INDIANA DEPARTMENT OF TRANSPORTATION
Driving Indiana's Economic Growth

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Mitchell E. Daniels, Jr., Governor
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November 30, 2012

CONSTRUCTION MEMORANDUM
12-12

TO: District Deputy Commissioners
District Construction Directors
District Testing Engineers
District Area Engineers
District LPA Coordinators
Field Engineers
Technical Service Directors
Project Engineers/Supervisors
Office of Materials Management

FROM: Mark A. Miller, Director
Division of Construction Management and District Support

SUBJECT: SiteManager Version 3.13a Enhancements

On November 29, 2012 INDOT upgraded the SiteManager software to version 3.13 and implemented enhancements requested by INDOT personnel. These changes to SiteManager and its reports will improve the efficiency of many processes and assist in Contract completion. The following changes took place:

Change Orders – The Change Order page now utilizes tabs much like Daily Work Reports and Material Samples sections to display the Header, Items, Time Extension, and Explanation on separate tabs. Along with the entirely new structure, "Draft" and "Pending" statuses will be available on the Change Order Header tab at all times. Finally, the Change Order section will pop up a message if any special characters have been used in explanations or supplemental descriptions. These special characters prevent the creation of PDF reports. A step-by-step manual can be found at: https://netservices.indot.in.gov/sitemanager/ to aid those entering and reviewing Change Orders under the new format. The Technical Services team will also be available to help employees with any problems utilizing the new tabs. See the contact information below.

Acpt Method Field on Material Samples will not Default to "Spaces" – Previously, when a Material Sample was unauthorized, the **Acpt Method** field defaulted to the "Spaces" value. This is no longer the case.

IC-642 Reference Feature and Report – The IC-642 Reference section in SiteManager now links to the IC-642 PLN report and automatically includes the remarks entered in SiteManager in a "Reference to Source Doc" column. This means employees preparing to close a contract can type the reference in

the lines of the IC-642 Reference section, and will no longer need to hand write this information on the IC-642 PLN. The IC-642 Reference Feature can be found by navigating to Contract Administration, then Contract Records, and finally to Contracts.

Failed Contract Samples Report - This report previously listed each sample with a "Fail" status that was linked to another sample. After the upgrade, the report now lists all samples with a "Fail" status and has a column for the sample it is linked to. If the sample is not linked, the column will remain blank, which indicates to the Testing staff and Project Engineer/Supervisor that action is needed.

Progressive Record Activity Report PLN with Locations - The Progressive PLN report has moved the Unit and Unit Price to the top of the report, and each line now includes the description of the location for each DWR Date.

DWR Template for QC/QA PCCP - For those who have used the existing DWR Template for QC/QA-HMA to track lots and sublots, this new template will be very similar and afford the user the same conveniences for tracking PCCP.

DWR Adjustment Feature – This feature has been developed to meet the needs of Project Engineers and Supervisors throughout the state who wish to edit Daily Work Reports (DWR) of their staff without making them return from the field. This function creates an Adjustment Daily Work Report that documents the original creator of the DWR that needs a change as well as the Project Engineer/Supervisor editing the DWR. A manual with step-by-step directions and procedural guidance can be found at https://netservices.indot.in.gov/sitemanager/ **(a copy of this manual is attached)**. The Technical Services team will also be available to help employees with utilizing this new feature. See the contact information below.

Questions or comments regarding these documents should be directed to the Management of Information Systems or Technical Services contacts below:

- Steve Fisher, ASAP Intermediate: 317-234-3570
- Ahmed Siddiqui, ASAP Senior: 317-232-0230
- Meghan McGill, SiteManager Analyst: 317-234-5136
- Joshua Kiilu, SiteManager Analyst: 317-232-5547

MAM/mem

DWR Adjustment Feature

For Project Engineers/Supervisors

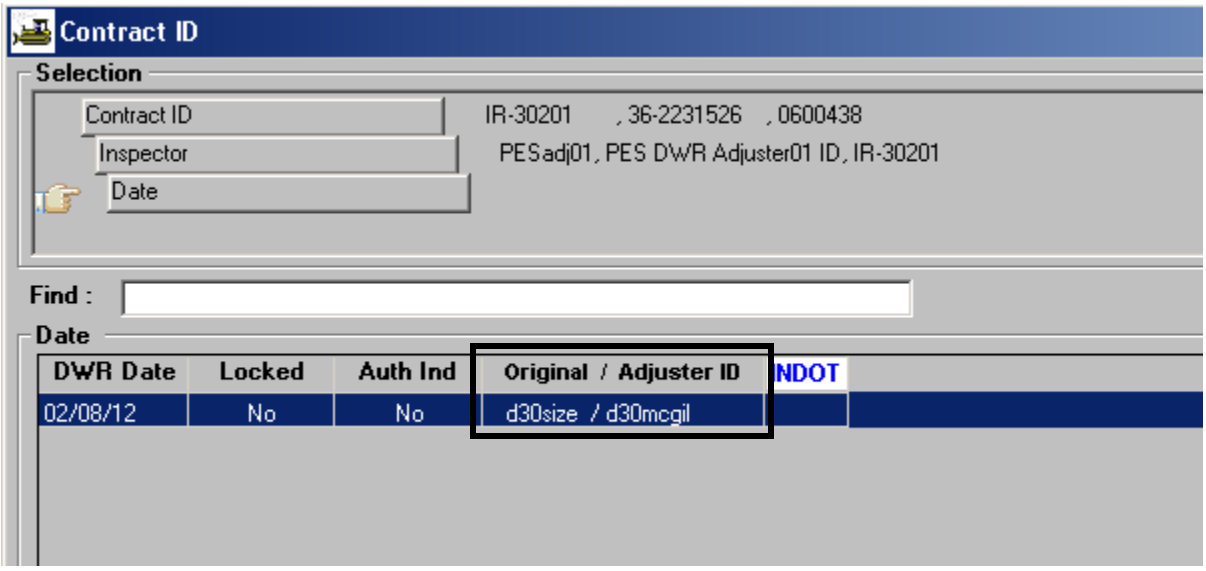
Date: November 2012
Manual Version: 1
SiteManager Version: 3.13a

The Daily Work Report (DWR) Adjustment Feature

The Daily Work Report (DWR) Adjustment Feature can be used by a Project Engineer or Project Supervisor to make adjustments to another employee's Daily Work Report when an error is identified on that DWR. This feature is optional, but can be used to prevent removing an employee from overseeing critical operations taking place on the jobsite.

DWR Adjustments can only be made on Daily Work Reports that have not been authorized and have not been paid. The Project Engineer/Supervisor can only make an adjustment on a contract he or she has authority on. Remarks are required to document why the adjustment was necessary and can be viewed on the **Daily Work Report Adjustment Report** on the SiteManager Reports Webpage.

Documentation of the DWR Adjustment appears when opening a Daily Work Report, viewing a Daily Work Report, and viewing the Diary. On these screens, there is a field titled **Original / Adjuster ID**. This field lists the user ID of the person who created the Original DWR and the user ID of the Project Engineer or Supervisor who adjusted the quantities.

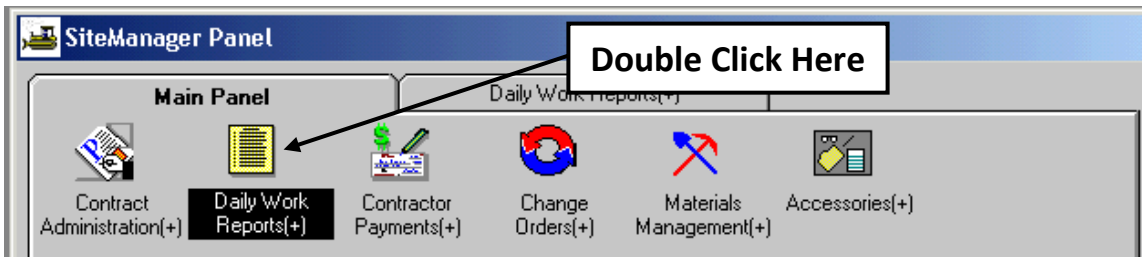


The Open DWR Window
Figure 1-1

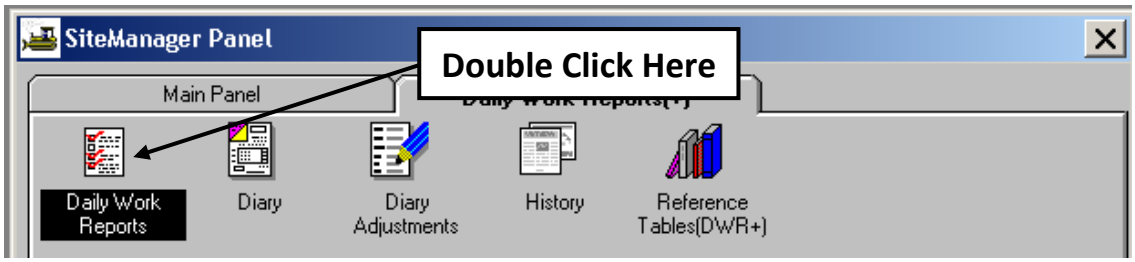
Adjusting a Daily Work Report

To adjust a Daily Work Report:

1. On the **SiteManager** main panel, double -click the **Daily Work Reports** icon.

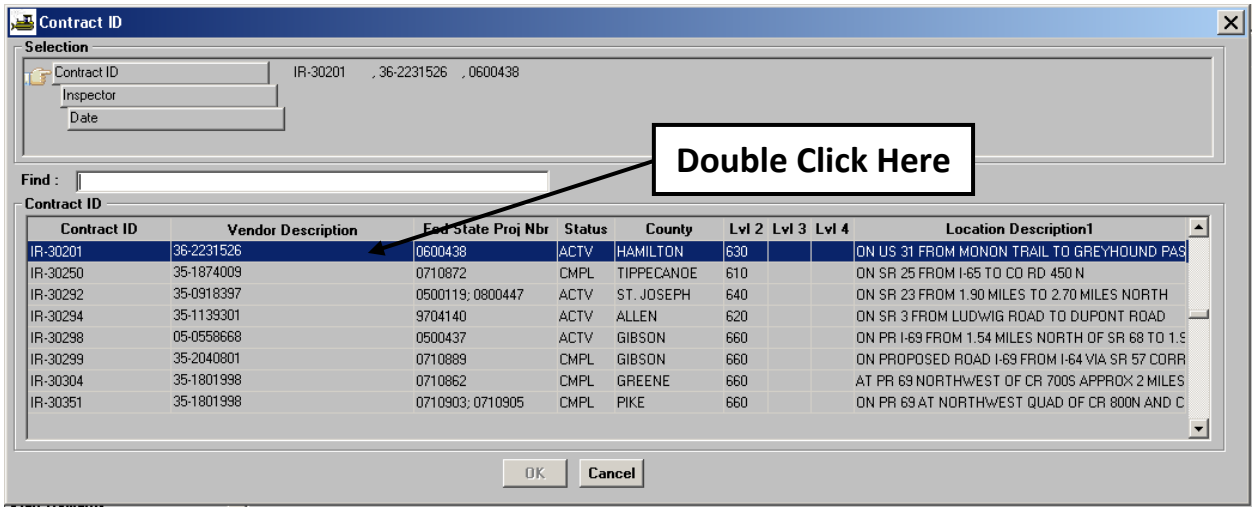


2. On the **Daily Work Reports** panel, double -click the **Daily Work Reports** icon.

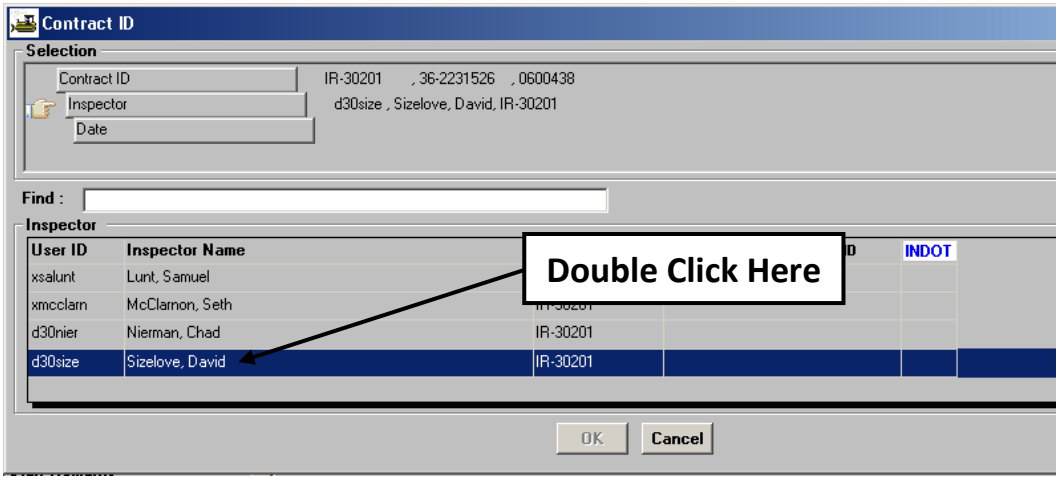


3. Click the **Open** button or click the **File** menu and click **Open**.

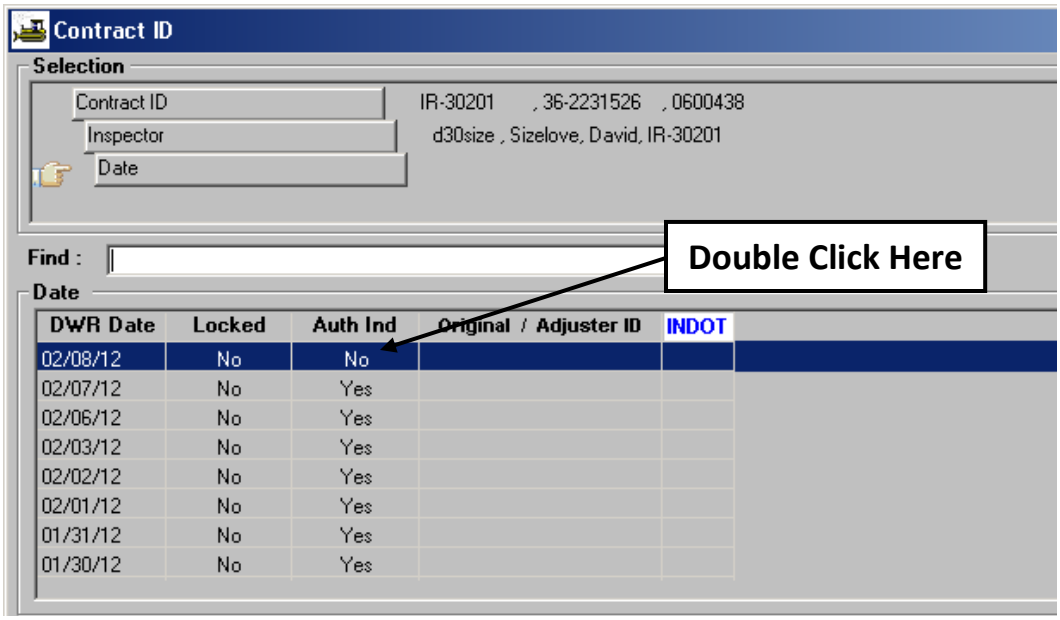
4. In the **Contract ID** list box, scroll to and double-click desired Contract.



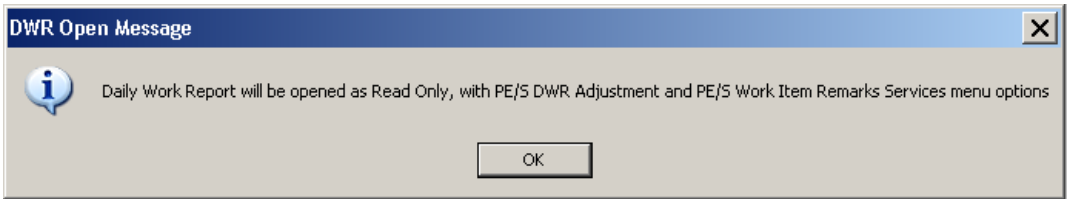
5. On the **Inspector** list box, scroll to and double-click the User ID you wish to adjust.



6. On the **Date** list box, scroll to and double-click desired DWR Date. Only DWRs with a No in the **Auth Ind** column can be adjusted.

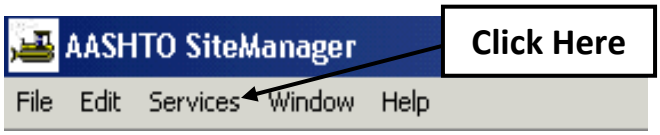


7. Select **OK** when the following message appears.

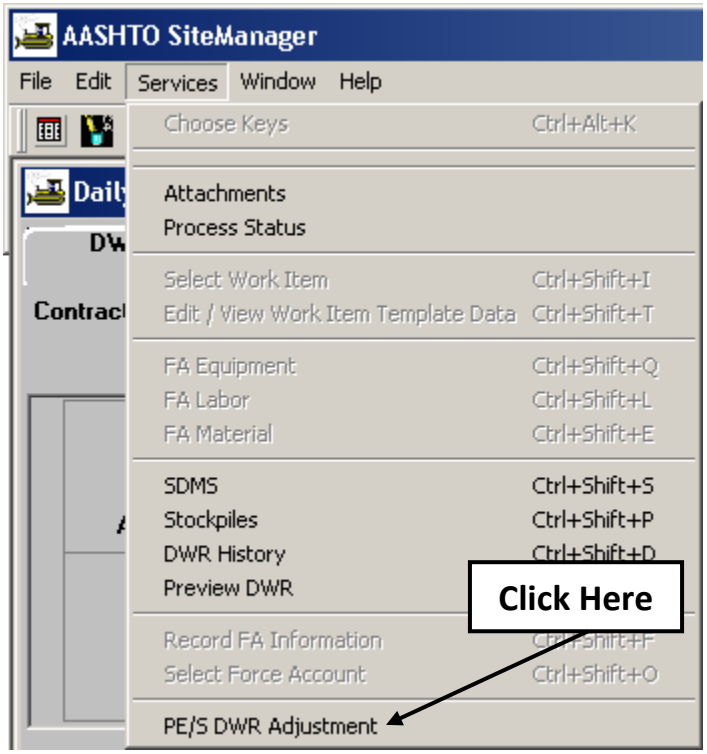


The selected **Daily Work Report** will open.

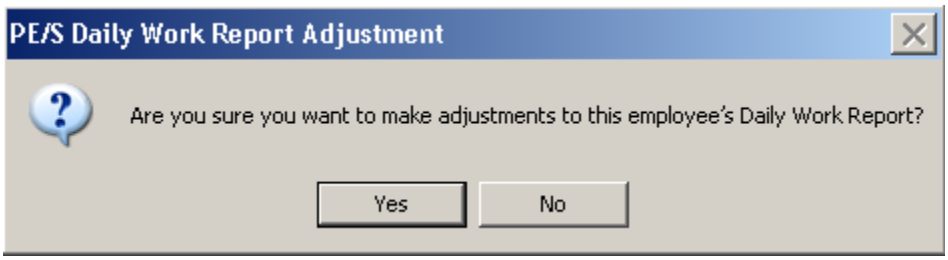
8. On the Menu, click on the **Services** option.



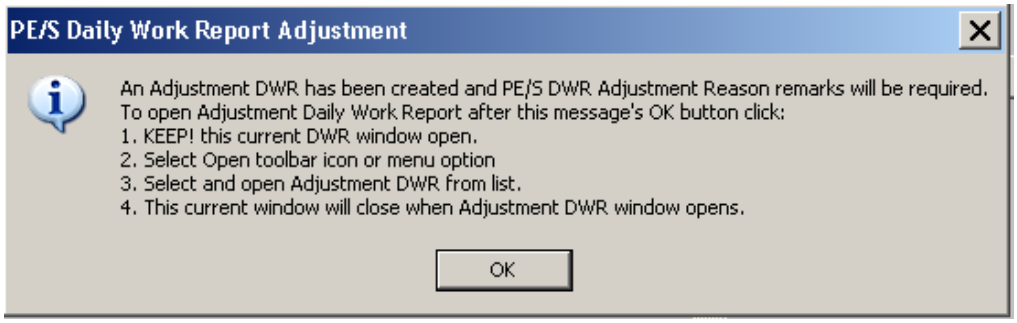
9. Select **PE/S DWR Adjustment**.



10. Select **Yes** when the following message appears.

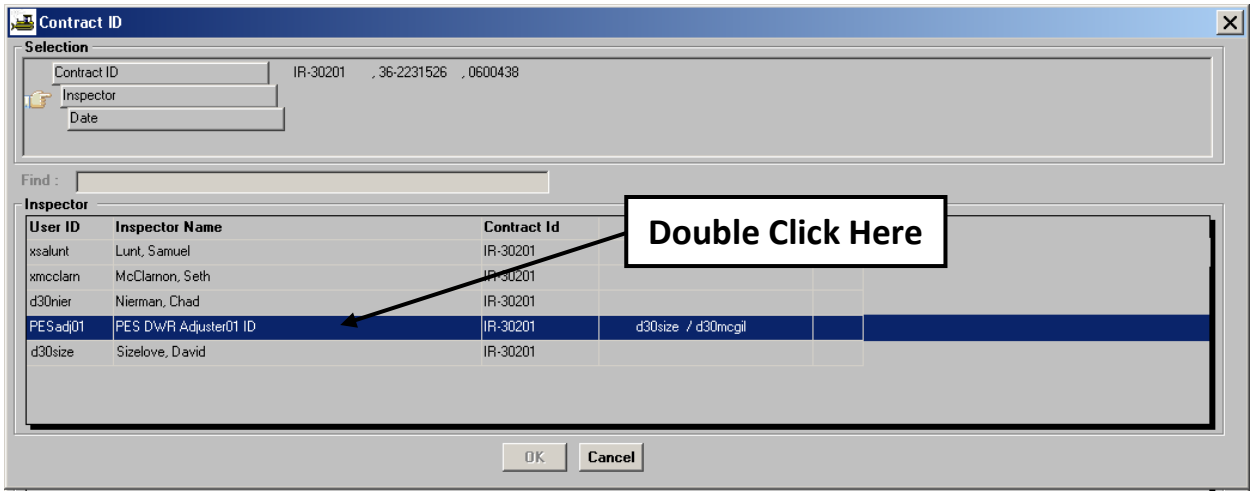


11. Select **OK** after reading the instructions on the message below. These instructions help the user navigate steps 12 – 14 of this manual.

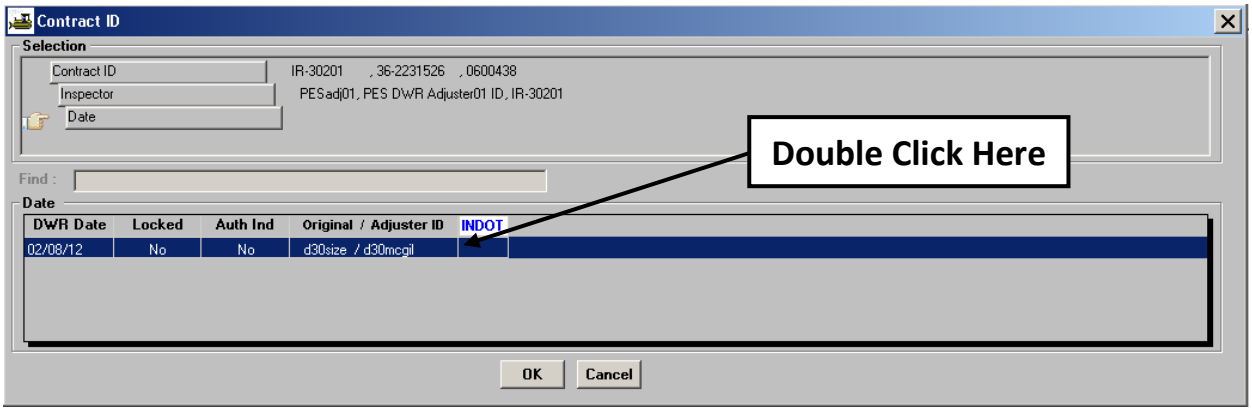


12. Click the **Open** button or click the **File** menu and click **Open**.

13. On the **Inspector** list box, scroll to and double-click the "PES DWR Adjuster ID"

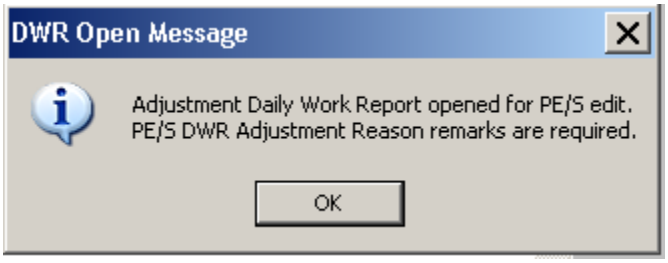


14. On the **Date** list box, scroll to and double-click the same date of the Original Daily Work Report. Use the **Original / Adjuster ID** field to ensure it is the correct DWR.

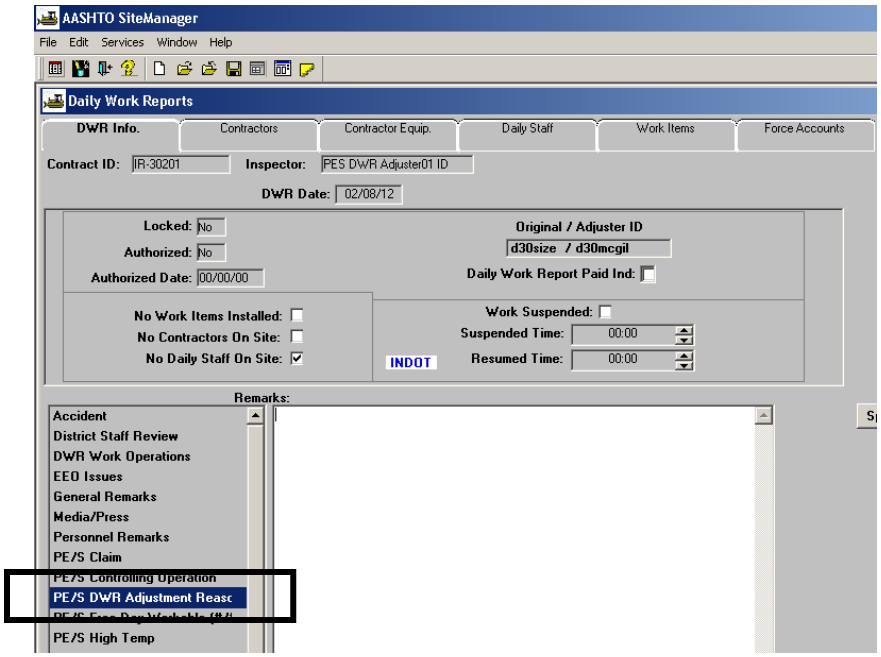


The selected **Adjustment Daily Work Report** will open.

15. Select **OK** when the message stating the Remarks are required appears.



16. Type the reason for the adjustment in the **PE/S DWR Adjustment Reason** field.



17. Click the **Save** button.

18. Click the **Work Items** folder tab.

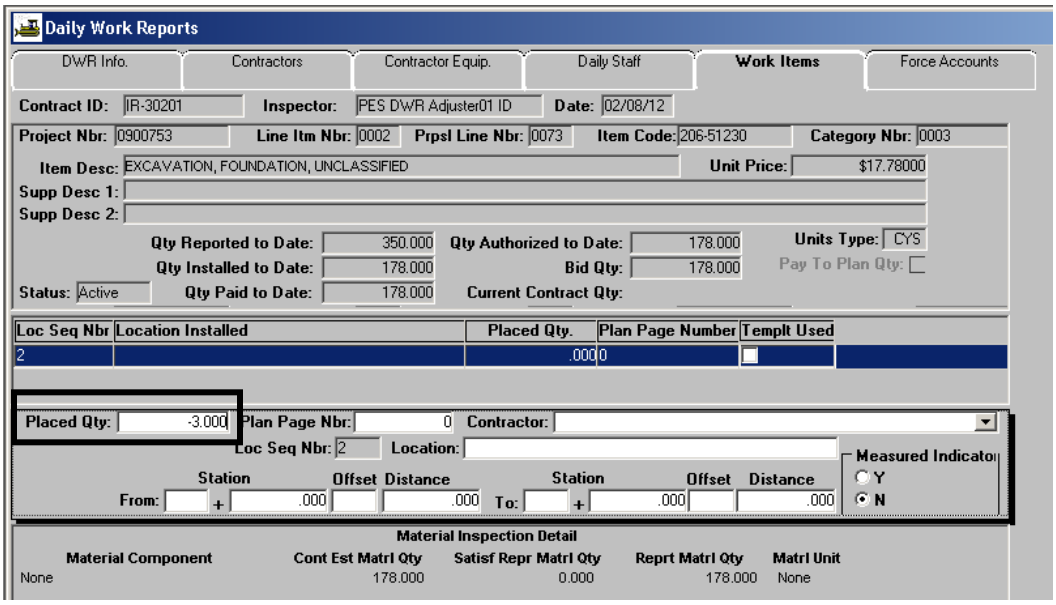
19. In the **Work Item** list box, scroll to and click the work item whose record needs to be adjusted.

20. Click the **Record Work Item** button.

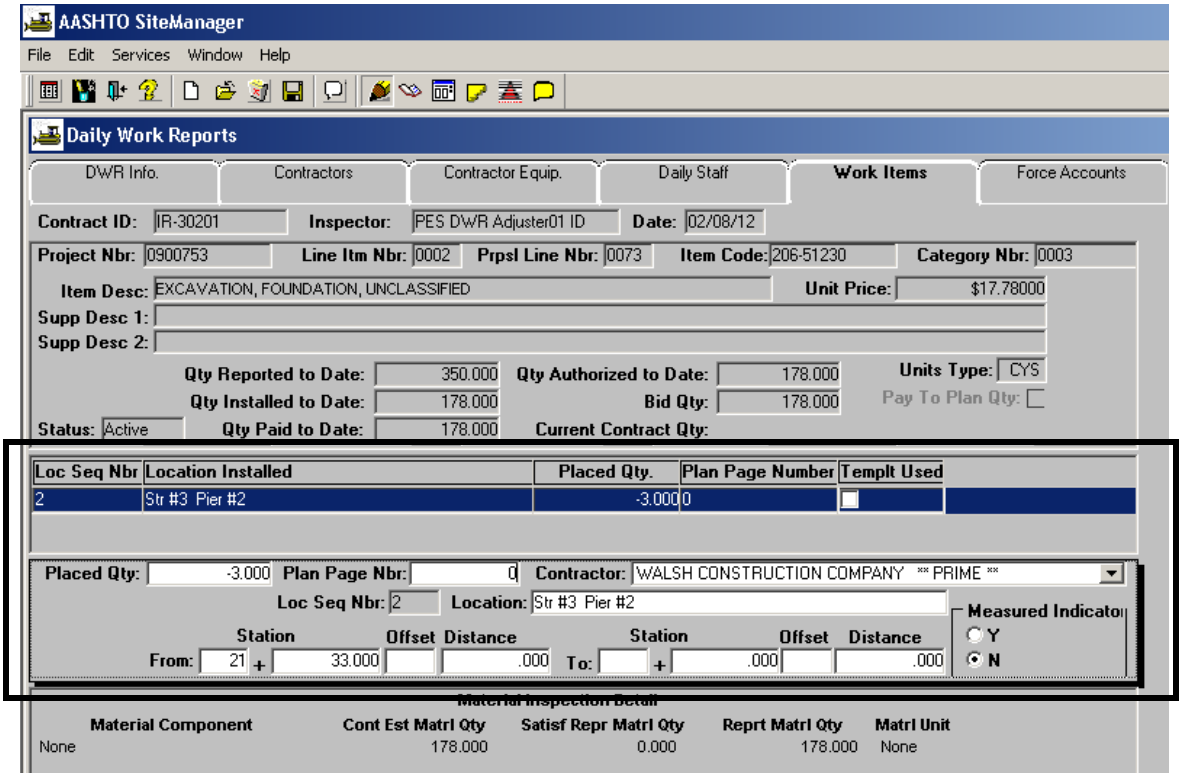
21. Select the **New** icon.

22. In the **Placed Qty** field, type the DIFFERENCE between the value entered on the Original DWR and the correct value. This value may often be a negative value.

If the **Placed Qty** field is grey, a template is available. The template window will open automatically after saving the other information on the tab or by clicking the **DWR Template** button. **If a template was used on the Original Daily Work Report, the same template must be used on the Adjustment Daily Work Report.**



Placed Qty values must represent the DIFFERENCE between the value entered on the Original DWR and the correct value. If the correct value alone is entered in the Adjustment DWR, then item quantities will be incorrect proceeding the Payment Estimate.



Record Work Items Window

Use for Steps 23 - 28

23. In the **Contractor** drop-down list, click the expand arrow and click the name of the Contractor responsible for the installed item.

24. In the **Location** field, type the location where the item was installed.

25. In the **From Station**, **From Station Offset**, and **From Station Distance** fields, type the Station ID, Offset, and Distance that identify where the installation of this Work Item begins.

26. In the **To Station**, **To Station Offset**, and **To Station Distance** fields, type the Station ID, Offset, and Distance that identify where the installation of this Work Item ends.

27. Click the **Save** button.

28. Click the **Select Work Item** button to select additional items for recording or return to the current DWR.

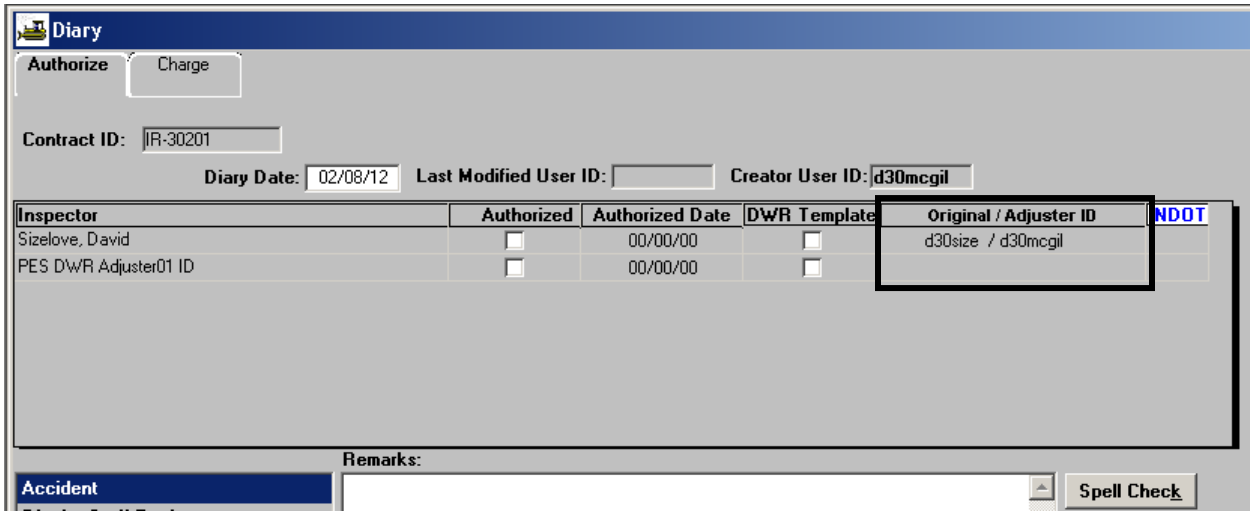
Repeat these steps for each **Work Item** that needs to be adjusted.

Viewing Adjusted Daily Work Reports in the Diary

Once a Project Engineer or Supervisor has completed all necessary adjustments to Daily Work Reports for a desired date, he or she can review and approve these Daily Work Reports in the Diary using the regular procedures.

On the window, there is a field titled **Original / Adjuster ID**. This field lists the user ID of the person who created the Original DWR and the user ID of the Project Engineer or Supervisor who adjusted the quantities. This allows the Project Engineer/Supervisor to reference the Adjustment Daily Work Report to the Original from which it was made before authorizing both Daily Work Reports.

Project Engineers and Supervisors must authorize both the Original Daily Work Report and the Adjustment Daily Work Report immediately following the Adjustment.



The Diary Window
Figure 1-2

Please note that in order for the Adjustment feature to have the intended effect, both the Original Daily Work Report and the Adjustment Daily Work Report must be authorized. If only one or the other is authorized, the Estimate will be incorrect.