



INDIANA DEPARTMENT OF TRANSPORTATION

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Eric Holcomb, Governor
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February 24, 2017

CONSTRUCTION MEMORANDUM 17-03

TO: District Deputy Commissioners
District Construction Directors
District Technical Services Directors
District Area Engineers
District Project Management Director
Project Management Director
District LPA Coordinators
Field Engineers
Project Engineers/Supervisors

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

SUBJECT: SiteManager Policies and Procedures Update

SUPERSEDES: Construction Memorandum 12-06

The purpose of this memorandum is to notify all field personnel of the updated SiteManager Policies and Procedures. The following policy and procedures have been revised and are effective immediately.

- SiteManager Document Scanning Procedure
- SiteManager Data Entry Policy

These documents can be found at the end of this construction memorandum and will also be available on INDOT Construction Information website.

Any questions or comments should be directed to the Division of Construction Management through the channels of your respective district Field Engineer.

(2) ATTACHMENT

MAM/ggp/ddh

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.

- Joshua Kiilu at jkiilu@indot.in.gov or 317-232-5547
- Ellis Holder at eholder@indot.in.gov or 317-232-0678
- Greg Logman at glogman@indot.in.gov or 317-233-8577

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.
3. A Consultant may enter test data for a Sub-consultant that performed the test. In this case, both the Consultant and Sub-consultant must be qualified in the test method that was performed.

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 within ten working business days, excluding weekends and State holidays by the Project Engineer (PE), Project Supervisor (PS), or Highway Technician (HT) who performed the test. 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 February 24, 2017

Approval



Mark Miller, Director, Division of Construction Management

Date

