



# INDIANA DEPARTMENT OF TRANSPORTATION

Driving Indiana's Economic Growth

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Mitchell E. Daniels, Jr., Governor  
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July 02, 2012

## CONSTRUCTION MEMORANDUM

12-06  
**REVISED**

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

FROM: Mark A. Miller, Director *Maleemil*  
Division of Construction Management

SUBJECT: SiteManager Field Enhancement Policies and Procedures

In an effort to ensure data integrity and increase efficiency of field and testing staffs, the documents listed have been prepared to formalize official changes in business processes.

“SiteManager Document Scanning Procedure”

“~~Centralized Type A Certification Scanning Procedures~~” **No longer in effect.**

“SiteManager Data Entry Policy” **Revised timeframes for HMA and lab soil samples.**

“Removal of Contractor and Local Public Agency Signature Requirement in SiteManager”

These policies and procedures will take effect immediately for all SiteManager users, with the exception of the “Removal of Contractor and Local Public Agency Signature Requirements in SiteManager” which will take effect **May 31<sup>st</sup>, 2012.**

These documents will be available on the SiteManager Enhancement SharePoint site and on the INDOT website.

Questions or comments regarding these documents should be directed to the contacts listed within the documentation.

(4) Attachments

MAM/mem

## SITEMANAGER DOCUMENT SCANNING PROCEDURE

### 1.1 Introduction

The purpose of this procedure is to establish standardized guidelines for the uploading of scanned documents into the SiteManager system. It has been identified that uploading scanned files is a time consuming process that leads to inefficiencies. Therefore, a revision has been made to the expectation of which documents need to be scanned and attached in the SiteManager system. All currently existing policies and procedures should continue to be followed unless distinctly changed by the following procedures.

### 1.2 Pre-Construction Conference Notes

The Project Engineer/Supervisor (PE/S) may choose whether to manually enter the pre-construction conference notes or to attach a document containing these notes. This information must be entered in the **Construction Conference** section of the SiteManager system; however, it only needs to be done using one of the two methods listed above.

### 1.3 Correspondence Log Documents

There are many documents acquired throughout the duration of the contract that are required to be included in the Final Construction Record (FCR). The full list of these documents can be found in Section 1.2 *Final Construction Record (FCR)* of the "Final Construction Record and Contract Finalization Procedures for SiteManager Contracts" document. Moving forward, these documents should no longer be scanned and attached in the **Correspondence Log** section of SiteManager. Instead, the records should continue to be maintained in a paper form only. They will be reviewed in paper form by the District audit, and when the FCR is complete at Central Office review, these documents will be scanned and entered into the Electronic Records Management System (ERMS) for permanent record. In order to increase efficiency in the field office and allow the Project Engineer/Supervisor to reduce their time in the SiteManager system, these documents should not be attached in the SiteManager system at any time.

#### 1.4 Type A Certifications

Type A Certifications contain pertinent material record information in the form of test data. For this reason, it is necessary that Type A Certification be scanned and uploaded into the SiteManager system. The PE/S or any individual on the job site will need to enter a record into the **Materials Sample Information** section of SiteManager and attach a scan of the Type A Certification to that **Material Sample**.

#### 1.5 Change Order Documents and Signature Page

Change Order documentation is crucial to the approval process of Change Orders in the SiteManager system. For this reason, the PE/S will continue to attach Change Order documentation. The PE/S will need to attach the document with the written signature of the Contractor and Local Public Agency (if applicable) to the **Change Order Header** section of SiteManager. Please do not attach this documentation in the **Correspondence Log** section of SiteManager.

#### 1.6 Other Documents

The above procedures are intended to include all documents that should be scanned and uploaded into the SiteManager system. At this time, Type A Certifications and Change Order documentation and signature pages should be the only documents required to be attached in the SiteManager system. Items such as paper Daily Work Reports, paper Material Test forms, and estimate print outs should *never* be uploaded into SiteManager. If a document is identified that the PE/S believes needs to be attached in the SiteManager system and is not addressed in this document, he or she should contact their Area Engineer before doing so. This will allow other potential required documents to be identified statewide and any concerns to be addressed. The Area Engineer should notify the appropriate person from Section 1.6 *Contacts* to make them aware that there is an additional document type that should be considered for scanning and uploading.

#### 1.7 Contacts

Questions, comments, and concerns regarding this procedure should be directed to the Technical Services Division contacts below.

- Meghan McGill, 317-234-5136
- Jennifer Boyd, 317-234-8310

Effective July 2<sup>nd</sup>, 2012,  
the Centralized Type A Certification Scanning Procedures are no longer in effect.

Superseded by Memo 17-03

## SITEMANAGER DATA ENTRY POLICY

### 1.1 Introduction

The purpose of this policy is to establish standardized guidelines for the entry of data into the SiteManager system in order to address efficiency and utilize the system according to its intended design. All current policies and procedures should continue to be followed unless distinctly changed by the following policy.

### 1.2 Personal Data Entry

All data collected by a Construction field employee will be entered into the SiteManager system by that employee. This allows supervisors to authorize information as intended. Under no circumstances will an employee log in or enter data into SiteManager using a login ID other than his or her own, as agreed to in the Information Resources Use Agreement. An employee's manager will not enter information into the SiteManager system unless one of the following exceptions exists:

1. A specific individual has been assigned to complete all paperwork for a contract as identified by the corresponding Area Engineer or District Construction Director.
2. An employee's absence from work is preventing payment being made to the contractor.

### 1.3 Data Entry Timeframes

#### 1.3.1 Data Entry Timeframes – Daily Work Reports

This policy ensures that information is entered in a timely manner and that the production of payment estimates will not be delayed. All information regarding contractor activity, personnel, equipment, and pay items will be entered into a **Daily Work Report** in the SiteManager system by the Project Engineer (PE), Project Supervisor (PS), or Highway Technician (HT) who observed the work within two work days of completion, excluding weekend days and State holidays.

### 1.3.2 Data Entry Timeframes – Material Sample Information

All information pertaining to materials produced or supplied on site should be entered into a **Material Sample Information** in the SiteManager system. If the sample contains test results, it should be entered by the Project Engineer (PE), Project Supervisor (PS), or Highway Technician (HT) who performed the test within ten working business days, excluding weekends and State holidays. HMA and soil samples taken to area or District labs are an exception to this timeframe, and will be entered within two (2) business days in order for the lab to have material sample records in which to enter test results. If the sample is for a certification, CAPP, or Material List Approval Number, it may be entered by any individual on the work site and should be completed within twenty working business days of the material being installed, excluding weekends and State holidays. An exception to this timeframe is a test that requires more than two weeks wait time before testing is completed, according to the Standard Specifications or Frequency Manual. This ensures that information is entered in a timely manner and expedites the completion of the Final Construction Record.

**Effective Date** April 30, 2012

**Revision Date** July 2, 2012

**Approval**



Mark Miller, Director, Division of Construction Management

**Date**



## REMOVAL OF CONTRACTOR AND LOCAL PUBLIC AGENCY SIGNATURE REQUIREMENT IN SITEMANAGER

### 1.1 Introduction

Currently the SiteManager system requires the Project Engineer/Supervisor (PE/S) to login as the roles of "Contractor" and "Local" (when applicable) in order to approve change orders for these groups. This practice creates an unnecessary and redundant process for the PE/S. The Management of Information Systems (MIS) division has made modifications to the SiteManager software and, as of May 31<sup>st</sup>, 2012, this requirement will no longer exist. The following information will specify how this will change the workflow of Change Orders procedure in the SiteManager system.

### 1.2 Current Practices

Currently, in the **Approving Change Orders** section of SiteManager, the PE/S must add himself as the approving authority for the "Contractor," "Project Engineer/Supervisor," and "Local" (if the contract is a Local Public Agency contract). The PE/S must separately login and approve the Change Order as the "Contractor" and "Local" (if applicable) before the change order can be reviewed and approved by the Area Engineer and any higher levels of authority.

### 1.3 New Practices – Effective May 31<sup>st</sup>, 2012

Beginning May 31<sup>st</sup>, 2012, the PE/S will only need to give himself Contract Authority for the "Project Engineer/Supervisor" group in the **Approving Change Orders** section of SiteManager. The PE/S will **NOT** need to add himself as the approving authority for the "Contractor" or the "Local." "Contractor" and "Local" approval in the SiteManager system will **no longer be required** before the change order can be reviewed and approved by the Area Engineer and any higher levels of authority. Therefore, the PE/S will no longer be responsible for any approval of Change Orders within the SiteManager system. Instead, the PE/S will be required to obtain signatures from the Contractor and the Local Public Agency (if applicable). These signatures will then need to be scanned and attached into the **Change Order Header** section of SiteManager upon their receipt.

### 1.3 Contacts

Questions, comments, and concerns regarding this procedure should be directed to the Technical Services or Management of Information Systems contacts below.

- Meghan McGill, Technical Services: 317-234-5136
- Jennifer Boyd, Technical Services: 317-234-8310
- Steve Fisher, Management of Information Systems: 317-234-3570
- Ahmed Siddiqui, Management of Information Systems: 317-232-0230

Superseded by Memo 17-03