SiteManager Training Manual

Module A
Chapter 1

Contract Administration
Contract Records

Section A-2-9-1

Checklist Schedule Event Dates Adding, Modifying and Deleting

Student's Version
Indiana Department of Transportation
October 2007, Version 3.7b

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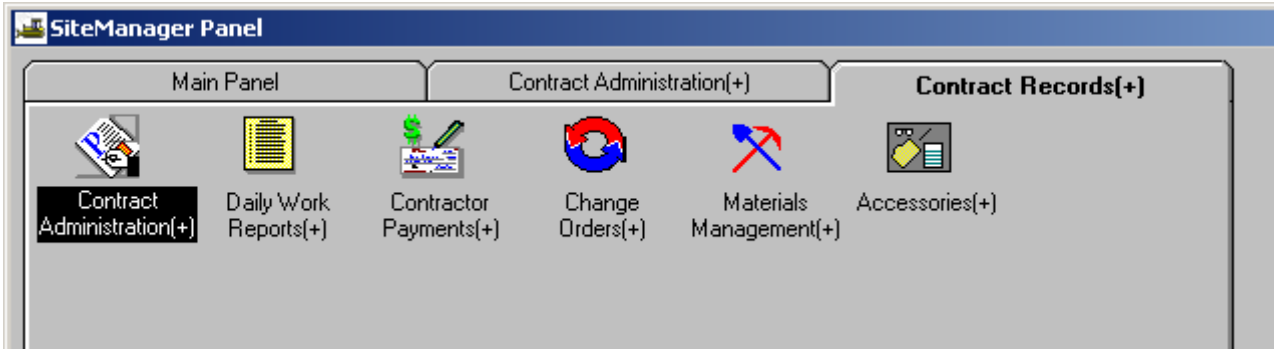
Checklist Scheduled Event Dates

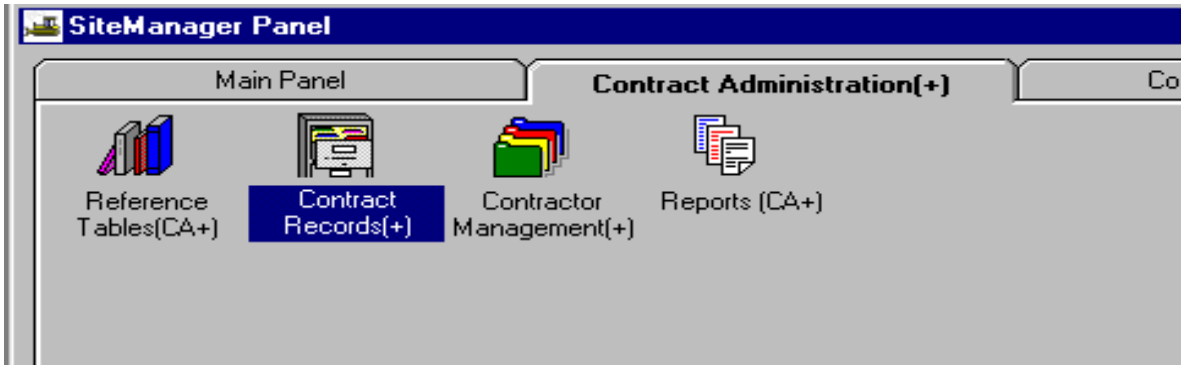
The Checklist Scheduled Events widow is a list of scheduled events for a selected Contract. The event can be flagged so that a discrepancy notice will occur after an estimate has been generated when the Projected Date has passed and the Actual Date has not been entered. This module will explain how to set up, modify and delete Checklist Schedule Event Dates.

The following table of Checklist Event Dates comes from the Contract Finalization Procedure:

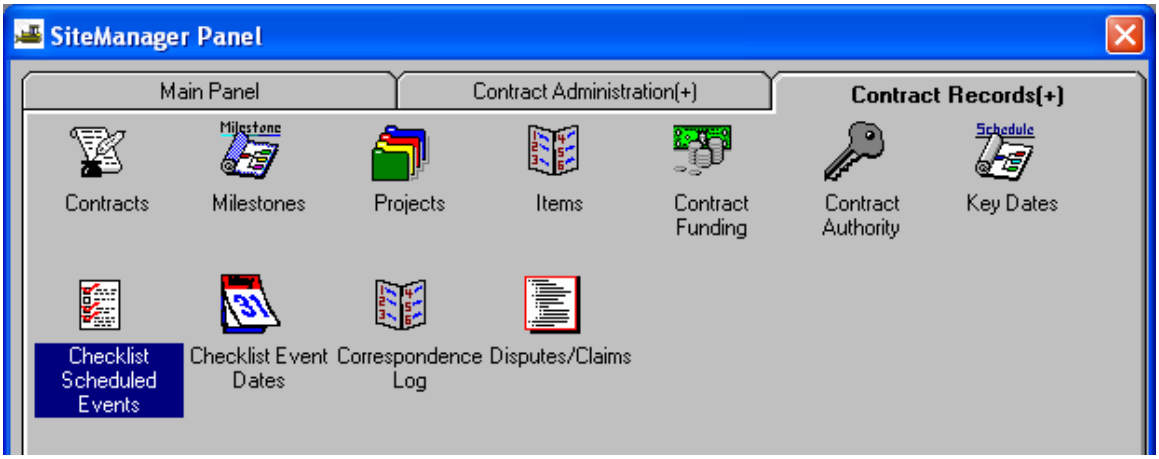
Applies to Contract	Checklist Event Date	User Who Populates	Recipient	Discrepancy Indicator
☐	As-Built Plans	PE/S	District Review Officer	N
☐	Asbestos Exclusion Letter	PE/S	District Review Officer	N
☐	Buy American Certificate	PE/S	District Review Officer	N
☐	CR-2	PE/S	District Review Officer	Y
☐	Cross Sections	PE/S	District Review Officer	N
☐	Plan Evaluations	PE/S	District Review Officer	Y
☐	Acceptance Letter	PE/S	District Review Officer	N
☐	Material Certification Letter	District Review Officer	District Review Officer	N
☐	Property Release	PE/S	District Review Officer	N
☐	Railroad Release	District Review Officer	Central Office Review Officer (30 Day Release)	N
☐	M-39	District Review Officer	Central Office Review Officer	N
☐	FHWA-47	District Review Officer	Central Office Review Officer	N
☐	Suspension of Work	PE/S	AE	N
☐	Resume Work	PE/S	AE	N
☐	Partial Acceptance	PE/S	District Review Officer	N
☐	Open to Unrestricted Traffic	PE/S	District Review Officer	N
☐	DBE Utilization	Central Office Review Officer	Central Office Review Officer	Y



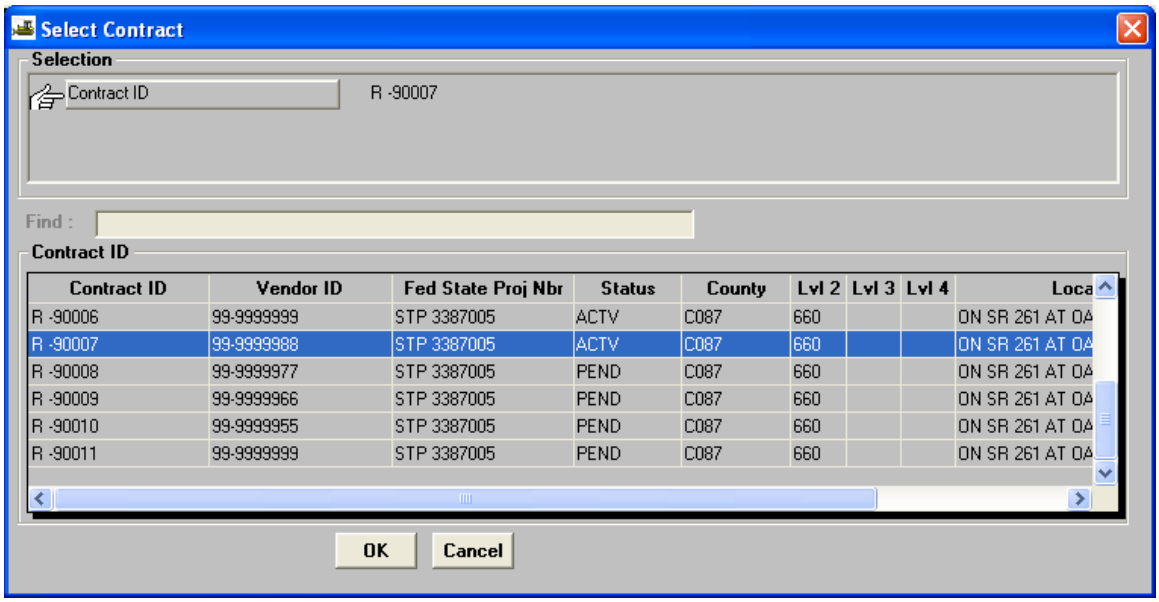
"Double-click" on **Contract Administration (+)** located on the **Main Panel**.



"Double-click" **Contract Records (+)**.



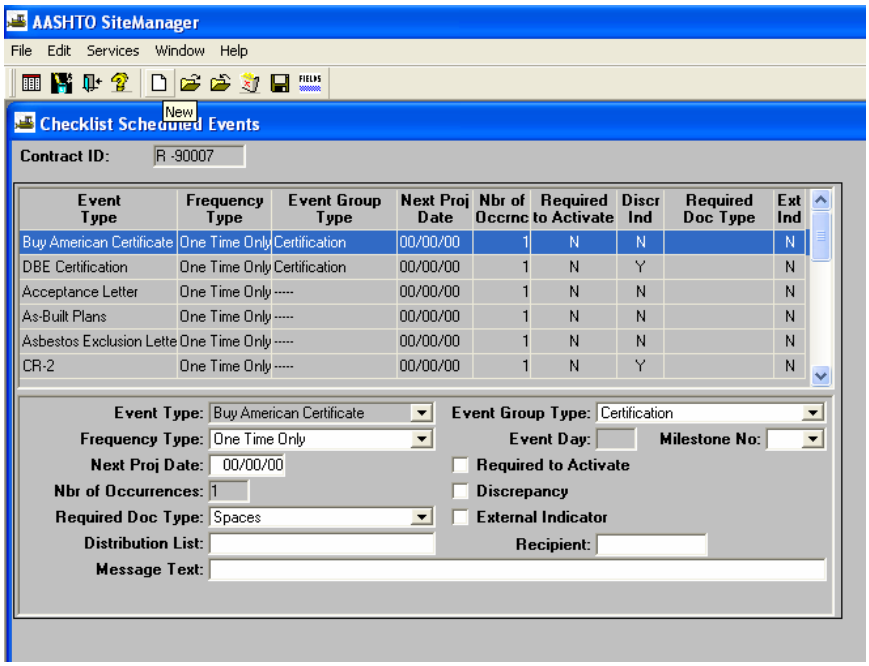
"Double-click" on **Checklist Scheduled Events**.



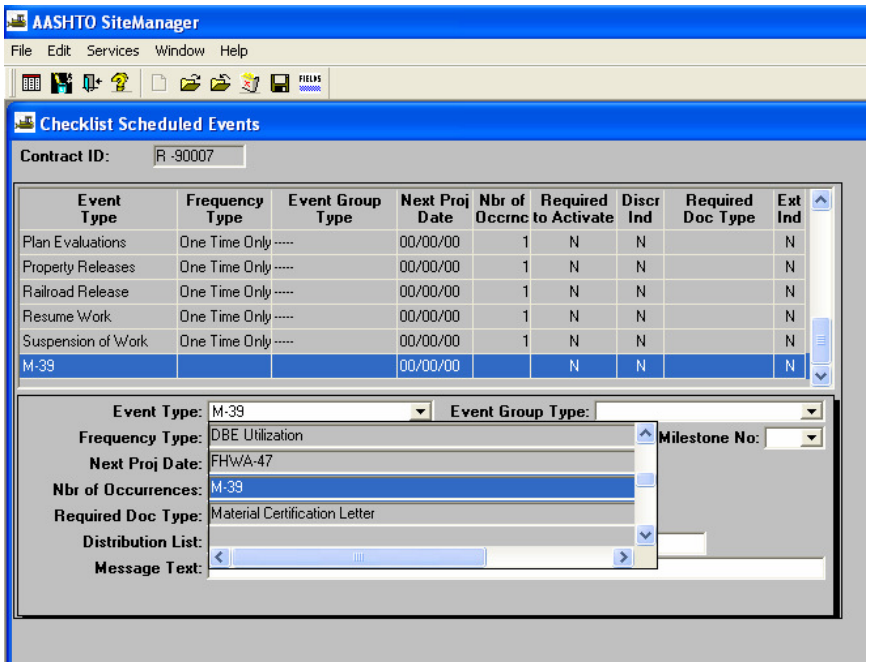
The Select Contract window opens.
The Bottom Panel contains the following columns:

- **Contract ID:** is the identification number assigned to the contract.
- **Vendor ID:** is the INDOT assigned identification number for the Prime Contractor.
- **Fed State Proj Nbr**: is the unique identifier for the project.
- **Status**: column indicates current status of the project, Active, Pending, Complete, or Archived.
- **County**: column shows the county where the majority of the work is located.
- **Lvl 2**: The **Lvl 2** column indicates the District Office administering the contract.
- **Lvl 3:** The **Lvl 3** column is not utilized by INDOT.
- **Lvl 4:** The **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column is the description of the actual work location.

Use the Find, Filter or Sort functions to locate the appropriate Contract.
"Double-click" on the appropriate **Contract ID**.
If a contract had been previously open, this step will be skipped.

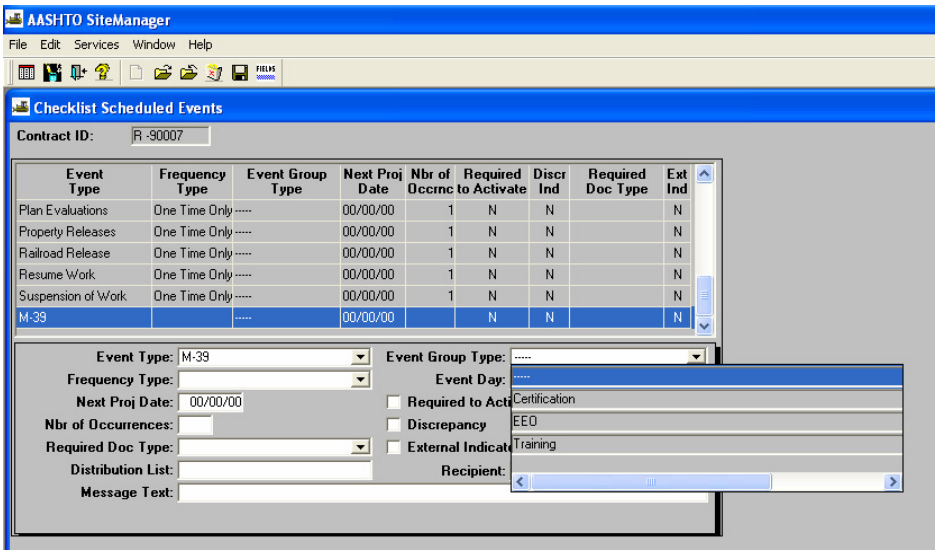


"Click" on the **New** button located on the toolbar.



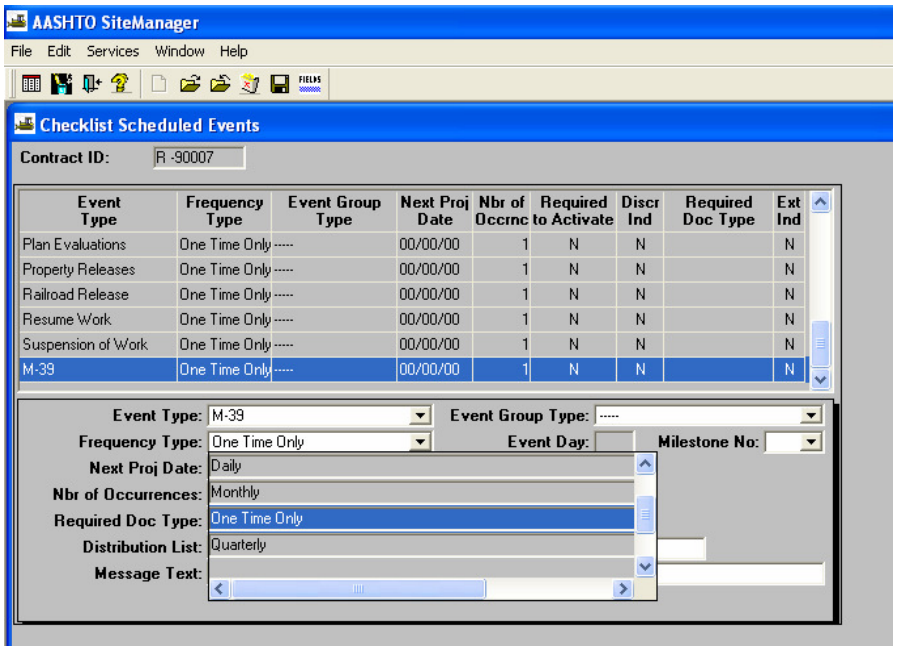
Event Type: The **Event Type** field contains the scheduled events available for contracts.

"Click" on the drop-down list and select the appropriate **Event Type**.



Event Group Type: The **Event Group Type** drop-down list contains the types available for contracts.

"Click" on the Event Group Type drop-down list.
"Click" on the appropriate Event Group Type.



Frequency Type: the **Frequency Type** drop-down list contains the occurrence of notification. The choices are:

- Annually
- Daily
- Bi-Weekly
- Monthly

"Click" on the drop-down list and select the appropriate **Frequency Type**.

AASHTO SiteManager

File Edit Services Window Help

Checklist Scheduled Events

Contract ID: M -25006

Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc	Required to Activate	Discr Ind	Required Doc Type	Ext Ind
Construction Signs Remc	One Time Only	-----	04/06/01		N	Y	Pre-letting Questi	N
Other	One Time Only	-----	06/08/01		N	Y		N
As-Built Plans for Traffic	Bi-Weekly	-----	00/00/00		N	N		N

Event Type: As-Built Plans for Traffic
Event Group Type: -----
Frequency Type: Bi-Weekly
Event Day:
Milestone No:
Next Proj Date: 00/00/00
Required to Activate
Nbr of Occurrences:
Discrepancy
Required Doc Type:
External Indicator
Distribution List:
Recipient:
Message Text:

Event Day: the **Event Day** is the date of the week or month that the event will occur.

"Enter" the appropriate date in the **Event Day** field, if applicable.

AASHTO SiteManager - [Checklist Scheduled Events]

File Edit Services Window Help

Contract ID: R -90007

Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc	Required to Activate	Discr Ind	Required Doc Type	Ext Ind
Plan Evaluations	One Time Only	-----	00/00/00	1	N	N		N
Property Releases	One Time Only	-----	00/00/00	1	N	N		N
Railroad Release	One Time Only	-----	00/00/00	1	N	N		N
Resume Work	One Time Only	-----	00/00/00	1	N	N		N
Suspension of Work	One Time Only	-----	00/00/00	1	N	N		N
M-39	One Time Only	-----	00/00/00	1	N	N		N

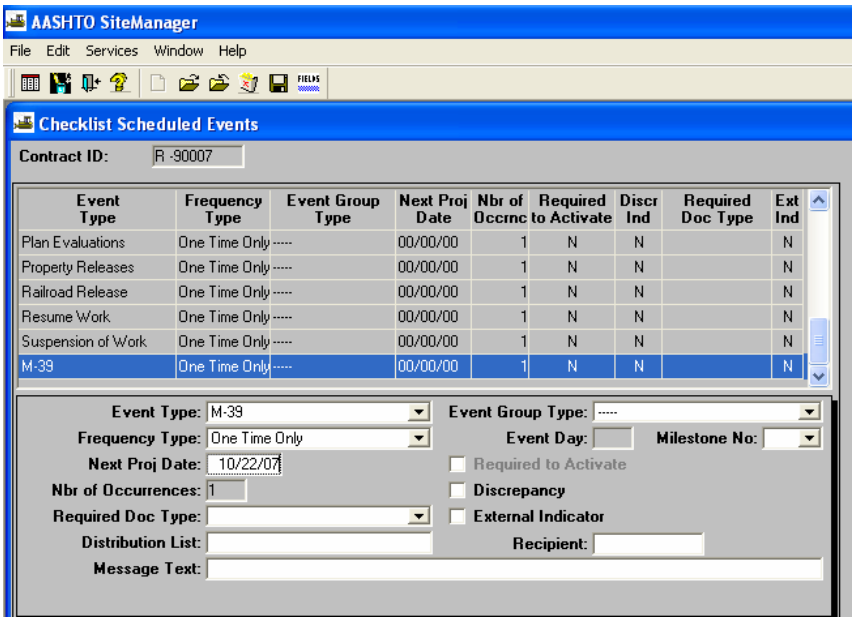
Event Type: M-39
Event Group Type: -----
Frequency Type: One Time Only
Event Day:
Milestone No:
Next Proj Date: 10/20/06
Required to Activate
Nbr of Occurrences: 1
Discrepancy
Required Doc Type:
External Indicator
Distribution List:
Recipient:
Message Text:

Milestone Number: the **Milestone Number** contains milestones that have been associated to the selected contract.

"Click" on the **Milestone Number** drop-down list and select the appropriate milestone, if applicable.

Next Proj Date: the **Next Proj Date** field contains the first or the next date the event is schedule to occur.

"Enter" the appropriate date in the **Next Proj Date** field.



Required to Activate: the **Required to Activate** check box is required if the event type selected is required to occur before the contract can be placed from pending to activated within SiteManger.

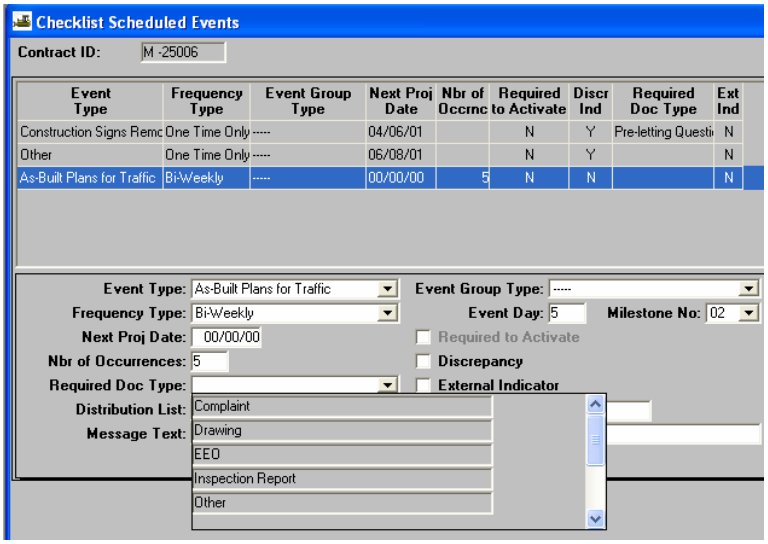
"Click" on the **Required to Activate** check box, if applicable.

Nbr of Occurrence: the **Number of Occurrence** field contains the amount of times the Event will occur for the selected **Frequency Type.**

"Enter" the appropriate number in the **Nbr of Occurance** field, if applicable.

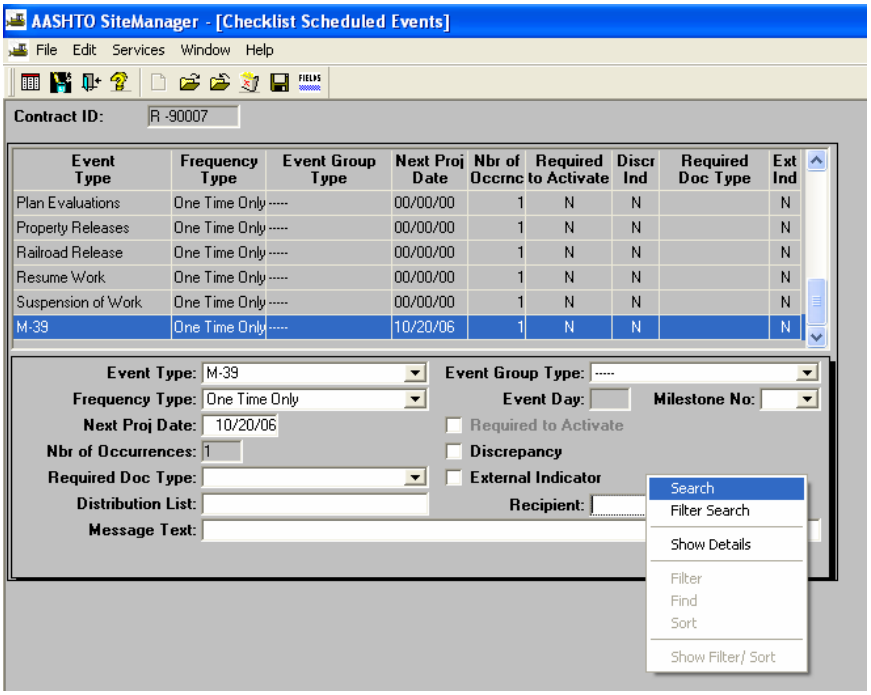
Discrepancy: when the **Discrepancy** check box is flagged a discrepancy notice will be sent to the recipient after an estimate is generated if the Projected Date has occurred and the Actual Date has not been entered.

"Click" on the **Discrepancy** check box, if applicable.



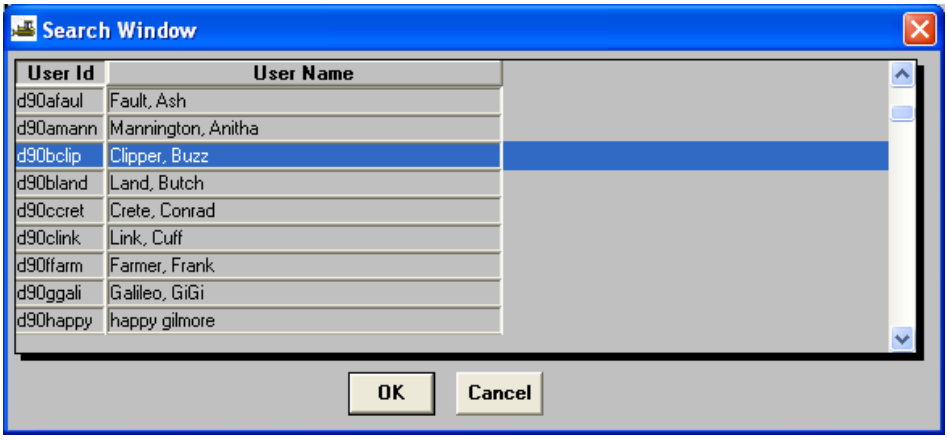
Required Doc Type: the **Required Doc Type** is the type of document required when an external indicator is flagged.

"Click" on the **Required Doc Type** drop-down lists, and select the appropriate type, if applicable.

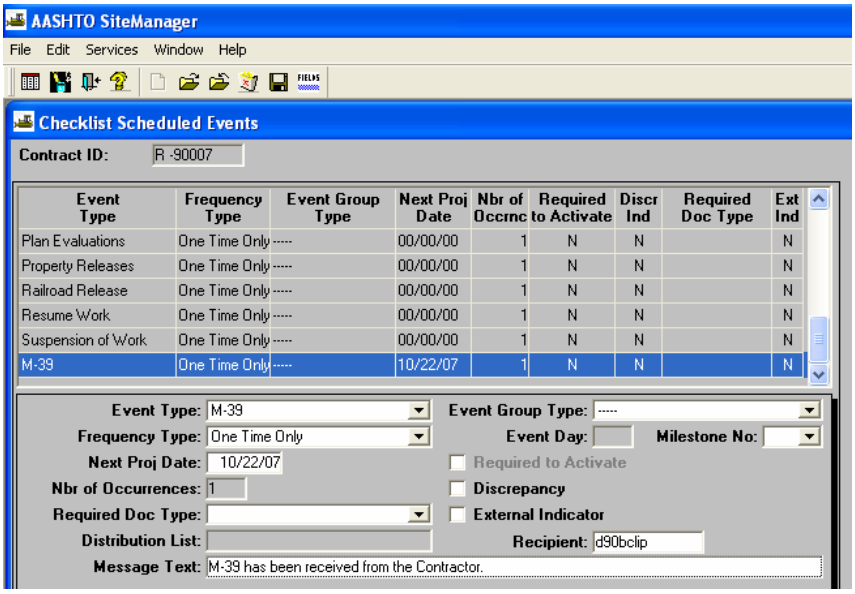


Distribution List: the **Distribution List** is not utilized by INDOT.

Recipient: the **Recipient** is the user id of the person to be notified when the Actual Date is populated.
"Right-click" in the Recipient field.
"Click" on **Search**.



"Double-click" on the appropriate **User Name**.



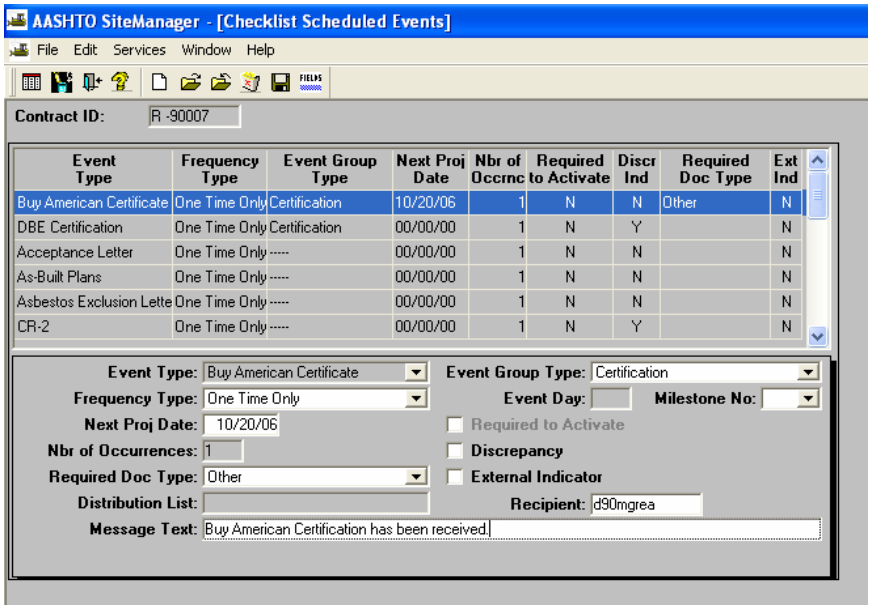
Message Text: Message Text is a message that will be sent to the Recipient via a SiteManager InBox notification when the Actual Date is populated.

"Enter" a message in the **Message Text** field.

"Click" on the **Save** button.

"Click" the **Close** button located on the toolbar to exit the **Checklist Scheduled Event Dates** Window.

Modifying a Checklist Event Date



"Click" on the appropriate Checklist Event to modify.

Event Group Type: The **Event Group Type** drop-down list contains the types available for contracts.
"Click" on the Event Group Type drop-down list.
"Click" on the appropriate Event Group Type, if applicable.

Frequency Type: the **Frequency Type** drop-down list contains the occurrence of notification. The choices are:

- Annually
- Bi-Weekly
- Daily
- Monthly

"Click" on the drop-down list and select the appropriate **Frequency Type,** if applicable.

Event Day: the **Event Day** is the date of the week or month that the event will occur.
"Enter" the appropriate date in the **Event Day** field, if applicable.

Milestone Number: the **Milestone Number** contains milestones that have been associated to the selected contract.

"Click" on the **Milestone Number** drop-down list and select the appropriate milestone, if applicable.

AASHTO SiteManager - [Checklist Scheduled Events]

File Edit Services Window Help

Contract ID: R -90007 Save

Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc	Required to Activate	Discr Ind	Required Doc Type	Ext Ind
Buy American Certificate	One Time Only	Certification	10/20/06	1	N	N	Other	N
DBE Certification	One Time Only	Certification	00/00/00	1	N	Y		N
Acceptance Letter	One Time Only	-----	00/00/00	1	N	N		N
As-Built Plans	One Time Only	-----	00/00/00	1	N	N		N
Asbestos Exclusion Lette	One Time Only	-----	00/00/00	1	N	N		N
CR-2	One Time Only	-----	00/00/00	1	N	Y		N

Event Type: Buy American Certificate
Event Group Type: Certification
Frequency Type: One Time Only
Event Day:
Milestone No:
Next Proj Date: 10/20/06
Required to Activate
Nbr of Occurrences: 1
Discrepancy
Required Doc Type: Other
External Indicator
Distribution List:
Recipient: d90mgrea
Message Text: Buy American Certification has been received.

Next Proj Date: the **Next Proj Date** field contains the first or the next date the event is schedule to occur.
"Enter" the appropriate date in the **Next Proj Date** field.

Required to Activate: the **Required to Activate** check box is required if the event type selected is required to occur before the contract can be placed from pending to activated within SiteManger.
"Click" on the **Required to Activate** check box, if applicable.

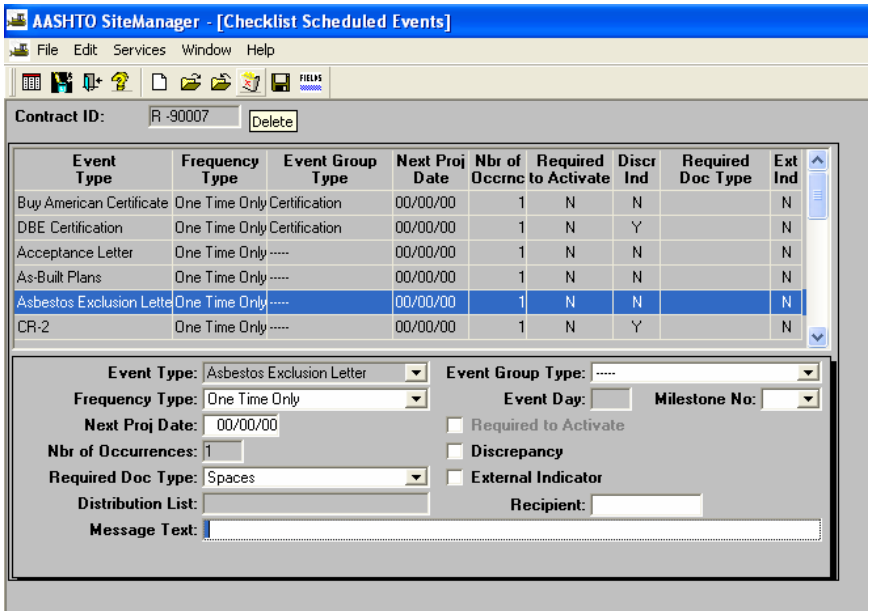
Nbr of Occurrence: the **Number of Occurrence** field contains the amount of times the Event will occur for the selected **Frequency Type.**
"Enter" the appropriate number in the **Nbr of Occurrence** field, if applicable.

Discrepancy: when the **Discrepancy** check box is flagged a discrepancy notice will be sent to the recipient after an estimate is generated if the Projected Date has occurred and the Actual Date has not been entered.
"Click" on the **Discrepancy** check box, if applicable.

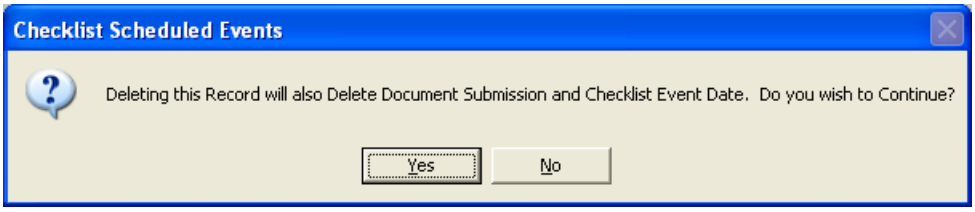
"Click" the **Save** button located on the toolbar.

"Click" the **Close** button located on the toolbar.

Deleting a Checklist Scheduled Event Dates



"Click" on the desired **Event type**.
"Click" the **Delete** button located on the toolbar.



This message will appear. "Click" the **Yes** button.

"Click" the **Save** button located on the toolbar.

"Click" the **Close** button located on the toolbar.

A-2-9-1 Group Exercise

The PE/S is reviewing the proposal and schedule at the beginning of the contract for R -90006. The contract is expected to be completed on October 20, 2006. The PE/S is modifying the As-Built Plans Checklist Event.
The PE/S has the following information:

The as-built plans will be turned in one time at the end of the contract.

The recipient is Jim Jolly.

"Double-click" on Contract Administration
"Double-click" on Contract Records
"Double-click" on Checklist Scheduled Event
"Click" Open

Double-click Contract ID	R -90006
Select Checklist Event	As-Built Plans
Enter Next Proj Date	10/20/06
Required Doc Type	Other
Recipient	ccjolly

Save
Close