Change Order Header. Never do a “FINAL” Change Order.)
- When the last change order has been approved, generate the Final Estimate. Do not approve at the Office Manager’s level.
- **Navigate to CONTRACTOR PAYMENTS – ESTIMATES – ESTIMATE DISCREPANCY and be sure all discrepancies are resolved.**
- Review final references (FR) and verify that they point to the correct total amount paid for every pay item. When updating final references, be sure that the quantity entered is zero. From the SiteManager Reports page on the intranet use #15, the P.E. Style Estimate Workbook. The Final Audit Estimate Workbook cannot be viewed until the Final Estimate has been generated.
- All progress estimates must be approved and all monies due must have been paid. No additional money can be paid on the Final Estimate (DOTD Policy).
- Print the **draft** Final Estimate (Final Quantities Draft - #09 in SiteManager Reports on the intranet). Verify that the Grand Total Installed and the Grand Total Paid are the same.
- After all verification is complete, the Office Manager approves the Final Estimate.
- The Project Engineer approves the Final Estimate.
  - (The District Construction Engineer does not approve final estimates)
- Print the Final Estimate for the P.E.’s signature. (Summary of Final Quantities - #09 in SiteManager Reports on the intranet). **This report will not print until after the P.E. approves the Final Estimate.**
- Submit the Final Estimate with supporting documentation as per current DOTD Policy.
  - DO NOT send the Lotus Notes automated email notification. It is not received in Final Audit.
  - Construction Audit approves the final estimate after audit procedures are complete.

## FINAL ESTIMATES GENERAL NOTES

The Final Estimate cannot be approved at the first level if there are discrepancies. All discrepancies must be resolved by change order or other appropriate methods before the estimate can be approved.

A Final Estimate cannot be generated until all progress estimates are approved.

To see what estimates paid a particular item (money only); navigate to CONTRACTOR PAYMENTS – ESTIMATE – ESTIMATE ITEM PAY BOOK. For quantities per estimate, related change orders and reference notations, see the Report #09, Final Estimate Workbook (P.E. Style).

Monthly Asphalt/Fuel Adjustment Reports must be sent in with the Final Estimate documentation.

# **MISCELLANEOUS TIPS AND TRICKS**

# LADOTD SiteManager Reports

|  |       |  |
|--|-------|--|
| 01 - Contract Item List  | ----- | Need to add a pay item to your contract? Find the next available line item number here. Many other uses as well.                               |
| <b>02 - Estimate Workdays</b>  | ----- | To be used with Progress Estimates   |
| <del>03 - Line Item Adjustments</del>  | ----- | Not Available  |
| <b>04 - (A)Diary Report (B)Diary Preview</b>   | ----- | Use B Prior to authorizing the associated DWR's. Use A after authorization   |
| <b>05 - Change Order Report (Form 652)</b>   | ----- |  |
| 06 - Item Over/Underrun Report   | ----- | Excellent Report for reviewing Progress as well as Final Estimates. Recommend review before the approval of all estimates.                     |
| 07 - (A)Fuel & Asphalt Adjustment Calculator (B)Adjustment Report Viewer<br>.....(C)Monthly Fuel Price Indexes | ----- | Choose Opt A AFTER generating the Estimate. Opt B Reports are to be printed, filed and submitted with Final documentation.                     |
| 08 - Weekly Force and Progress Report  | ----- |  |
| 09 - (A)Summary of Final Quantities (B)Final Quantities Draft  | ----- | Opt A prints only after the P.E.'s approval. Opt B is your working copy.   |
| 10 - Recap. of Weather and Workdays (Form 657)   | ----- | To be used with Final Estimate   |
| <b>11 - Partial Estimate Quantities</b>  | ----- | Replaces ESTI Report 651   |
| 12 - Change Order Validation   | ----- |  |
| 13 - Change Orders Pending Approval  | ----- | Are Change Orders still pending?? Here's a quick check.  |
| <del>14 - Estimate Summary Report</del>  | ----- | Pay document for Accounting. Used by Const. Audit only.  |
| 15 - (A)Final Audit Estimate Workbook (B)(PE style)  | ----- | Opt B resembles the ESTI Workbook. To correctly use Opt A, the final estimate must have been generated.  |
| 16 - Overdue Final Estimates   | ----- | Are you on <b>THAT</b> list??? ☹️  |
| 17 - Delinquent Change Orders  | ----- | CO's with no action ≥ 28 days after P.E.'s signature   |
| 18 - Subcontracted Work Items Report   | ----- | Items of work assigned to sub-contractors  |
| 19 - Change Order Summary Report   | ----- | Tabulates and Sums all CO's per contract. Displays money, status, category and reason. It's SM's version of ESTI's #36-Plan Change Data Sheet. |
| 20 - Stockpiled Materials Report   | ----- | Advance & Incorporate Summary - Good Info  |
| 21 - Claims Disputes   | ----- | See the SiteManager Documentation Intranet Page  |
| 22 - Due/Overdue Estimates   | ----- | Monthly Progress Estimates either due or overdue. Displays all over one month from Estimate Ending Date.                                       |
| 23 - CP-1A Report  | ----- | Destined to be an Office Manager favorite. Check it out!   |
| 24 - Unauthorized DWR Days List  | ----- | All DWR's should be authorized. This is a quick way to find 'em all.   |

## Application for Requesting Site Manager User Access

Last Name: \_\_\_\_\_

First Name: \_\_\_\_\_

Mainframe User ID: \_\_\_\_\_

Dist./Sect.:\_\_\_\_\_ Gang:\_\_\_\_\_ (If there are multiple gangs sharing an office and there is one Project Engineer who is in charge of these gangs, please specify the smallest gang as being the gang assigned to.)

Title: \_\_\_\_\_

Supervisor's Mainframe User ID: \_\_\_\_\_

Employees will be setup in groups that are relevant to the employees' project related activities. Please "check off" applicable group(s).

| <b>**SiteManager Groups</b> |                    |   |
|-----------------------------|--------------------|---|
| <input type="checkbox"/>    | Inspectors         | Enters Daily Work Reports and views various reports   |
| <input type="checkbox"/>    | Project Supervisor | Enters Daily Work Reports and views Diaries & various reports. Authorizes Daily Work Reports and creates diaries. Generally limited to P.E.'s primary assistant(s).                   |
| <input type="checkbox"/>    | Office Manager     | Enters Daily Work Reports, generates Estimates and enters Change Orders. First level of approval (review only) for estimates and change orders.                                       |
| <input type="checkbox"/>    | Contractor         | The P.E. approves for this group. Limited to the Resident Engineer.   |
| <input type="checkbox"/>    | Project Engineer   | All of the above and second level of approval for estimates and first level of plan changes. Limited to the Resident Engineer and anyone who has signature authorization for the P.E. |

If you are in a HQs section, please describe in detail your area of work responsibility in relation to SiteManager: Examples: Approves estimates for pay, approves plan changes, and reviews final estimates. Routinely checks progress estimates/final estimates for compliance with current DOTD policy. Loads/activates contracts

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Is this person authorized to sign documents for the Project Engineer? \_\_\_\_\_ (Dist. use only)

Submitted by: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

P.E. Signature (req'd): \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

# Contract Authority

## ASSOCIATING INSPECTORS WITH CONTRACTS

To give a user contract authority outside of his gang you go to the Main Panel, Contract Administration, Contract Records, and Contract Authority.

Select the User; click the new icon at the top. Use the pull down arrow in the Group Description.

| Group Description  | Contract Id | Contract Description                        | Authority Start Date |
|--------------------|-------------|---|----------------------|
| PE-Inspector Group | 450-09-0022 | I-10 MISSISSIPPI RIVER BRIDGE FENDER REPAIR | 4/20/2004 13:27      |

| Group Description  | Office-wide Access                  | Contract Id | Contract Description                        | Authority Start Date | Authority End Dt |
|--------------------|-------------------------------------|-------------|---|----------------------|------------------|
| PE-Inspector Group | <input checked="" type="checkbox"/> | 450-09-0022 | I-10 MISSISSIPPI RIVER BRIDGE FENDER REPAIR | 4/20/2004 13:27      |                  |

Highlight Group Description (PE-Inspector Group) - Put the cursor over the window under Contract ID until you get a magnifying glass and search for the contract you want for the user to have access. Double click & save.

| Group Description  | Contract Id | Contract Description                        | Authority Start Date |
|--------------------|-------------|---|----------------------|
| PE-Inspector Group | 450-09-0022 | I-10 MISSISSIPPI RIVER BRIDGE FENDER REPAIR | 4/20/2004 13:27      |

| Group Description  | Office-wide Access                  | Contract Id | Contract Description                        | Authority Start Date | Authority End Dt |
|--------------------|-------------------------------------|-------------|---|----------------------|------------------|
| PE-Inspector Group | <input checked="" type="checkbox"/> | 450-09-0022 | I-10 MISSISSIPPI RIVER BRIDGE FENDER REPAIR | 4/20/2004 13:27      |                  |



## REMOTE DESKTOP FOR SITEMANAGER

Instructions for setting up Remote Desktop with XP (If you have Windows 2000 get with your Computer Tech so they can load the Remote Desktop program):

- Start
- Programs
- Accessories
- Communications
- Remote Desktop
- Arrow to "Browse"
- Select h13001ms004
- Options
- Enter your user ID and password
- Domain = LADOTDOM
- Go to local resources tab
- Click on disk drives
- Unclick printers
- Connect

Another log on screen will appear.

- Input your PC logon (not your SM logon)
- Select OK.

You are ready to use SM. This will greatly speed up the SM program.

Create a shortcut to remote desktop on your regular desktop.

You can toggle back and forth from your regular desktop to the remote desktop. Just hit the minus sign while in remote and then your other desktop will appear. Do not leave the remote desktop up for any length of time unless you are actually using it. It is very important when leaving the remote desktop to go to "Start", "Logoff".

## **“STANDALONE” GUIDE FOR OFFICE MANAGERS AND INSPECTORS**

### **DOWNLOAD**

This will allow your inspectors to use their laptops in the field and record DWR information without being connected to the server.

Setting up a standalone project on the inspector's laptop or desktop is the **Office Manager's or the Project Supervisor's responsibility:**

- Connect the laptop to the network using the blue line
- Logon to the inspector's laptop with your ID as the **OM**
- Navigate MAIN PANEL – PIPELINE – SERVER TO PM
- From the top menu, select “Open” Folder
- Select the contract ID
- From the “Pipeline Summary” tab, check “Basic Contract Data”,
- From the top menu select “Services”, “Pipeline Data”
- This will “check out” the project to that laptop
- Log out of SM
- Have the inspector or inspectors (if they will be on the same job and will share the laptop) log on to SM in the “**Server**” mode
- Have inspector(s) navigate to MAIN PANEL – DAILY WORK REPORTS –DAILY WORK REPORTS.
- The inspector then closes SM.
- Repeat the Log in to **Server** and Close out procedure for each inspector using the laptop.
- Have each inspector log in to SM in the “**Standalone**” mode
- Make sure he can access his contract before he leaves
- Remember, the information the inspectors input is now stored only on the hard drive of that laptop.
- The Inspector will pipeline the DWR's back to the server.
  - The frequency of uploads from Standalone back to the Server will be decided by the P.E. It is recommended that the inspector upload daily. If that is not possible, upload at least on Monday morning.
- Download contract information to the laptop at least once on the morning after each estimate period ends. Downloading after the approval of Change Orders is also recommended.

### **Note:**

When checkout is complete, the inspector must log in to server mode first. (Necessary only once per inspector per laptop per project) Then unplug blue cord – logon in Standalone.

## **INSPECTOR RESPONSIBILITY TO UPLOAD “CHECK IN”**

- Connect the laptop to the network using the blue line
- The Inspector will log on to “Server” mode
- Navigate Main PANEL – PIPELINE – PM TO SERVER
- From the top menu, select “Open” Folder
- Select the contract ID
- Select the “DWR” tab and add all of the DWR’s to be pipelined back to server.
- Return to first tab
- From the top menu select “Services”, “Pipeline Data”
  - All of the DWR information will be sent to the Server

### **REFRESH OR RE-LOAD THE CONTRACT:**

Periodically, the OM will need to “refresh” or re-load your contract:

- Each month after all the quantities are verified and the estimate is generated
- If changes are made to SM through the customization process
- Change Orders are approved
- Sub-contractors added, etc.

The Office Manager will remove your contract from the laptop and re-download. Because you have been working “Standalone”, your contract quantities were not being updated. After the OM “refreshes” your contract information by deleting it from your laptop and then downloading the latest information, your quantities will be current. This is the only time (just after download) that you can depend on your contract quantity information. Remember, this project may have been put on your laptop a month ago and changes probably have occurred. The quantities are updated after the estimate is generated.

When a change order is approved, Office Manager (OM) or Project Supervisor (PS) may pipeline change order information to the contract. This will allow inspectors to record work for that item without having to refresh the entire contract.

### **To DOWNLOAD CHANGE ORDER INFORMATION:**

- Connect the laptop to the network using the blue line
- Logon to the inspector’s laptop with your ID as the **OM**
- Navigate MAIN PANEL – PIPELINE – SERVER TO PM
- From the top menu, select “Open” Folder
- Select the contract ID
- Navigate the Change Order Tab – Select Change Order
- Go to Pipeline Summary Tab
- From the top menu select “Services”, “Pipeline Data”

## STANDALONE NOTES:

If Standalone is used, it is a good idea to use Standalone on every DWR for that inspector for that contract. It is faster and the quantity reported will update. It will not bring in the quantities put in on the server until the next month's estimate is generated.

**REMEMBER – If you create a DWR on the server AND in standalone for the same day/same inspector, the server DWR will OVERWRITE the standalone DWR.**

**Please do not check out any diaries or DWR'S.** If one is checked out, it has to be returned to the server in order to generate an estimate. If the laptop is lost, stolen or in the event it crashes, **the checked out diary or DWR cannot be returned to the server. Therefore, an estimate cannot be generated.**

In Standalone, **create** DWR's **only**. Always upload them to the Server. Never download them to Standalone. Never download a diary.

# IMPORTANT EMAILS



Wayne  
Weick/section40/ladotd/us  
08/26/2004 07:11 AM

belinda.bondy@latimedmgrs.com, Dewayne  
Bailey/district07/ladotd/us@ladotd,  
gary.doyle@latimedmgrs.com, Glen R  
Smith/district58/ladotd/us@ladotd, Isaac J  
Adams/district58/ladotd/us@LADOTD, James  
Kapisis/district02/ladotd/us@ladotd, Jason A  
Barefield/District04/ladotd/us@ladotd, Katherine  
Davis/section40/ladotd/us@ladotd, Kathy  
Wilson/district61/ladotd/us@ladotd,  
Mark.Stinson@FHWA.DOT.GOV, Melissa H  
Roan/district05/ladotd/us@ladotd, Misty M  
Bruno/district04/ladotd/us@ladotd, Paula J  
Monk/district08/ladotd/us@ladotd, Sandra R  
Sharp/district62/ladotd/us@ladotd, Glenn  
Chustz/section13/ladotd/us@ladotd, Judy  
Versaw/section13/ladotd/us@ladotd, Micah  
Olivier/section13/ladotd/us@LADOTD, Reggie  
Dauzat/district08/ladotd/us@ladotd, Robert  
DuPont/section40/ladotd/us@ladotd, Sarah  
Collins/section13/ladotd/us@ladotd, Wayne  
Weick/section40/ladotd/us@ladotd, Tanna  
Doucet/section40/ladotd/us@ladotd, Thomas  
Doucet/district03/ladotd/us@ladotd

cc

bcc

Subject Contractor partial estimate & time charge review

I have inserted below a excerpt from our meeting yesterday relative to SiteManager policy replacing current ESTI policy for your review. If you see anything that needs clarification, or is contradictory to what was discussed please let me know. Rather than distributing this email please give me a few days and I will forward to each of you, as well as post this information on the SiteManager web site.

The following procedure was discussed at the SMUR meeting on 08-25-04 – all decided to give it a try.

Once an "11 - Partial Estimate Quantities" report (progress estimate) has been generated, (it along with a copy of the "2 - Estimate Workdays" report" will be emailed/sent/faxed to the contractor. The contractor should review the Partial Estimate Quantities and the Time Charge information on the bottom of the report and follow the instructions. The "2 - Estimate Workdays" will be handled as per current policy.

Once a copy of the signed Partial Estimate Quantities report is returned to the project engineer's office then the project engineer can approve the partial estimate as the contractor (this is of course only if the contractor does not have access to SiteManager). This signed copy of the Partial Estimate Quantities report should be saved at the PE's office along with other project information.

If you are planning on emailing SiteManager Reports to the contractor then you should make sure that Lotus Notes is configured to send them as html formatted documents otherwise what the recipient receives may not appear the same as what you see in your report.

Page 1 of 1

08/26/04

thanks,

/s/ Wayne Weick

HeadQuarters..... 225-379-1593  
cell phone ..... 985-515-1111





Wayne  
Weick/section40/ladotd/us  
09/08/2004 08:51 PM

To belinda.bondy@latimedmgrs.com, Dewayne  
Bailey/district07/ladotd/us@ladotd,  
gary.doyle@latimedmgrs.com, Glen R

cc

bcc

Subject comments

History: This message has been forwarded.

Anytime a project engineer is approving a change order for the contractor you should enter a note in the comments area of the change order approval screen to that effect. For example, "approved for John Contractor as per signed fax on 08-03-04". Comments of other approvers can also be entered here. If you look at the bottom of a Change Order report that has been printed after several levels have already reviewed/approved it you will see that information. If you have any other thoughts regarding the use of these comment fields please let me know.

I have included a copy of example CO Report - please notice the list at the very bottom of the form.

PS - This list will not appear on the copy you send to the contractor for his signature as long as you print it prior to doing any approvals, but after changing it to pending status.



Change Order Report - SiteManager Contracts.htm

thanks,

/s/ Wayne Weick

HeadQuarters..... 225-379-1593  
cell phone ..... 985-515-1111



12/22/2004

Chadwick/district04/ladotd/us@LADOTD, Terry E  
Oswald/district08/ladotd/us@LADOTD, Terry L  
Bartley/District08/ladotd/us@ladotd, Terry S  
Maxwell/district58/ladotd/us@ladotd, Tex P  
Granger/district03/ladotd/us@ladotd, Theresa  
Green/district07/ladotd/us@ladotd, Thomas  
Doucet/district03/ladotd/us@ladotd, Thomas J  
Brian/district61/ladotd/us@LADOTD, Thomas R  
Newsom/District61/ladotd/us@ladotd, Tim J  
Lobell/district62/ladotd/us@ladotd, Timothy B  
Hassenboehler/district02/ladotd/us@LADOTD, Todd  
Landry/district07/ladotd/us@ladotd, Tom  
Landry/district61/ladotd/us@ladotd, Tommy L.  
Hickman/district62/ladotd/us@ladotd, Tony  
Hylton/district07/ladotd/us@ladotd, Tracey D  
Wingard/district02/ladotd/us@LADOTD, Tracy W  
Hilbun/district58/ladotd/us@LADOTD, Travis J  
Lovell/district02/ladotd/us@LADOTD, Treviall P  
Daniels/district62/ladotd/us@ladotd, Troy D  
Roussell/district08/ladotd/us@ladotd, Valerie  
Rutherford/District03/ladotd/us@ladotd, Vernell E  
McKenzie/district61/ladotd/us@LADOTD, Vernon H  
Rome/district62/ladotd/us@LADOTD, Venice S  
Grigsby/section40/ladotd/us@ladotd, Vicki  
Ponthieux/district07/ladotd/us@ladotd, Wade A  
Duplechin/district03/ladotd/us@ladotd, Walter L  
Purvis/district58/ladotd/us@ladotd, Walter  
Perdue/district02/ladotd/us@ladotd, Walter R  
Romain/district02/ladotd/us@LADOTD, Warren D  
Bordelon/district08/ladotd/us@ladotd, Wayne  
Marchand/district08/ladotd/us@ladotd, Wayne  
Vollman/district08/ladotd/us@ladotd, Will  
Murray/district62/ladotd/us@LADOTD, William  
Dean/district08/ladotd/us@ladotd,  
William.Farr@FHWA.DOT.GOV, William  
Kilian/section40/ladotd/us@ladotd, Wilton J  
Callais/district02/ladotd/us@LADOTD

cc

bcc

Subject new CO instruction

Effective immediately, when ever adding a new item to your contract by Change Order please use the "Supplemental Description Fields 1 & 2" as follows:

enter a "S-xxxx this is my item description" where xxxx is the line item number you assign to the item when you add it to your contract.

For example, if I were to add an item to a contract for "Police Cars" it would look something like the following if this item was designated as line item number 9981 when it was added to the contract. Then in the Supplemental Description field you would enter:

S-9981 Police Cars

if the description is longer than the first field then continue it in the second description field.

thanks,

/s/ Wayne Weick

HeadQuarters..... 225-379-1593  
cell phone ..... 225-715-5177



Rick  
Holm/section53/ladotd/us  
01/12/2005 02:29 PM

To Wayne Weick/section40/ladotd/us@ladotd  
cc Bill Temple@ladotd  
bcc  
Subject Re: Interim Police Changes for Progress Estimates and Change Orders

History: This message has been forwarded.

Approved. These policy changes are for immediate implementation. Actual changes to written policies & procedures will lag behind.  
Wayne Weick/section40/ladotd/us



Wayne  
Weick/section40/ladotd/us  
01/10/2005 11:34 AM

To Rick Holm/section53/ladotd/us  
cc  
Subject Interim Police Changes for Progress Estimates and Change Orders

This will confirm our previous conversations with regards to the following:

On SiteManager only projects it will not be necessary to send a original, project engineer signed, copy of the progress estimate to Construction Audit.

On SiteManager generated change orders approval at the COP level will be made once the electronic approval cycle is complete if the a fax copy with the contractors signature has been received by Construction Audit. This will apply to all Change Orders, Cat I - IV.

thanks,

/s/ Wayne Weick

HeadQuarters..... 225-379-1593  
cell phone ..... 225-715-5177

----- Forwarded by Katherine Davis/section40/ladotd/us on 01/13/2005 06:34 AM -----



Wayne  
Weick/section40/ladotd/us  
01/13/2005 06:02 AM

To Katherine Davis/section40/ladotd/us@ladotd  
cc  
Subject Fw: Interim Police Changes for Progress Estimates and  
Change Orders

thanks,

/s/ Wayne Weick

HeadQuarters..... 225-379-1593  
cell phone ..... 225-715-5177

----- Forwarded by Wayne Weick/section40/ladotd/us on 01/13/2005 06:00 AM -----

Rick  
Holm/section53/ladotd/us  
01/12/2005 02:29 PM

To Wayne Weick/section40/ladotd/us@ladotd  
cc Bill Temple@ladotd  
Subject Re: Interim Police Changes for Progress Estimates and  
Change Orders

Approved. These policy changes are for immediate implementation. Actual changes to written policies &  
procedures will lag behind.  
Wayne Weick/section40/ladotd/us



Wayne  
Weick/section40/ladotd/us  
01/10/2005 11:34 AM

To Rick Holm/section53/ladotd/us  
cc  
Subject Interim Police Changes for Progress Estimates and Change  
Orders

This will confirm our previous conversations with regards to the following:

On SiteManager only projects it will not be necessary to send a original, project engineer signed, copy of  
the progress estimate to Construction Audit.

On SiteManager generated change orders approval at the COP level will be made once the electronic  
approval cycle is complete if the a fax copy with the contractors signature has been received by  
Construction Audit. This will apply to all Change Orders, Cat I - IV.

thanks,

/s/ Wayne Weick

HeadQuarters..... 225-379-1593





Ziecker/district08/ladotd/us@ladotd  
Venice S Grigsby/section40/ladotd/us@ladotd, KELLY V  
cc FOLSE/section40/ladotd/us@ladotd, Alan W  
Rusch/section40/ladotd/us@ladotd  
Subject Fw: signing paper copies of Change Orders

Before signing the original SiteManager Change Order go into SiteManager, Main Panel, Change Order, Change Order Maintenance, Tracking.  
Open the folder at the top, find your contract and then select the Change Order. The approval dates are in the middle.

kd

— Forwarded by Katherine Davis/section40/ladotd/us on 01/26/2005 02:24 PM —



Wayne  
Weick/section40/ladotd/us

01/26/2005 01:01 PM

To Katherine Davis/section40/ladotd/us@ladotd

cc

Subject signing paper copies of Change Orders

As per our recent discussion please inform the appropriate SiteManager users that when signing the original paper copies of Change Orders they should use the date that the electronic approval was done.  
This should be adhered to by all levels of approvers.

thanks,

/s/ Wayne Weick

HeadQuarters..... 225-379-1593

cell phone ..... 225-715-5177



Wayne  
Weick/section40/ladotd/us  
02/25/2005 06:32 AM

To Dewayne Bailey/district07/ladotd/us@ladotd, Glen R  
Smith/district58/ladotd/us@ladotd, Isaac J  
Adams/district58/ladotd/us@LADOTD, James  
Kapisis/district02/ladotd/us@ladotd, Jason A  
Barefield/District04/ladotd/us@ladotd, Katherine  
Davis/section40/ladotd/us@ladotd, Kathy  
Wilson/district61/ladotd/us@ladotd, Melissa H  
Roan/district05/ladotd/us@ladotd, Paula J  
Monk/district08/ladotd/us@ladotd, Saundra R  
Sharp/district62/ladotd/us@ladotd, Thomas  
Doucet/district03/ladotd/us@ladotd, Robert  
DuPont/section40/ladotd/us@ladotd

cc Rick Holm/section53/ladotd/us

bcc

Subject clarification!

Hi ALL,

During a recent conversation with Rick he asked me to change something that I mistakenly thought he or Jay had previously instructed me to implement. Whatever!!

Concerning SiteManager Estimates:  
(this is only for contractors without access to SiteManager)

Rick said that we should fax the Contractors' SiteManager estimate to them. If they fax a signed copy back go ahead and immediately approve the estimate in SiteManager for the contractor. If you haven't received a faxed 'signed copy' of the estimate on day 5 then go ahead and approve the estimate for the contractor anyway. Sorry if this may be different from previous instructions for SiteManager - that the latest from Rick since I talked with him Wednesday. If any thing concerning this changes, I'll let you know.

Handling of the Weather & Workdays reports as per Rick's previous instructions still apply. (I have attached a copy of those for your reference)

----- Forwarded by Rick Holm/section53/ladotd/us on 08/05/2004 01:56 PM -----

Rick  
Holm/section53/ladotd/us  
03/04/2004 12:56 PM

To District Construction Engineers, District Project Engineers  
Alden Allen@ladotd, Luanna Cambas, William  
cc Kilian@ladotd, Barry Lacy@ladotd, Jay McCain@ladotd,  
Mike Ricca@ladotd, Wayne Weick@ladotd  
Subject Disqualification Notes

*The purpose of this e-mail is to review current procedures for disqualifying contractors and is specific to working day projects. This approved progress schedule reflects the controlling item of work scheduled to be in progress at any time during the life of the contract and is the basis for charging contract time. At the end of the estimate period, the project engineer is required to process the estimate within 5 calendar days after the estimate ending date. A key component of this estimate is the E-14, Weather and Working Day Report. Effective immediately, the E-14 will no longer be mailed, but faxed to the contractor for signature with a letter advising him*



*that he has fourteen calendar days in which to either sign and return the faxed copy or file a written protest setting forth his objections. A sample letter for your use should soon be added to the Construction Homepage. The Contractor shall also be notified that if no protest is filed during this period, or if he fails to respond, time charges shall stand as submitted. If a protest is filed by the contractor, the Department will conduct such reviews and investigations as required to rule on the protest within 30 calendar days from the date the statement is furnished the contractor.*

Please make the Office Managers in your district aware of this clarification.

thanks,

thanks,

/s/ Wayne Weick

---

HeadQuarters..... 225-379-1593  
cell phone ..... 225-715-5177



Alan W  
Rusch/section40/ladotd/us  
Sent by: Katherine Davis

03/22/2005 01:49 PM

To: Amber N Hall/District04/ladotd/us@ladotd, Arlene T  
Abraham/district03/ladotd/us@ladotd, Barbara  
Clement/district07/ladotd/us@ladotd, Brenda  
Spriggs/District03/ladotd/us@ladotd, Candace  
Gordon/district62/ladotd/us@ladotd, Carole A  
Perkins/District02/ladotd/us@ladotd, Cathy P  
Fusillier/district61/ladotd/us@ladotd, Chad H  
Parks/district58/ladotd/us@LADOTD, Christine L  
Bourgeois/district03/ladotd/us@LADOTD, Connie  
Bentivegna/district62/ladotd/us@ladotd, Cornel z  
Manuel/district02/ladotd/us@LADOTD, David W  
Matlock/district08/ladotd/us@LADOTD, Debbie  
Gilbert/district61/ladotd/us@ladotd, Doug R  
Romero/district03/ladotd/us@LADOTD, Faye S  
Kimball/district08/ladotd/us@ladotd, Gail R  
Callihan/District62/ladotd/us@ladotd, Galatea M  
Williams/district02/ladotd/us@LADOTD, Georgette A  
Durand/district03/ladotd/us@ladotd, Gisele D  
Landry/district02/ladotd/us@LADOTD, Gwen G  
Green/district08/ladotd/us@ladotd, Herbert J  
Connors/district02/ladotd/us@LADOTD, Isaac J  
Adams/district58/ladotd/us@LADOTD, Janis A  
Arrant/District07/ladotd/us@ladotd, Joanne W  
Johnson/district62/ladotd/us@ladotd, John W  
Evans/District58/ladotd/us@ladotd, Jonathan D  
Karisny/district08/ladotd/us@ladotd, Joy A  
Risbourg/district02/ladotd/us@LADOTD, Kaleen H  
Hoover/district61/ladotd/us@LADOTD, Kathy  
Wilson/district61/ladotd/us@ladotd, Kenny J  
Harlow/district05/ladotd/us@ladotd, LaQuette  
OBannon/district04/ladotd/us@LADOTD, Larry E  
Brossette/district08/ladotd/us@ladotd, Linda R  
Titus/district03/ladotd/us@ladotd, Lisa  
Jeter/district04/ladotd/us@LADOTD, Lloyd L  
Ellis/district58/ladotd/us@ladotd, Lloyd  
Rogan/district05/ladotd/us@ladotd, Lyle J  
Taylor/district03/ladotd/us@ladotd, Mary E  
Williams/District04/ladotd/us@ladotd, Melissa H  
Roan/district05/ladotd/us@ladotd, Misty J  
Wadkins/district05/ladotd/us@LADOTD, Paige  
Tharp/district05/ladotd/us@ladotd, Patrick W  
Laborde/District08/ladotd/us@ladotd, Patty  
Schmolke/district62/ladotd/us@ladotd, Paul H  
Oliver/district02/ladotd/us@LADOTD, Paul M  
Nelson/district02/ladotd/us@LADOTD, Paula J  
Monk/district08/ladotd/us@ladotd, Robert J  
Brown/district61/ladotd/us@LADOTD, Rose  
Hylton/district07/ladotd/us, Rusty L  
Hutto/district05/ladotd/us@LADOTD, Sandra R  
Sharp/district62/ladotd/us@ladotd, Sharon L  
Soileau/district03/ladotd/us@ladotd, Tena  
Chadwick/district04/ladotd/us@LADOTD, Theresa  
Green/district07/ladotd/us@ladotd, Torri D  
Thompson/District04/ladotd/us@ladotd, Tracey D  
Wingard/district02/ladotd/us@LADOTD, Warren D  
Bordelon/district08/ladotd/us@ladotd, Wilton J  
Callais/district02/ladotd/us@LADOTD  
cc: Alan W Rusch/section40/ladotd/us@ladotd, Steve  
Timmins/section40/ladotd/us@ladotd, KELLY V  
FOLSE/section40/ladotd/us@ladotd

bcc

Subject: Stockpile closure - in SiteManager

If you ever have to do a stockpile closure on an estimate, please indicate why on the Lotus Notes thread (example - contractor filed to supply paid invoices). That way we'll know it was intentional.

kd





Katherine  
Davis/section40/ladotd/us  
05/04/2005 09:35 AM

To Amber N Hall/District04/ladotd/us@ladotd, Arlene T  
Abraham/district03/ladotd/us@ladotd, Barbara  
Clement/district07/ladotd/us@ladotd, Brenda

cc

bcc

Subject Police Services

There are now 9 items set up in SiteManager to chose from to pay for police services.

Presently a **Change Order will be needed.**

The extension A, B or C can be used with each. A=Presence B=Enforcement C=Traffic  
Control

|        |                |             |      |
|--------|----------------|-------------|------|
| 107-01 | Police Vehicle | per day     | \$25 |
| 107-02 | Police Officer | 1st 2 hours | \$60 |
| 107-03 | Police Officer | per hour    | \$25 |

Examples:

|             |                                   |          |      |          |
|-------------|-----------------------------------|----------|------|----------|
| 107-01-A    | Police Vehicle                    | Per Day  | \$25 |          |
| 107-01-B    | Police Officer (1st 2 hours)      | 1st 2    | \$60 | Presence |
| Enforcement |                                   |          |      |          |
| 107-01-C    | Police Officer (additional hours) | per hour | \$25 |          |
| Control     |                                   |          |      | Traffic  |

**AS of 6-30-05 there will be only one pay item relative to Police to be used on our projects –**

**107-01 Work Zone Police Officers**

- unit of measure EACH
- unit price \$ 1.00
- Quantity of course will be the dollar value of the invoices received from the police agency billing the contractor. Remember, no mark-up by the contractor is allow on this item.

**W**





# SPREADSHEET EXAMPLES

PROJECT NO. 417-01-0014 UNIT PRICE -\$1.00

ITEM NO. 502-01-PA

MATERIAL SUPERPAVE ASPHALTIC CONCRETE PAY PENALTY

| DATE           | LOT NO. | TICKET NUMBER FROM | TICKET NUMBER TO | MIX USE | QUANTITY | ITEM NUMBER | CONTRACT PRICE | PERCENT PAY | 502-01-PA QUANTITY | ESTI PAID        | REMARKS                               | INSP |
|----------------|---------|--------------------|------------------|---------|----------|-------------|----------------|-------------|--------------------|------------------|---------------------------------------|------|
| 4/12/2004      | 357     | 1                  | 16               | 09      | 1204.72  | 502-01-B    | 43.00          | 95.0%       | 2590.15            |                  | Failing Density. Tonnage Pd 21st ESTI | DP   |
|                |         | 21                 | 55               |         |          |             |                |             |                    |                  |                                       |      |
| 5/12/2004      | 358     | 1                  | 28               | 01      | 1300.67  | 502-01-B-01 | 43.50          | 95.0%       | 2828.96            |                  | Failing Density. Tonnage Pd 22nd ESTI | DP   |
|                |         | 36                 | 60               |         |          |             |                |             |                    |                  |                                       |      |
| 5/12/2004      | 366     | 1                  | 28               | 04      | 668.89   | 502-01-D    | 65.00          | 80.0%       | 8695.57            |                  | Density. BR STR# 1                    | DP   |
|                |         |                    |                  |         |          |             |                |             |                    |                  |                                       |      |
| CONTRACT TOTAL |         |                    |                  |         |          |             |                |             | 14114.68           | 23 <sup>RD</sup> |                                       |      |

UNIT PRICE **\$1.00**

| MATERIAL | SUPERPAVE ASPHALTIC CONCRETE LOT PAY INCENTIVE |
|----------|--|
|----------|--|

| DATE RANGE            | LOT NO. | TICKET NUMBER |             | MIX USE | QUANTITY | ITEM NUMBER | CONTRACT PRICE | PERCENT PAY    | 502-01-LPI QUANTITY | ESTI PAID       | REMARKS             | INSP |
|-----------------------|---------|---------------|-------------|---------|----------|-------------|----------------|----------------|---------------------|-----------------|---------------------|------|
|                       |         | FROM          | TO          |         |          |             |                |                |                     |                 |                     |      |
| 3/14/2005 - 3/31/2005 | 316     | See Below     | Ticket List | 01      | 7586.50  | 502-01      | 52.00          | 103.0%         | \$11,834.94         |                 | Tonnage Pd 1st ESTI | PJM  |
|                       |         |               |             |         |          |             |                |                |                     |                 |                     |      |
|                       |         |               |             |         |          |             |                |                |                     |                 |                     |      |
|                       |         |               |             |         |          |             |                |                |                     |                 |                     |      |
|                       |         |               |             |         |          |             |                |                |                     |                 |                     |      |
|                       |         |               |             |         |          |             |                | CONTRACT TOTAL | 11834.94            | 2 <sup>ND</sup> |                     |      |

STATE PROJECT 135-01-0016

## WEARING COURSE TONNAGE

| SUB-LOT<br>NUMBER | DATE RANGE |           | TICKET NUMBER |    | TONS PAID | MIX USE 03 | 502-01-A Sm | 502-01Pay |
|-------------------|------------|-----------|---------------|----|-----------|------------|-------------|-----------|
|                   | FROM       | TO        | FROM          | TO |           |            | Qty Rule MU | Incentive |
|                   |            |           |               |    |           |            | 06          | MU 01     |
| 316A              | 3/14/2005  | 3/17/2005 | 1             | 64 | 1753.42   | 6.06       |             | 1747.36   |
| 316B              | 3/17/2005  | 3/23/2005 | 1             | 73 | 1975.04   | 160.8      |             | 1814.24   |
| 316C              | 3/23/2005  | 3/28/2005 | 1             | 74 | 2009.15   | 60.69      |             | 1948.46   |
| 316D              | 3/28/2005  | 4/8/2005  | 1             | 82 | 2437.69   | 148.32     | 212.93      | 2076.44   |
|                   |            |           |               |    |           |            | 212.93      | 7586.50   |

UNIT PRICE **\$1.00**

| MATERIAL | SUPERPAVE ASPHALTIC CONCRETE SURFACE TOLERANCE PAY INCENTIVE |
|----------|--|
|----------|--|

| DATE RANGE            | LOT NO. | TICKET NUMBER |             | MIX USE | QUANTITY | ITEM NUMBER | CONTRACT PRICE | PERCENT PAY    | 502-01-SPI QUANTITY | ESTI PAID       | REMARKS             | INSP |
|-----------------------|---------|---------------|-------------|---------|----------|-------------|----------------|----------------|---------------------|-----------------|---------------------|------|
|                       |         | FROM          | TO          |         |          |             |                |                |                     |                 |                     |      |
| 3/14/2005 - 3/31/2005 | 316     | See Below     | Ticket List | 01      | 7586.50  | 502-01      | 52.00          | 5.00%          | \$19,724.90         |                 | Tonnage Pd 1st ESTI | PJM  |
|                       |         |               |             |         |          |             |                |                |                     |                 |                     |      |
|                       |         |               |             |         |          |             |                |                |                     |                 |                     |      |
|                       |         |               |             |         |          |             |                |                |                     |                 |                     |      |
|                       |         |               |             |         |          |             |                |                |                     |                 |                     |      |
|                       |         |               |             |         |          |             |                | CONTRACT TOTAL | 19724.90            | 2 <sup>ND</sup> |                     |      |

STATE PROJECT 135-01-0016

## WEARING COURSE TONNAGE

| SUB-LOT<br>NUMBER | DATE RANGE |           | TICKET NUMBER |    | TONS PAID | MIX USE 03 | 502-01-A Sm<br>Qty Rule MU<br>06 | 502-01<br>Incentive<br>Pay MU 01 |
|-------------------|------------|-----------|---------------|----|-----------|------------|----------------------------------|----------------------------------|
|                   | FROM       | TO        | FROM          | TO |           |            |                                  |                                  |
| 316A              | 3/14/2005  | 3/17/2005 | 1             | 64 | 1753.42   | 6.06       |                                  | 1747.36                          |
| 316B              | 3/17/2005  | 3/23/2005 | 1             | 73 | 1975.04   | 160.8      |                                  | 1814.24                          |
| 316C              | 3/23/2005  | 3/28/2005 | 1             | 74 | 2009.15   | 60.69      |                                  | 1948.46                          |
| 316D              | 3/28/2005  | 4/8/2005  | 1             | 82 | 2437.69   | 148.32     | 212.93                           | 2076.44                          |
|                   |            |           |               |    |           |            | 212.93                           | 7586.50                          |

**ITEM 724-01-B**

**FIELD BOOK NO. 188-844, PAGE 40**

**PLAN DEPTH (P) 12 INCHES**

**CONTRACT PRICE \$50.00**

**PRICE PER INCH \$2.08**

| DATE      | STATION       | STATION  | SIDE C/L | LIN FEET | WIDTH | SQUARE YDS<br>(L x W)/9 | ACCUM DAILY<br>S.Y. | TOTAL<br>DEPTH | OVER/UNDER<br>DEPTH (TD - P) | SQ YDS/INCH:<br>(SY * D) |
|-----------|---------------|----------|----------|----------|-------|-------------------------|---------------------|----------------|------------------------------|--------------------------|
|           |               |          |          | L        | W     | SY                      |                     | TD             | D                            |                          |
| 3/11/2003 | 10+06.00      | 10+36.00 | RT       | 30.0     | 3.5   | 11.666                  | 155.109             | 12.0           | 0.0                          | 0.000                    |
| 3/11/2003 | 15+21.00      | 15+36.00 | RT       | 15.0     | 3.5   | 5.833                   |                     | 12.0           | 0.0                          | 0.000                    |
| 3/11/2003 | 20+29.00      | 20+45.00 | LT       | 16.0     | 3.5   | 6.222                   |                     | 12.0           | 0.0                          | 0.000                    |
| 3/11/2003 | 26+42.00      | 27+37.00 | RT       | 95.0     | 3.5   | 36.944                  |                     | 14.0           | 2.0                          | 73.888                   |
| 3/11/2003 | 31+91.00      | 33+15.00 | RT       | 124.0    | 4.0   | 55.111                  |                     | 16.0           | 4.0                          | 220.444                  |
| 3/11/2003 | 44+18.00      | 44+77.00 | LT       | 59.0     | 6.0   | 39.333                  |                     | 12.0           | 0.0                          | 0.000                    |
| 3/11/2003 |               |          |          |          |       |                         |                     |                |                              |                          |
| 3/12/2003 | 44+78.00      | 45+33.50 | LT       | 55.5     | 6.0   | 37.000                  | 80.332              | 10.0           | -2.0                         | -74.000                  |
| 3/12/2003 | 48+21.00      | 48+45.00 | LT       | 24.0     | 10.0  | 26.666                  |                     | 12.0           | 0.0                          | 0.000                    |
| 3/12/2003 | 49+12.00      | 49+27.00 | LT       | 15.0     | 10.0  | 16.666                  |                     | 12.0           | 0.0                          | 0.000                    |
| 3/12/2003 |               |          |          |          |       |                         |                     |                |                              |                          |
|           | TOTAL PAGE 40 |          |          |          |       |                         |                     | 235.4          |                              |                          |

**TOTAL SQUARE YARDS 235.400**

**ITEM 724-01-B**

**TOTAL SQ YD INS 294.3**

**ITEM 724-01-B-OD**

|            |        |
|------------|--------|
| UNIT PRICE | \$1.00 |
|------------|--------|

**TOTAL SQ YD INS 74.0**

**ITEM 724-01-B-UD**

|            |          |
|------------|----------|
| UNIT PRICE | (\$1.00) |
|------------|----------|



# MY NOTES

## This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced horizontal black lines across its entire width, providing a template for handwriting practice or general note-taking. The margins are consistent on all sides.



## This image shows a full page of blank white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for writing or drawing. There are no margins, text, or other markings present.

[illegible]

# Site Manager

*PROJECT ENGINEER MANUAL*



# **Project Engineer SiteManager Review**

## **General Overview of SiteManager.**

### **Differences between ESTI and SiteManager**

In ESTI quantities to be paid were entered after the close of the estimate period. They were tabulated from field books or other construction records.

In SiteManager work is recorded daily - tabulated from field books, spreadsheets or other construction records (eventually from SiteManager contained DWR ITEM TEMPLATES).

### **Why are DWRs so important?**

DWRs are where pay quantities originate. If properly kept up on a daily basis no further computations are needed at estimate time.

### **What about system speed & availability?**

SiteManager is available 24/7 except when the system backup runs just before midnight each night.

All districts offices should now have high speed network connectivity as should most of the PE offices. If you are consistently experiencing slow network speed or outages then contact the Computer Center Help Desk.

### **How does the project information get loaded into SiteManager?**

When 'Construction Audit' receives a copy of the signed contract then a load program will be run that loads the contract and project specific into SiteManager. Once the load information has been checked the contract will be activated. You can now enter information into SiteManager for your project. APPROVED subcontracts are loaded daily from the mainframe SUBS program. If a subcontractor has not been approved they will not appear in SiteManager - thus you will not be able to record work done by an un-approved subcontractor !

## What are my duties as related to SiteManager?

- 1- Record pre-construction meeting information in SiteManager.
- 2- Make sure that Construction Audit gets a copy of the 'Notice to Proceed'.
- 3- Assure that field personnel are doing the appropriate DWRs and that those DWRs represent actual work & quantities done for that day.
- 4- On a daily basis create DIARYs which authorize the work shown on the inspectors DRWs for payment and either charge a contract day or a no charge day. You may also make any pertinent remarks in the appropriate areas of the DIARY.
- 5- Update change order information relating to plan discrepancies. (instructions attached)
- 6- Document any "issues" which may arise on the project. An issue, even those that may seem insignificant, if not resolved by the project engineer or a change order could escalate into a claim. The project engineer should document the first instance of the issue into SiteManager. (instructions attached)
- 7- Prior to approving progress estimates the project engineer should assure himself that all items are being paid as per our current policy and specifications. This include overruns, pay penalties, fuel & asphalt adjustments, necessary backup documentation, etc. Pay particular attention to the progress estimate report. If there are "\*" adjacent to the item quantities then they are suspect for non-compliance with our current policies concerning payment of overruns. "+" indicates that an item was eligible for either a fuel or asphalt adjustment.
- 8- Keep the "Expected Completion Date" current! Instructions can be found on the SiteManager Documentation web-page.
- 9- Approve Change Orders and Estimates as necessary. Procedures for those procedures and many others are documented on the SiteManager WEB page. When approving a change order pay special attention to the check boxes labeled under "Change Order Purpose" - "Final Quantity" or "Force Account." Neither of these should ever be checked. Also check that the "Override Approval Rules" box is checked. Once the change order has been changed to 'pending' status you can click on the FIELDS button and check the validation number - this number should be the same as the one on the printed signed change order. Have all appropriate attachments been attached to change order - can you open and view

them? Complete, step by step instructions can be found on the SiteManager web page.

## **Recommended record keeping**

Spreadsheets filled out on a daily basis by the inspector/primary inspector and attached to the DWR on the last day of the estimate period. The daily item quantity values on the spreadsheet should be entered into SiteManager on a daily basis. The monthly quantities shown on these spreadsheets should match those on the progress estimate. The current month's spreadsheet would contain all data, even that from the previous month. During the month while the spreadsheet is being updated a procedure should be implemented to make routine backups of that data.

### **Who checks what?**

The PE should do a preliminary check of the inspectors' DWR when he authorizes it. You should be able to ascertain if the quantities are ball park. If they are questionable, then the DWR should be further scrutinized.

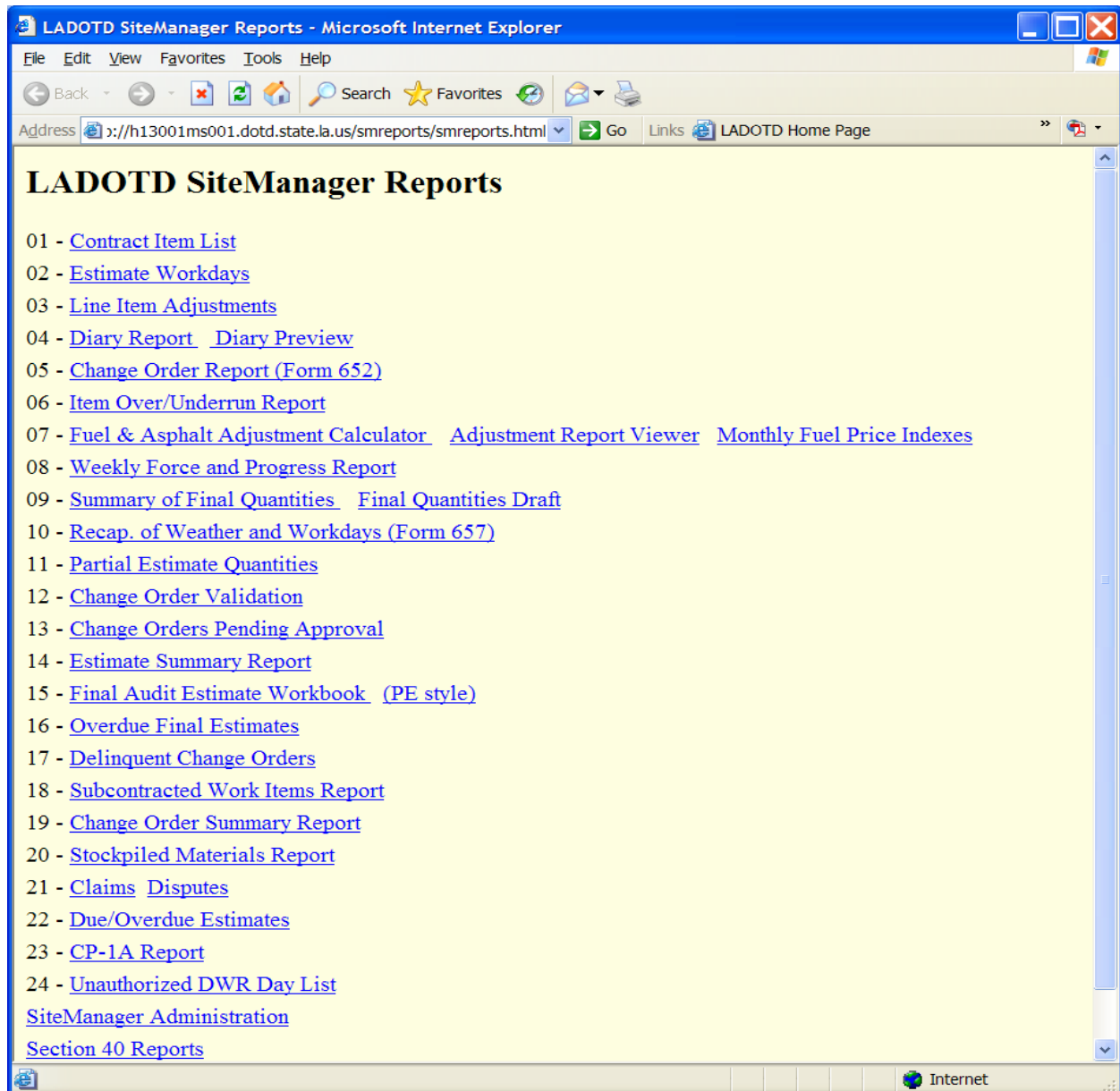
### **How do I do that?**

Compare the installed quantities shown in Sitemanager to field books or spreadsheets used to record placed quantities. Run the installed quantities report in SiteManager and compare daily quantities to those shown in field records.

What REPORTS are available to me?

The following is the link to our SiteManager Report page where you will find most of the reports that we use.

<http://h13001ms001.dotd.state.la.us/smreports/smreports.html>



Each of these reports was created with a specific purpose – please feel free to look at each – they may be just exactly what you are looking for! NEW REPORTS ARE BEING ADDED AS NECESSARY – check back frequently!

Certain report sub menus are not available to all users.