

Engineer's Estimating, Bidding, Award, and Construction System (EEBACS)

EEBACS 1.0 User Guide

**CONTRACTOR
VERSION**

EEBACS USER GUIDE 1.0

CONTRACTOR VERSION

UPDATED: 05.01.2012

Preface

This Guide is intended for Contractor users granted access to the Federal Lands Highway's (FLH) Engineer Estimating, Bidding, Award and Construction System (EEBACS).

The program was developed through a cooperative effort of the men and women of Central Federal Lands, Eastern Federal Lands, and Western Federal Lands. Technical development of the program was accomplished by Symplicity Corporation of Arlington, Virginia.

Notice

The U.S. Government assumes no liability for the use of the information contained in this document. This report does not constitute a standard, specification, or regulation.

The U.S. Government does not endorse products or manufacturers. Trademarks or manufacturers' names appear in this manual only because they are considered essential to the objective of the document.

Structure

This document is an abridged version of a more extensive user's guide. Chapter 1 *System Overview* contains general information. Chapter 4 *Construction Module* is for users preparing documents while building and administering construction projects. Appendices contain information that may be used in more than one chapter or program or supplemental information to assist EEBACS users.

Chapter 1 - System Overview

TABLE OF CONTENTS	Page
1.1 Introduction	1-2
1.2 User Accounts	1-3
1.2.1 Required Information for User Account Requests.....	1-3
1.2.1.1 New User Account Requests	1-3
1.3 Accessing the System.....	1-4
1.3.1 Access through the World Wide Web (www)	1-4
1.3.2 Access off-line	1-4
1.3.3 How to Login	1-4
1.3.3.1 Login with Username and Password	1-4
1.3.3.1.1 Forgot Password.....	1-6
1.3.4 How to Logout	1-7
1.4 Home Page	1-9
1.5 Navigation	1-10
1.6 Projects (All) Directory	1-11
1.6.1 Project (All).....	1-11
1.7 <Reserved>	1-12
1.8 <Reserved>	1-12
1.9 <Reserved>	1-12
1.10 My Account	1-13
1.10.1 Changing a Password.....	1-13
1.10.2 Setting up a Security Question.....	1-14
1.11 Terms, Icons, and Abbreviations	1-15
1.11.1 Term and Icon Definitions	1-15
1.11.2 Abbreviations	1-21
1.12 Requesting Assistance	1-27

1.1 Introduction

The Engineer Estimating, Bidding, Award and Construction System (EEBACS) is an integrated system that provides for estimation, solicitation/award, and contract administration of FLH's construction projects. EEBACS is a Web-based system that is maintainable and scalable. Portions of the Construction module will also be offered in an off-line version – Not available, under development. EEBACS consists of a series of components that tracks costs from a project's inception through final acceptance.

The Construction module tracks information as the project progresses through construction. It provides for the development, approval, and tracking of payments for contract items. The Construction module also allow for tracking and management of other contract administration information including contract modifications, equipment, personnel, subcontractors, and contract status. In the Construction phase EEBACS provides the capability to:

- Create, track and approve Inspector Daily Reports (IDR);
- Create, track and approve Contractor Daily Reports (CDR);
- Create and track the Project Engineer's Daily Dairy;
- Track onsite personnel and equipment;
- Track subcontractors and associated information;
- Create and track Contract Modifications;
- Document and track contract administration and status;
- Create, track and approve payments to the contractor; and
- Generate detailed reports of how the project was constructed, including cost, equipment, and personnel.

Each module allows for the creation of various reports and documents as well as the system capability for overall project and system level reports and tracking.

EEBACS is not an electronic bidding or payment system.

1.2 User Accounts

1.2.1 Required Information for User Account Requests

For all user account requests, download the appropriate form, EEBACS-001, EEBAC-002, and/or EEBACS-004 and fill out requested information. Forms can be downloaded from <http://flh.fhwa.dot.gov/resources/pse/estimate/accounts.htm>.

- **EEBACS-001-AE-Staff-Construction-Contractors-Request-Form.** For AE Staff and Construction Contractors user account requests, including: adding new, modifying, disabling, or deleting user accounts.
- **EEBACS-002-Government-InHouse-Contractors-Request-Form.** For Government staff and In-house Contractors (i.e. users with @dot.gov email addresses), including: adding new, modifying, disabling, or deleting user accounts.
- **EEBACS-004 User Special Rights request.** For requesting special, additional rights. This form will rarely be used. In most cases, rights granted via EEBACS-001 and EEBACS-002, along with any needed Project Roles, will be sufficient for most users. Special System Rights/Special Project Roles will only be considered for Government or In-House contract users (users with @dot.gov email addresses).

User accounts are based on the business e-mail address given. Provide a business e-mail address that is unique to the individual requesting the EEBACS account.

Submit the form to your supervisor, Project Engineer, or COTR as directed on the form for the required approvals. Requests will then be forwarded to the Local Division's IT Service Desk.

To modify, disable, or delete a user account submit the appropriate user account form (EEBACS-001, EEBAC-002, and/or EEBACS-004). This same procedure should also be followed if your e-mail address changes.

1.2.1.1 New User Account Requests

Once the appropriate user request form has been approved, processed, and the new user account has been created, a randomly generated password will be sent to the e-mail account provided. The emailed password will come from noreply@symplicity.com.

Login to the system, see Section 1.3.

Upon successful login, go to "My Account" to change the password and set up a security question. See Section 1.10.1 for Password requirements, including expiration of passwords and DOT password standards. See Section 1.10.2 for setting up a security question.

1.3 Accessing the System

Access to the EEBACS modules is via the Internet (all modules). [At this time the off-line Construction module is still under development and not available for use].

1.3.1 Access through the World Wide Web (www)

To access EEBACS through the “www” enter:

<https://eebacs.fhwa.dot.gov/>

1.3.2 Access off-line

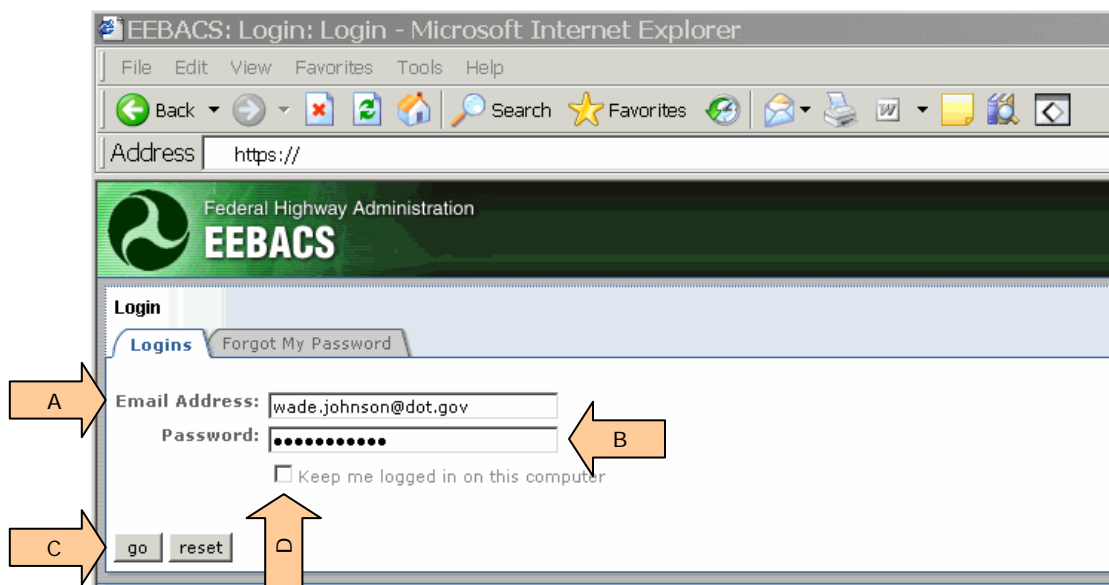
The Off-line Construction Module is still under development and not available for use.

1.3.3 How to Login

1.3.3.1 Login with Username and Password

Upon successfully navigating to the EEBACS Login page, input:

- A. the Email address (provided);
- B. your password; and
- C. Select the “go” button.
- D. **Do not** toggle on the “Keep me logged in on this computer” box.



Upon entering a valid username and password, the EEBACS Terms and Conditions and Rules of Behavior will appear.

💡 Forgot password? See Section 1.3.3.1.1.

Select "Accept" to enter EEBACS. (If you select "Decline" you will not be logged into EEBACS).

Terms and Conditions


You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

- Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.
- By using this information system, you understand and consent to the following:
 1. You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may monitor, intercept, search and seize any communication or data transiting or stored on this information system.
 2. Any communications or data transiting or stored on this information system may be disclosed or used for any purpose.

Rules of Behaviour

1. I will not knowingly introduce any malicious code into DOT computer systems nor will I attempt to bypass or circumvent its security features.

I understand that anyone found to violate these policies may be is subject to disciplinary and/or legal action, including but not limited to loss or limitation of use of information resources, termination of employment, or referral for criminal prosecution.



Successful access into the program will bring the user to the home page. If not successful, contact your Local Division's IT Service Desk (Government and internal contract employees) or your COTR (Construction contractors, A/E firms, or external contract employees).

User	163
Projects	822
Estimates	1108
Acquisition	769
Bids	2204

Depending on a user's "rights", various parts of the system can be viewed or manipulated. Rights are granted based upon the signed User Account form (EEBACS-001, EEBACS-002, and/or EEBACS-004), and entered into the system by your Local IT Service Desk when an account is first established. Rights may be changed depending on assignments and duties.

- 💡 If you do not feel appropriate "rights" have been assigned, contact your COTR, your local Component Lead, or the EEBACS Division Administrator. (In most cases additional, project specific user rights are granted when the user is added as a member of a Project Team. For Design users, see Chapter 2.3. For Construction users see Chapter 4.5).

1.3.3.1.1 Forgot Password

The Forgot Password function is only relevant when logging in with Username and Password method.

Select Forgot My password

Enter your Email below, click go, and your password will be reset and emailed to you.

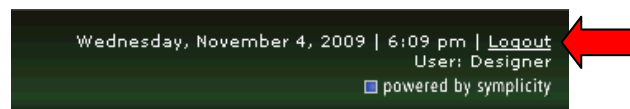
Email

- A. Enter the email address used for EEBACS
- B. If the user has set up a security question, it will appear here
- C. Enter the answer to your security question
- D. Select "Go"

- E. Confirming message appears.
(The emailed password will come from noreply@symplicity.com).

1.3.4 How to Logout

When a session is finished select the "Logout" hyperlink in the upper right corner of the screen.



To assist in program security, close the browser window or lock your workstation.

1.4 Home Page

Upon logging into the system the user first views the “Home” page. This page consists of a:

- Sidebar menu to navigate between the various modules, reporting types, Unit Price Analysis (UPA), and My Account (personal profile information);
- Expandable menu showing the number of people currently using the system;
- “Announcements” section that informs users of system events;
- “Recent Items” section that hyperlinks the user to areas within the program that was last visited;
- Calendar;
- “EEBACS Statistics” table that tracks specified items within the system.

Select the “hide menu” tab to collapse the sidebar for more viewing space

The screenshot shows the EEBACS Home Page interface. Callout A points to the sidebar menu, B to the Users Online section, C to the Announcements section, D to the Recent Items list, E to the calendar, and F to the EEBACS Statistics table.

EEBACS Statistics Table:

Category	Count
User	163
Projects	822
Estimates	1108
Acquisition	769
Bids	2204

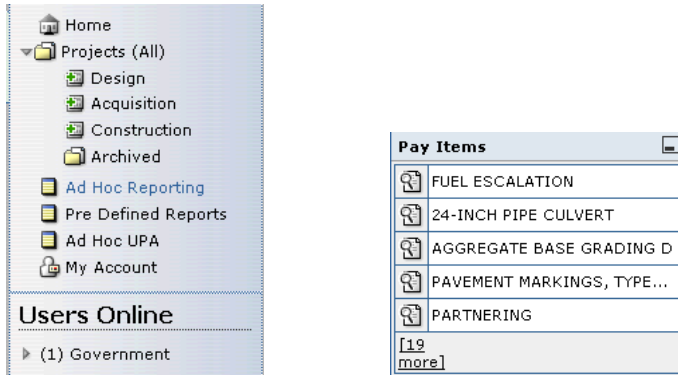
Sidebar links and sub-links, Announcements, and Recent Items listing will vary depending on the user’s assigned program rights.

Navigation away from the home page is accomplished by selecting an item from either the sidebar menu or “Recent Items” list.

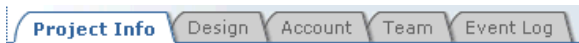
1.5 Navigation

Navigation through the program can be accomplished using:

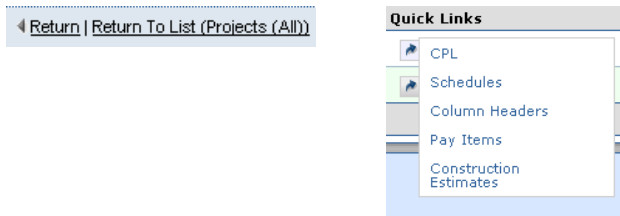
- menus; (sidebar or tables);



- bar tabs;



- hypertext links;



- icon buttons; and



(View/Edit/Copy/Delete)

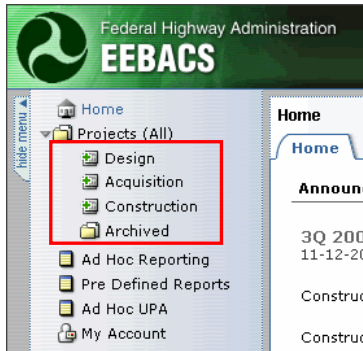
- search filters.

The image shows a 'Search Filters' form with the following fields:

- Keywords:
- Highway Design Manager:
- Complete: yes no
- Designer:
- Project Manager:

There is an 'Apply Search' button at the bottom.

1.6 Projects (All) Directory



The Projects (All) link allows the user to navigate to “All” current projects within the system, projects currently residing in the Design/Acquisition/Construction modules or “Archived” projects.

Users with general inquiries will find the Projects (All) or Archived link most valuable when searching for project information; while Design, Acquisition, and Construction personnel will usually select their respective links to perform tasks for assigned projects.

1.6.1 Project (All)

Selecting “Project (All)” will forward the user to the listing of projects. Before filtering of data takes place, the table will show all projects FLH wide that are currently active.

- The “Search Filter” may be used to show projects by parameters selected. The most commonly used filter is the “Federal Lands Division” pull-down menu which limits viewing of projects to the Division selected (EFLHD, CFLHD, or WFLHD);
- The first column lists icons allowing access to project data. The “View” icon (as shown) allows a user to access the project information, but not make changes to the data;
- Milestones indicate the project’s current point in the process; and
- Status indicates in which module the project is located and which branch is in control of the data.

Wednesday, November 18, 2009 | 6:10 pm | Logout
Users: DLT
powered by symplify

Home
Projects (All)
Design
Acquisition
Construction
Ad Hoc Reporting
Pre Defined Reports
Ad Hoc UPA
My Account

Users Online
(1) Government

Projects (All)

Project

Search Filters:

Keywords: State: [select]

Federal Lands Division: Project Manager:

Status: Highway Design Manager:

Partner Agency: Construction Operation Engineer(COE):

Units:

Apply Search

State	Div.	Project Number	Project Name	FP	Milestone	Status
AR	CFL	PRA HSH 8-1(1)	2nd NEW Test Aug 6 2008	03	15% COST-PER-LENGTH	Design
CO	CFL	PRA JOHN 1(1)	John - Small Test	03	Awarded	Construction
CO	CFL	PRA Julee 100(3)	3rd Test for Julee	03		Construction
CO	CFL	PRA-JULEE 10(1)	acq test julee	03	Awarded	Construction
AL	CFL	QT - 0001	Quick Test 0001	03	Test	Design
CO	CFL	Sar-222Test	Sarah Test 222	03	Milestone_1	Acquisition
AL	CFL	SCR - 001	Symp Check Run - 001	03	MileStone	Acquisition
AL	CFL	SCR - 002	Symp Check Run - 002(Copy)	03	MileStone	Design
AL, KY	CFL	SCR - 003	Symp Check Run - 003(Copy)	03	MileStone	Design
AK	CFL	STest1234	Sarah Test 1234	03	MS_1	Acquisition
AK, AL	CFL	STP - 001	Symp Test Project 001	03	Amendment a001	Acquisition
AL, DC	CFL	STP - 002	Symp Test Project 002	03	50%	Acquisition

1.7 <Reserved>

1.8 <Reserved>

1.9 <Reserved>

1.10 My Account

1.10.1 Changing a Password

A user's password must be changed every **60** days.

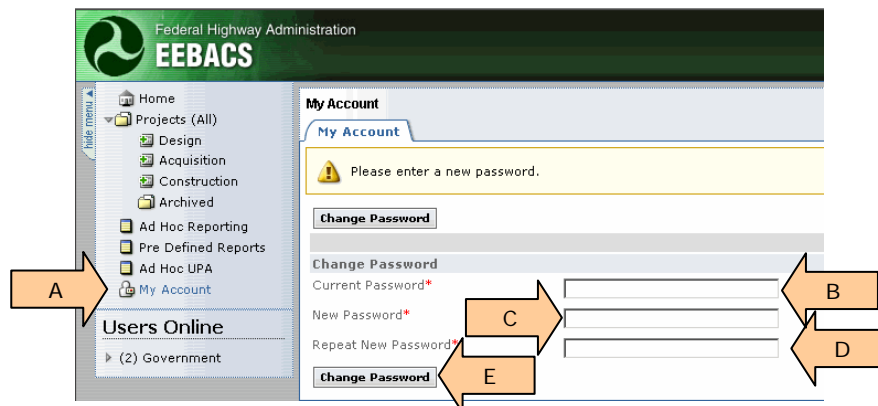
If a user's password has expired, the user will be prompted to reset their password.

The new password cannot be the same as any of the last twelve passwords.

WARNING: If you do not login within 60 days and change your password, your account may be disabled. (After 60 days you will still be allowed to change your password at the prompt; however, you may be unable to access the system with your new password until your account has been reactivated by your local IT Service Desk).

To change a password, if not prompted to, selecting the "My Account" link allows users to change their password.

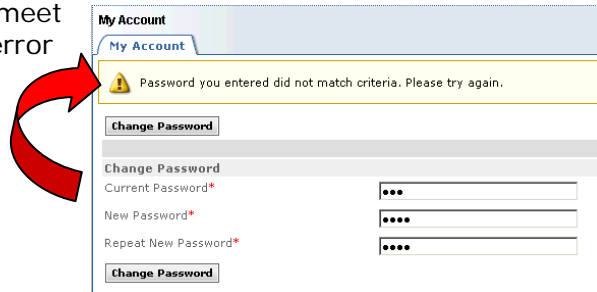
- A. Select "My Account" in the sidebar menu;
- B. Input the password sent (current);
- C. Input a user generated (new) password;
- D. Re-enter the (new) password; and
- E. Select "Change password".



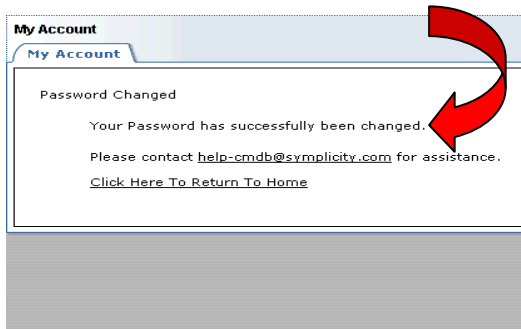
All passwords must conform to the DOT password standards: 12 characters (minimum) length:

- UPPER CASE LETTERS (A through Z);
- Lower case letters (a through z);
- Numbers (0 through 9); and
- Special characters (e.g., !, \$, #, %).

Entering a new password that does not meet standards results in the following error statement:



A successful password change results in the following statement:



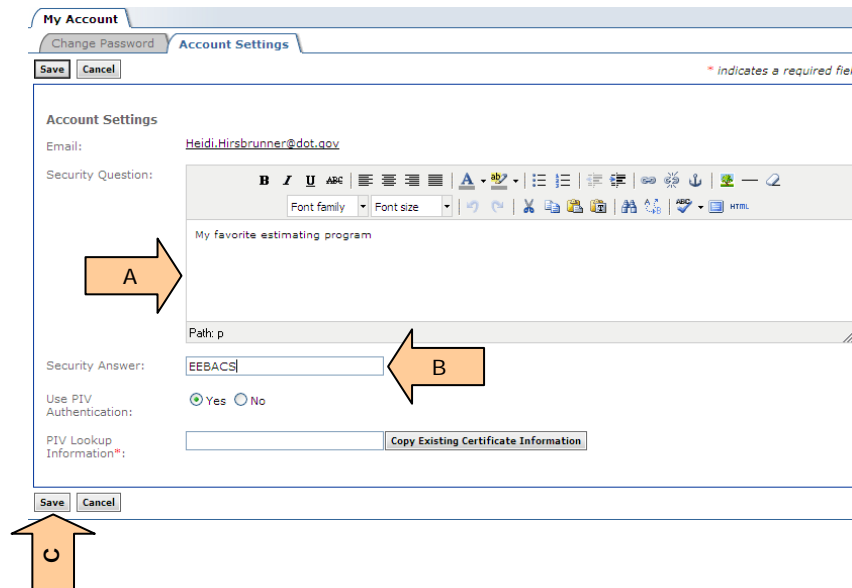
Contact your local IT Service Desk for login or password assistance. (Do not contact Symplicity).

1.10.2 Setting up a Security Question

A security question is needed in case you forget your password and need the System to reset your password and send it to your email address.

Go to the "My Account" link on the sidebar menu; select the "Account Settings" tab.





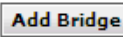




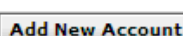
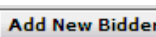

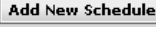

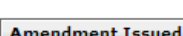
- A. Enter your security question.
- B. Enter the answer to your security question. The security answer is case-sensitive.
- C. Select "Save"


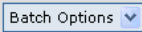






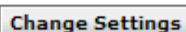

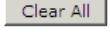
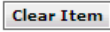


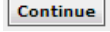


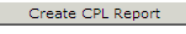





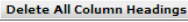





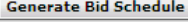
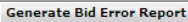
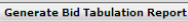
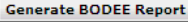
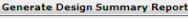
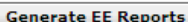
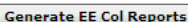
1.11 Terms, Icons, and Abbreviations

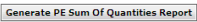
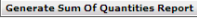
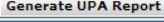


The following terms, icons, and abbreviations are for the entire program. Not all icons are available depending on a user's rights.














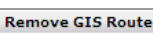

1.11.1 Term and Icon Definitions



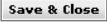
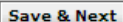
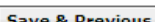



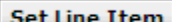

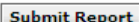
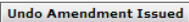


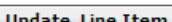


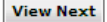
TERM	ICON	DESCRIPTION
A		
Add or Add Another		Adds another pay item, duplicate pay item, pay note, etc. Also symbol for "copy".
Add a pick		Adds additional data field boxes for input.
Add an item below		Adds a new data field
Add Account		Allows addition of another account when an estimated pay item quantity has different funding sources.
Add Bridge		Expands screen to allow input of bridge data.
Add Column Heading		Adds another data input box for quantities and account numbers when a pay item quantity is subdivided into more than one grouping (see Summary of Quantities report).
Add GIS Route		Expands screen to allow for GIS data to be inputted.
Add Master Pay Items		Opens master pay item table to allow selection of pay items.
Add New		Module dependent. Adds new Announcements to the system or new Pre-defined Report. Adds new Bid Summary.
Add New Account		Adds new account number to project.
Add New Bidder		Allows bidder information to be added.
Add New Estimate		Adds a new estimate to a project.
Add New Schedule		Adds a new schedule to the project.
Add Temporary Pay Item		Adds a temporary pay item. Can be used while waiting for a new pay item request to be approved. Projects cannot be forwarded to Acquisitions with temporary pay items included.
Amendment Issued		Marks an amendment as being issued. Data cannot be modified unless "Undo Amendment Issued" is selected.



TERM	ICON	DESCRIPTION
Apply Search		Finds all data within the selected parameters.
Asterisk (red)	*	Indicates a data required in a data field.
B		
Batch Option		Through a pull down list, allows printing of reports, or deletion of selected pay items.
BHUP		When selected allows the Bid History Unit Price screen to be accessed.
C		
Cancel		Closes screen without saving inputted data.
Cancel & Close		Closes a screen or function without saving inputted or calculated data.
Carat		Open/Closes sub-folders, re-orders lists, or items within a pick list.
CBUP		When selected allows the Cost Based Unit Price screen to be accessed.
Change Password		After current and new passwords are entered select this icon to change a user's password when in "My Accounts".
Change Settings		Allows search parameters to be changed.
Clear		When selected, clears all data from fields.
Clear All		Clears all selected data.
Clear Item		Clears all inputted data.
Close		Closes screen or function.
Completed		Project marked completed.
Continue		Advances user to the next screen.
Copy		Copy. Also the symbol for "refresh", "adds", and "adds another" item. Copies an estimate, adds another pay note, or duplicates a pay item. Also the symbol for refresh previously created reports.
Copy Estimate		Copies the estimate to create another estimate within the project.
Create CPL Report		Advances user to next screen for inputting project specific data.
Create Construction Estimate		Calculates the total cost of a schedule once mobilization has been included.

TERM	ICON	DESCRIPTION
D		
Delete		Deletes the adjacent function, deletes most recent entry, or deletes a document.
Delete		Deletes a project, estimate, or schedule. Once this button is selected, the deleted item cannot be restored.
Delete All Column Headings		Deletes all previously established column headings.
Delete report		Deletes a previously generated report.
De-select		De-selects all items visible on the screen.
E		
Edit		When selected, allows function to be edited.
Edit		When selected, opens function or page to be edited. Also see "Write".
F		
G		
Generate		Sends the user to a subroutine to calculate a value or report.
Generate Bid Schedule		Generates a Bid Schedule for the contract package in Adobe Acrobat and MS Word Excel format.
Generate Bid Error Report		Shows any error between inputted and computed bid prices.
Generate Bid Tabulation Report		A tabulation of all bid prices submitted.
Generate BODEE Report		Generates the Bid Opening Disclosure of Engineer's Estimate report for use at Bid Openings.
Generate Design Summary Report		Generates an Adobe Acrobat file summarizing project and schedule information.
Generate EE Reports		Generates an Adobe Acrobat file summarizing project, schedule, and individual item information.
Generate EE Column Reports		Generates an Adobe Acrobat file summarizing project, schedule, and individual item by column information.

TERM	ICON	DESCRIPTION
Generate PE Summary of Quantities Report		Generates a Project Engineer's "Summary of Quantities" in CVS, Excel, and PDF format.
Generate Summary of Quantities Report		Generates a "Summary of Quantities" (as seen in the plans) in CVS, Excel, and PDF format.
Generate UPA Report		Generates Unit Price Analysis Report for selected pay items.
H		
Help		Also is used to show entire list of items in a searchable pick list. Future on-line Frequently Asked Questions.
I		
Import Excel		Places bid data into a MSWord Excel spreadsheet.
J		
K		
L		
M		
Milestone	N/A	<p>A point in the evolution of a project at which a record of that instance is required. Milestones usually coincide with design reviews listed in the Project Development and Design Manual (PDDM) Chapter 9.6.4 Reviews when the project is in Design. Reviews are either descriptive or a percentage. For example: Preliminary Design Review (15% or 30%); Intermediate Design Review (50%); Plan-In-Hand Review (70%); Final PS&E Review (95%); and PS&E Approval & Authorization Review (100%); and Milestones coincide with current Estimate, including any Amendment Estimates in Acquisitions.</p> <p>In Construction the Milestones coincide with status: Awarded, Active, Completed, Disputed, Finaled, terminated</p>

TERM	ICON	DESCRIPTION
Move this item up/down arrows		Moves the item up or down in a listing. Also used to change the order of incentive and duplicate pay items.
N		
Not/No		As in "not" complete or checked "no".
O		
Open in New Window		Opens window with header and data.
P		
PDF		Adobe acrobat file.
Previous runs		Shows all previous runs of a report.
Print Report		Prints report for selected or generated data.
Promote to Acquisition		Sends all project data to Acquisitions upon completion of estimate. Data cannot be retrieved unless released by Acquisitions. Some data can be viewed.
Q		
Quick link		Allows quick access to various functions and pages.
QUP		Automatically adds a new quality incentive pay item and sends user to the Quality Unit Price subroutine.
R		
Refresh		Regenerate reports previously created. Also the symbol for copy, "adds", or "adds another" item. Copies an estimate, adds another pay note, or duplicates a pay item.
Regenerate report		Regenerates a previous report with the latest data in the system.
Regenerate Report		Regenerates a previous report with the latest data in the system.
Remove Bridge		Removes previously inputted bridge data.
Remove GIS Route		Removes previously inputted GIS route data.
Return to Report List		Advances screen to previously generated Ad Hoc Report list.

TERM	ICON	DESCRIPTION
Review latest run		Allows viewing of the last version of a report.
S		
Save		Saves inputted data.
Save & Close		Saves inputted data and closes window.
Save & Next		Saves data on current screen and advances to next pay item.
Save & Previous		Saves data on current screen and advances to next pay item.
Save and go to list		Saves inputted data and goes to pay item list.
Save as Excel		Save data (or place data and open file) into an MSWord Excel spreadsheet.
Select all		Selects all items in the screen.
Set Line Item		Assigns line item numbers to pay items for a given schedule.
Submit		Submits data to generate a report.
Submit Report		Submits selected data to generate a report.
T		
U		
Undo Amendment Issued		Allows an amendment previously issued to be unlocked for manipulation.
Update		Updates data fields.
Update All Line Numbers		When selected, renumbers line item numbers in consecutive order after pay items have been added, deleted, or duplicate pay items reordered.
Update Line Item		Updates line item numbers previously assigned to pay items for a given schedule.
V		
View		Allows user to view the item or project, but does not allow writing or editing. Also icon for "Review latest run".
View all results		Allows entire list of items in a searchable pick list to be shown.
View Next		Allows advancement to next pay item.

TERM	ICON	DESCRIPTION
View Previous		Regresses to last pay item.
W		
Warning		Indicates missing information, information needing updating, or possible error. Also warns user a new report has been generated.

1.11.2 Abbreviations

A

A+B – Found on the bid schedule. In Part “A” the contractor shows their bid price for the bid items. In part “B”, the Contractor shows the number of days they propose for performing the work.

AL – State of Alabama

AK – State of Alaska

AR – State of Arkansas

Avg – Average

AZ – State of Arizona

B

BIA – Bureau of Indian Affairs

BHUP – Bid history unit price

BLS - Bureau of Labor Statistics

BODEE - Bid Opening Disclosure of Engineer’s Estimate

C

CA – State of California

CBUP – Cost-based unit price

CCI – Construction cost indexing

CE – Construction Engineering

CEA -

CFL – Central Federal Lands Highway Division

CO – State of Colorado

COE – Construction Operations Engineer

Col - Column

Comp – Completed
CON - Construction
CPL – Cost Per Length
CPM – Critical Path Method
CT – State of Connecticut
CTSM – Contingent sum
cuft – cubic foot
Cur – Current (as in status of estimate)
cuyd – cubic yard

D

DC – District of Columbia
DE – State of Delaware
DI – Design Incentive
DOD – Department of Defense
DOT – Department of Transportation (Federal or State)

E

EE – Engineer's Estimate
EEBACS – Engineer's Estimate, Bidding, Award, and Construction system
EFL – Eastern Federal Lands Highway Division

F

FL – State of Florida
FLMA – Federal Land Management Agency
FM – Federated States of Micronesia
FP – Federal Project (as in FP-## or the Standard Specifications for Construction of Roads and Bridges of Federal Highway Projects)
FWS – Fish & Wildlife Service

G

GA – State of Georgia
Gal - gallon
GIS – Geographic Information System
GU - Guam

H

ha – hectare (10,000 m²)

HI – State of Hawaii
HD – Highway Division (as in CFL, EFL, or WFL)
HDM – Highway Design Manager
hr - hour

I

IA – State of Iowa
ID – State of Idaho
IGE – Independent Government Estimate
IL – State of Illinois
IN – State of Indiana

J

K

kg - Kilogram
km – Kilometer (1,000 meters)
KS – State of Kansas
KY – State of Kentucky

L

l – Liter
L – Level, AASHTO terrain type
LA – State of Louisiana
Lat - Latitude
lb – pound
Inft – linear foot
Long - Longitude
LPSM – Lump sum

M

m – Meter
M – Mountainous, AASHTO terrain type
m² – square meter
m³ – cubic meter
MA – State of Massachusetts

Mat - Material
Max - Maximum
MD – State of Maryland
ME – State of Maine
MFBM – thousand board feet (lumber)
MGAL – thousand gallons
Mgr - Manager
MH – Marshall Islands
MI – State of Michigan
Min - Minimum
MN – State of Minnesota
MP – North Mariana Islands
MO – State of Missouri, or
MO - Month
MS – State of Mississippi
MT – State of Montana

N

N – Normal pay item type
NC – State of North Carolina
ND – State of North Dakota
NE – State of Nebraska
ND – State of North Dakota
NH – State of New Hampshire
NJ – State of New Jersey
NM – State of New Mexico
NM – Normal pay item with materials incentive
No – Number
NPS – National Park Service
NR – Normal pay item with roughness incentive (IRI)
NS – Normal pay item with smoothness incentive (PRI)
NV – State of Nevada
NY – State of New York

O

O&P – Overhead & Profit

OH – State of Ohio

OK – State of Oklahoma

OR – State of Oregon

P

PA – State of Pennsylvania

PDF – Portable Document Format (Adobe Acrobat file)

PE – Project Engineer or Project Engineering

PFH – Public Forest Highway

PLH – Public Lands Highway

PM – Project Manager

PR – Puerto Rico

PRA – Public Roads Allocated

PW - Palau

Q

Q_ - Quality incentive (M = Materials, R = International Roughness Index (IRI),
S = Smoothness (PRI))

QUP – Quality unit price

R

R – Rolling, AASHTO terrain type

RI – State of Rhode Island

RRP – Refuge Road Program

S

SC – State of South Carolina

Sched – Bid Schedule

SD – State of South Dakota

SLRY – slurry unit

sqft – Square feet (foot)

sqyd – Square yard

STA – Station (100 feet)

Sum - Summary

T

t – metric ton (1000 kilograms)

TN – State of Tennessee

TX – State of Texas

U

UPA – Unit Price Analysis

US – United States

USC – U.S. Customary

USFS – United States Forest Service

UT – State of Utah

V

VA – State of Virginia

VI – Virgin Islands

VT – State of Vermont

W

WA – State of Washington

WFL – Western Federal Lands Highway Division

WI – State of Wisconsin

WV – State of West Virginia

WY – State of Wyoming

X

Y

Z

1.12 Requesting Assistance

For Contractor Employees working off-site – Contact the Contracting Officer's Technical Representative (COTR). They will submit your request or recommendation to the appropriate Local IT Service Desk, Component Lead, or EEBACS Division Administrator.



Chapter 2 - <Reserved>

Chapter 3 - <Reserved>

Chapter 4 - Construction Module

TABLE OF CONTENTS	Page
4.0.1 Preface	4-3
4.0.2 < Reserved >	4-3
4.0.3 Navigation	4-3
4.0.3.1 Home page navigation	4-3
4.0.3.2 Side bar navigation	4-3
4.0.3.3 Construction list navigation	4-4
4.0.3.4 Project tab navigation.....	4-5
4.0.3.5 Return to last screen or list navigation.....	4-5
4.0.3.6 Within project navigation	4-6
4.1 Project Info.....	4-7
4.2 <Reserved>.....	4-8
4.3 <Reserved>.....	4-8
4.4 <Reserved>.....	4-8
4.5 Team	4-9
4.6 Construction	4-10
4.6.1 Core.....	4-10
4.6.1.1 Initial core after Contract Award	4-11
4.6.3 Progress Payment	4-12
4.6.3.1 Review Zero Progress Payment	4-13
4.6.3.2 Add, View, Edit Progress Payment	4-14
4.6.3.3 Grand Summary	4-15
4.6.3.4 Pay Notes.....	4-17
4.6.3.4.1 Add Pay Note	4-18
4.6.3.4.2 Edit and Approve Pay Notes or Check Status of Pay Notes (Submitted to PE)	4-21
4.6.3.5 Pay Note Summaries	4-22
4.6.3.5.1 Process Pay Note Summaries	4-22
4.6.3.6 Non CM Pay Items.....	4-26
4.6.3.7 Period.....	4-27
4.6.3.7a Progress Payment Account (subtab).....	4-27
4.6.3.8 <Reserved>	4-28
4.6.3.9 Progress Payment Tracking	4-28
4.6.4 Subcontractors	4-29
4.6.5 Labor/Equipment	4-32

4.6.6 Daily Reports..... 4-35
 4.6.6.2 Add Specific Notes..... 4-40

4.0.1 Preface

The Construction Module provides the capability to:

- Create, track and approve daily reports (both Inspector and Contractor Daily Reports), daily diaries, pay notes, and progress payments for the contractor.
- Generate a detailed description of how the project was constructed, including materials, equipment, and personnel.
- Add and track Contract Modifications
- Add status report updates
- Add and track claims

4.0.2 < Reserved >

4.0.3 Navigation

Navigate to projects using the sidebar menus. User can also access projects that have been recently worked on using the Recent Items list on the Home Page.

4.0.3.1 Home page navigation

Upon logging into the program, the user will encounter the Home tab or page. The home page allows you to navigate by either the sidebar or most recent item visited.

- Select any category on the sidebar; or
- Select from any of the most recent user entries.

The screenshot displays the EEBACS Home page. On the left, a sidebar menu is visible with an arrow labeled 'A' pointing to it. The sidebar includes categories like Home, Projects (All), Design, Acquisition, Construction, Archived, Ad Hoc Reporting, Pre Defined Reports, Ad Hoc UPA, Tools, MasterPayItems, Conversion, Help, My Account, and Users Online. The main content area shows a 'Home' tab, 'Announcements' (with a message that there are none), and a 'Recent Items' list. An arrow labeled 'B' points to the 'Recent Items' list. The 'Recent Items' list includes entries such as 'Daily Report: CDR on 2010-11-10 by Leonard Construction Manager', 'Daily Report: IDR on 2010-11-10 by Fred AInspect', 'Construction: KS PRA PEHI 77(7) Construction test 9/30/10 HSH', 'Pay Note: 1 INS-1:A 0080', 'Daily Report: IDR on 2010-11-10 by Inspect Gov1', 'Project: KS PRA PEHI 77(7) Construction test 9/30/10 HSH', 'Daily Report: IDR on 2010-11-10 by Alex PE', and 'Progress Pay Period: 1 INS'. To the right of the 'Recent Items' list is a calendar for November 2010 and an 'EEBACS Statistics' table.

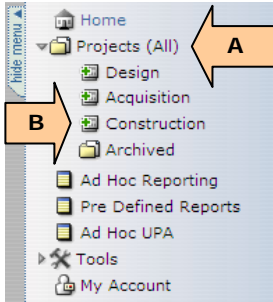
S	M	T	W	T	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

EEBACS Statistics	
User	189
Projects	850
Estimates	1191
Acquisition	798
Bids	2234

4.0.3.2 Side bar navigation

The most commonly used categories on the sidebar are "Projects All" and "Construction". This enables the user to view a listing of all projects within the system or the Construction module.

- A. Select "Projects All" to view a listing of all projects within the system; or
- B. Select "Construction" to view a listing of all projects in the Construction module.



4.0.3.3 Construction list navigation

- A. Allows for filtering of data by the constraints selected;
- B. Previous provides viewing for the previous 20 projects
Next - provides viewing for the next 20 projects
Jump - provides ability to jump to a different page of 20 projects.

Projects are listed in groups of 20 projects, Jump allows the user to "jump" to a new page of 20 projects (setting Jump to 3 would show projects 41-60);

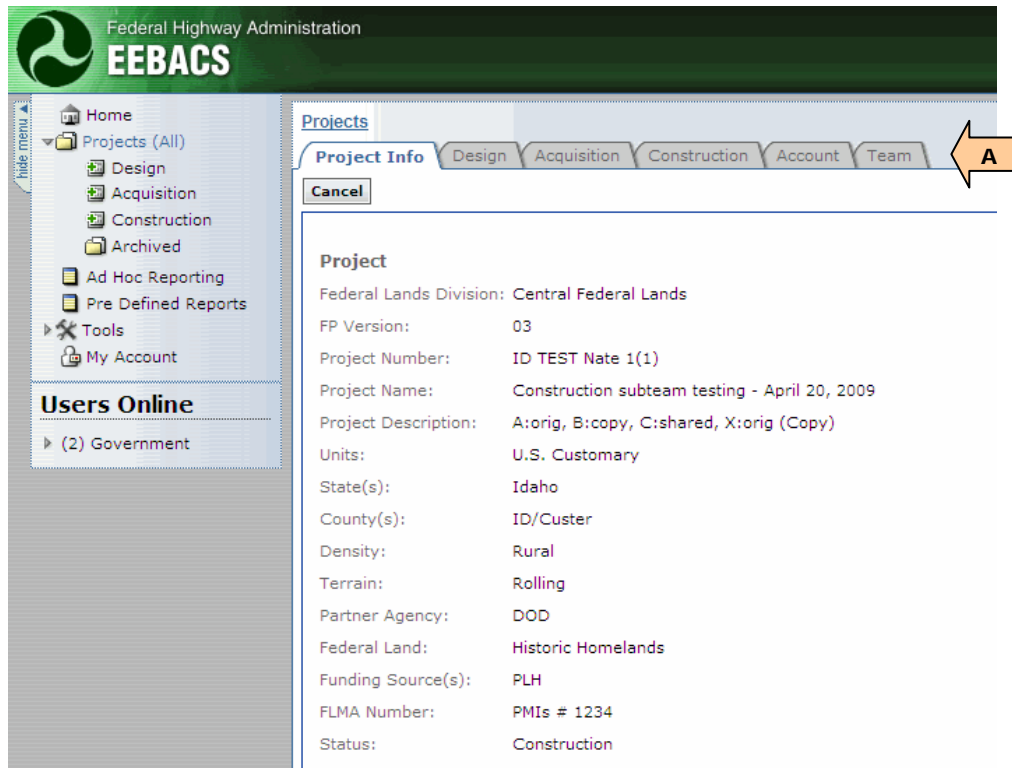
- C. Indicates sequence of projects being viewed and total number of projects meeting the filtered criteria

State	Project Number	Project Name	Contractor	Contract Number	Quick Links
ID	ID TEST Margaret 1 (1)	Construction subteam testing - April 20, 2009	Thing One (Jaim...	dthf70-06b-12345 n/a	
ID	ID TEST Marty 1(1)	Construction subteam testing - April 20, 2009			
ID	ID TEST Nate 1(1)	Construction subteam testing - April 20, 2009	Lego Builders (C...		
ID	ID TEST Randy 1(1)	Construction subteam testing - April 20, 2009	CENTRAL PAVING	DTFH70-99-C-00001	
ID	ID TEST Ryan 1(1)	Construction subteam testing - April 20, 2009	Const Inc (Billy CCinspect)		
KS	KS CFL TEST 10(1)	CFL Construction test 9/30/10	Lego Builders (John CCMange)	DTFH70-10-C-CFLTEST	
KS	KS DAN SPEED 1(1)	DAN Speed tests 1/5/2011		DTFH70-11-C-TEST1	
KS	KS EFL TEST 10(1)	EFL Construction test 9/30/10		DTFH70-10-C-EFLTEST	
KS	KS GREG SPEED 1(1)	Greg Speed tests 1/5/2011	Lego Builders (Clara CCMange)	DTFH70-11-C-TEST2	
KS	KS HAHI 1(2)	Beaver Creek Road	ABC Construction Company (Leonard Construction Manager)	DTFH-XX-10-C-00001	
KS	KS HSH SPEED 1(1)	Heidi Speed tests 1/5/2011	ABC Construction Company (Sam Central CCSManager)	DTFH70-11-C-TEST3	
KS	KS PRA DULO 12(3)	Elk Meadow Road	Thing One (Sarah A. Nelson)	DTFHXX-XX-C-XXXXX	
KS	KS PRA HEHI 10(1)	Leopard Creek	Lego Builders (John CCMange)	DTFH70-10-D-OTEST T-10-001	
KS	KS PRA HEHI 10(100)	Heidi Test Leopard Creek		DFTH 2010-11-HSH	
KS	KS PRA LODU 10(1)	Eagle Highway	Thing One (James Less)	DTFH70-09-C-12345	
KS	KS PRA NWT 15(1)	NEW TEST MARCH 29, 2010	Lego Builders (Clara CCMange)	DTFH70-10-C-ATEST	
KS	KS PRA PEHI 77(7)	Construction test 9/30/10 HSH	ABC Construction Company (Leonard Construction Manager)	DTFH70-11-C-ABCDE	
KS	KS PRA RAEV 10(1)	Coyote Highway	Wendy's General Construction (Wendy Anne Hilgers)	DTFH69-19-C-12333	
KS	KS PRA SAEL 13(1)	Panther Creek (LPSM/CTSM testing)		DTFH70-11-C-TEST1	
KS	KS TEST Jack 1(2)	Construction subteam testing - August 2009	CENTRAL PAVING CO INC (Jim Stevens)	dthf70-09-C-11111	

4.0.3.4 Project tab navigation

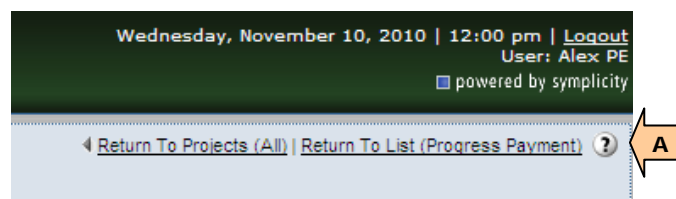
Once a project is selected, access to sub-activities within the module is by tabs.

- A. Tabs and sub-tabs allow access to various functions.



4.0.3.5 Return to last screen or list navigation

- A. Allows return to the recent screen (return) or depending on location the Construction/Project list.

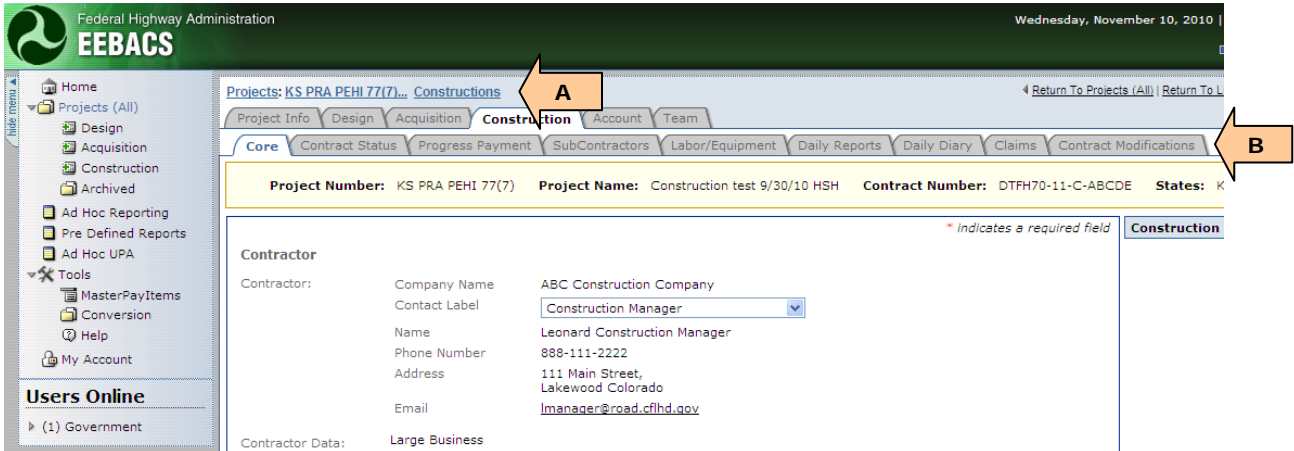


- 💡 Do not use the Internet Explorer "back" button to return to the last screen.

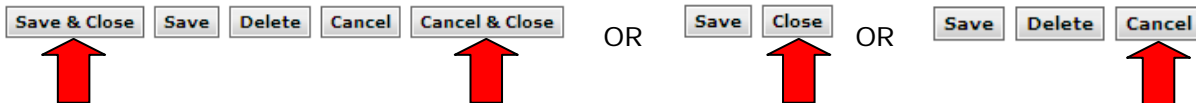
4.0.3.6 Within project navigation

- A. Allows return to selected hyperlink location; and
- B. Navigation can also be accomplished by using tabs. White colored tabs indicate path to active tab and the active tab of the current window.

WARNING: Save data inputs in the current tab before accessing another tab or data may be lost.



- 💡 Not seeing the screen you expect when in a tab? Try selecting the "Close" or "Cancel" icon. EEBACS saves the last sub-screen you viewed when last in the tab.



4.1 Project Info

Project Info | Design | Acquisition | Construction | Account | Team

Project information is descriptive data specific to the project. Project data cannot be edited once project has been transferred from Acquisitions to Construction.

Immediately upon receiving the Project from Acquisitions, verify all the information on the Account Tab, the Construction Core tab, and the Progress Payment 0 - Grand Summary Tab, see Sections 4.4.1, 4.6.1, and 4.6.3.3. **If information is incorrect send back to Acquisitions for correction (Re-Open Acquisition).**

- 💡 If a project has been Re-Opened in Acquisition, the Construction tabs and features will disappear and not be available to users until the project is re-sent to Construction.

The screenshot shows the 'Project Info' tab in a software application. At the top, there are navigation tabs: Project Info, Design, Acquisition, Construction, Account, Team, and Event Log. A yellow warning banner at the top states: 'This project is currently missing the following role(s): Construction Contractor Manager. You can correct this by adding the missing roles on the Team Tab.' Below this banner, there are two buttons: 'Cancel' and 'Re-Open Acquisition', with a red arrow pointing to the latter. The main area displays project details:

Project
 Federal Lands Division: Eastern Federal Lands
 FP Version: 03
 Project Number: KS EFL TEST 10(1)
 Project Name: EFL Construction test 9/30/10
 Project Description: grading, drainage, base, and paving
 Units: U.S. Customary
 State(s): Kansas
 County(s): KS/Bourbon
 Density: Rural
 Terrain: Rolling
 Partner Agency: NPS
 Federal Land: Historic Homelands
 Funding Source(s): PRA
 FLMA Number: PMIS #54352
 Status: Construction

At the bottom of the project details, there are again two buttons: 'Cancel' and 'Re-Open Acquisition', with a red arrow pointing to the latter. On the right side, there are three summary panels:

Project Info
 Created: 09-30-2010 11:57:58
 By: Heidi Hirsbrunner
 Modified: 09-30-2010 11:58:49
 By: Heidi Hirsbrunner

Designs
 100%

Acquisition
 (DTFH70-10-B-EFLTST)
 Acquisition
 Bid Open Date: 10/01/10
 Contract Number: DTFH70-10-C-EFLTST
 Task Order Number:
 Award Date: 10/01/10
 Award Amount: \$15,297,122.50
 Contractor: The Best Construction
 Contractor Business Type: Large Business
 Contractor Address: 7644 30th Court, Kansas City Kansas 78888
 Contractor Phone: 453-898-1288
 Contractor Email: TheBest@company.com

- 💡 The ability to send back to Acquisitions (Re-Open Acquisition button) is no longer available once the first Pay Note summary is added to the first progress payment.
- 💡 If a project is re-opened in Acquisition, the Construction tab and features will not be available to users, until the project is re-sent to Construction.

4.2 <Reserved>

4.3 <Reserved>

4.4 <Reserved>

4.5 Team

Project Info Design Account **Team** Event Log

The team tab allows assignment and archiving of project team members (project roles). In order to add a project team member, they must have a valid, enabled EEBACS account. See Chapter 1 for new user account forms. After being assigned to the project, that team member will have rights associated with their project role. Only project team members are able to create and edit documents or be included on reports.

Roles with right to *assign, edit, delete team members (project roles)*: Component Lead and Construction Admin staff. All other construction roles have view team rights only.

Contractor		
Contractor:	Company Name	Lego Builders
	Contact Label	Superintendent ▼
	Name	John CCMange
	Phone Number	456-856-6546
	Address	123 Pennsylvania Ave, Washington DC District of Columbia 12334
	Email	john.ccmange@road.cfhd.gov
Contractor Data:	Large Business	

4.6 Construction

4.6.1 Core

The core construction tab is a project information page for Construction that shows Contractor, Award, and Project information.

All roles have *view rights of the core tab; except all Construction Contractor roles will not see the Award data.*

4.6.1.1 Initial core after Contract Award

- A. First go to Team Tab to add Team Members, at minimum add: Construction Contractor Manager (if Contractors will be using EEBACS), Project Engineer, and COE. Also add Inspectors and Construction Contract Users. See Section 4.5

WARNING: When selecting the Construction Contractor Manager, ensure the role is assigned to a user from the Prime Contractor. (If a subcontractor user is selected as the Construction Contractor Manager the Company name on the status page will be changed). The Company name and address that appears here, also appears on the Progress Payment Reports, Status Reports. If the Construction Contract Manager changes, ensure that a new Construction Contractor Manager is immediately assigned from the Prime Contractor according to User Account Request Procedures. (The Construction Contractor Manager’s address should always be the **official** Contract Address).

- B. Verify Award data from Acquisitions **if incorrect Send Back to Acquisition** (see Section 4.1);
- C. Project data from Design

Federal Highway Administration
EEBACS

Thursday, July 22, 2010 | 10:30 am | Logout
User: C Adminstaff1
powered by simplicity

Projects: KS HAHI 1(2) Bea... Constructions

Project Info Design Acquisition **Construction** Account Team

Core Contract Status Progress Payment SubContractors Labor/Equipment Daily Reports Daily Diary Claims Contract Modifications

Project Number: KS HAHI 1(2) **Project Name:** Beaver Creek Road **Contract Number:** DTFH-XX-10-C-00001 **States:** KS

Warning: This project is currently missing the following role(s):
Construction Operations Engineer
Project Engineer
Construction Contractor Manager
You can correct this by adding the missing roles on the [Team Tab](#)

Contractor

Contractor: Awarded to: ABC Construction Company
A Contractor user account has not been assigned to this project yet. Please inform your Project Manager or Design Component Administrator.

Contractor Data: Large Business
Solicitation Procedure: Sealed Bid/IFB
Competition Information: Full & Open

Award

Award Date: July 21, 2010
Award Amount: \$20,330,832.72
Incentive Amount: \$916,228.00
Authorized Amount: \$21,247,060.72
Awarded Project Length: 4.321 miles
Date sent to Construction: July 21, 2010
Schedule(s) Awarded: C
Schedule(s) Possibly Awarded Later: X

Project

Construction Operation Engineer(COE):
Project Manager: Dan VanBilder
Project Engineer: A Project Engineer user account has not been assigned to this project yet. Please inform your Project Manager or Design Component Administrator.

Funding Source(s): PRA
Project Description: Grading, drainage, base, and paving
State(s): Kansas
County: KS/Bourbon

Construction Info

Created: 07-21-2010 17:12:16
By: Anqv Lilledahl
Modified: 07-21-2010 17:12:16
By: Anqv Lilledahl

Example with Team Members added:

Federal Highway Administration
EEBACS
 Thursday, July 22, 2010 | 11:31 am | Logout
 User: C Adminstaff1
 powered by simplicity

Projects: KS HAH1 1(2) Bea... Constructions
 Return To Projects (All) | Return To List (Construction)

Project Info Design Acquisition **Construction** Account Team

Core Contract Status Progress Payment SubContractors Labor/Equipment Daily Reports Daily Diary Claims Contract Modifications

Project Number: KS HAH1 1(2) **Project Name:** Beaver Creek Road **Contract Number:** DTFH-XX-10-C-00001 **States:** KS

Contractor * indicates a required field

Contractor:	Company Name	ABC Construction Company
	Name	Leonard Construction Manager
	Address	111 Main Street, Lakewood Colorado
	Email	lmanager@road.cfhd.gov

Contractor Data: Large Business
 Solicitation Procedure: Sealed Bid/IFB
 Competition Information: Full & Open

Award

Award Date: July 21, 2010
 Award Amount: \$20,330,832.72
 Incentive Amount: \$916,228.00
 Authorized Amount: \$21,247,060.72
 Awarded Project Length: 4.321 miles
 Date sent to Construction: July 21, 2010
 Schedule(s) Awarded: C
 Schedule(s) Possibly Awarded Later: X

Project

Construction Operation Engineer(COE): Kim Pellegrini
 Project Manager: Dan VanGilder
 Project Engineer:
 Name: Margaret Moen
 Phone Number: 360-619-7781
 Address: Vancouver Washington
 Email: Margaret.Moen@fhwa.dot.gov

Funding Source(s): PRA
 Project Description: Grading, drainage, base, and paving
 State(s): Kansas
 County: KS/Bourbon

Construction Info	
Created:	07-21-2010 17:12:16
By:	Anqv Lilledahl
Modified:	07-21-2010 17:12:16
By:	Anqv Lilledahl

- 💡 Construction field staff will have home Division office address in EEBACS. If the field staff has a permanently assigned cell phone, it is preferred that the permanently assigned cell phone number be used rather than a project specific phone number.

4.6.3 Progress Payment

Progress Payments is where all tasks related to processing progress payments occurs, including: adding and approving pay notes, processing pay note summaries, adding non-CM pay items, and progress payment tracking and approval.

Each Progress Payment is automatically assigned a pay period number starting from zero. The progress payment number shows on all of the screens and pay documents. It is important to make sure you are in the proper progress payment before taking any action.

4.6.3.1 Review Zero Progress Payment

At the beginning of each project you should review the initial “Zero” progress payment that is developed from the awarded items to verify it is correct and complete. No items are ever paid on the initial pay period. No specific dates are related to the initial pay period.

- A. Select “View” - automatically sends you to Zero Progress Payment’s Grand Summary tab

Projects: KS HAH1 1(2) Bea... Constructions Return To Projects (All) | Return To List (Construction) ?

Project Info | Design | Acquisition | **Construction** | Account | Team | Event Log

Core | Contract Status | **Progress Payment** | SubContractors | Labor/Equipment | Daily Reports | Daily Diary | Claims | Contract Modifications

Project Number: KS HAH1 1(2) **Project Name:** Beaver Creek Road **Contract Number:** DTFH-XX-10-C-00001 **States:** KS

Search Filters:
 Start Date [] [select] [clear] to [] [select] [clear] End Date [] [select] [clear] to [] [select] [clear]
 Payment Type [v]
 [Apply Search]

Actions	Pay Period Number v	Payment Status v	Payment Type v	Start Date v	End Date v	Amount Paid v
[View]	0	Current	Initial	-	-	\$0.00

[Add New] Items 1-1 of 1

- B. Print Progress Payment Report to review pay items, description, quantities, account splits, unit prices for conformance with Contract.

Projects: KS HAH1 1(2) Bea... Constructions: Progress Pay Periods 0 Return To Projects (All) | Return To List (Progress Payment) ?

Project Info | Design | Acquisition | **Construction** | Account | Team | Event Log

Core | Contract Status | **Progress Payment** | SubContractors | Labor/Equipment | Daily Reports | Daily Diary | Claims | Contract Modifications

Grand Summary | Pay Notes | Pay Note Summaries | Non CM Items | Period | Progress Payment Tracking

Project Number: KS HAH1 1(2) **Project Name:** Beaver Creek Road **Contract Number:** DTFH-XX-10-C-00001 **States:** KS

Pay Period Number: 0 Payment Type: Initial

Search Filters:
 Keyword [] Status Draft Pending Processed
 Contract Mods CM001 Part of a Contract Mod yes no
 [Apply Search]

Progress Payment Period Totals
 Contract Amount: \$21,247,037.72 Revised Contract Amount: \$21,247,060.72 Current Amount: \$0.00 Previous Amount: \$0.00 To Date Progress Payment Amounts: \$0.00 Probable Amount: \$21,247,060.72 Percent Work Completed: 0%

Government Recs **Progress Payment Report** | Progress Payment Report (Contractor Version) Items 1-20 of 31 Jump 1 | Next >

Actions	Line # v	Quantity v	Unit Price v	Pay Units v	Amount v	Revised Quantities		Current Quantities			Probable Quantities			O/U % v	
						QTY	Amount	Current	Previous	To Date	Amount	Comp % v	Probable QTY		Probable Amount
Pay Item # v: 15101-0000 CM #: Pay Item Type v: N Description: MOBILIZATION															
	C1000	All	\$2,000,000.00	LPSM	\$2,000,000.00	100%	\$2,000,000.00	0%	0%	0%	\$0.00	0.00	100%	\$2,000,000.00	0.00
Pay Item # v: 15210-4000 CM #: Pay Item Type v: N Description: CENTERLINE, ESTABLISHMENT															
	C1020	8.979	\$8,000.00	STA	\$71,832.00	8.979	\$71,832.00	0.000	0.000	0.000	\$0.00	0.00	8.979	\$71,832.00	0.00
Pay Item # v: 15401-0000 CM #: Pay Item Type v: N Description: CONTRACTOR TESTING															
	C1040	All	\$400,000.00	LPSM	\$400,000.00	100%	\$400,000.00	0%	0%	0%	\$0.00	0.00	100%	\$400,000.00	0.00
Pay Item # v: 15705-0100 CM #: Pay Item Type v: N Description: SOIL EROSION CONTROL, SILT FENCE (Includes...															
	C1060	5,142.3	\$8.00	LNFT	\$41,138.72	5,142.3	\$41,138.72	0.0	0.0	0.0	\$0.00	0.00	5,142.3	\$41,138.72	0.00
Pay Item # v: 15707-1000 CM #: Pay Item Type v: N Description: SOIL EROSION CONTROL, TEMPORARY TURF...															

4.6.3.2 Add, View, Edit Progress Payment

Roles with *create new/delete progress payment* rights include: Construction Component lead, Construction Admin staff, COE (project) and all Project Engineer roles.

- A. Select "Add New" – Adds a new Progress Payment and automatically brings you to the Grand Summary tab for that Project Payment (new progress payment start date automatically begins the day after the close of the previous period)
- B. Select "View" or "Edit" to go to an existing Progress Payment's Grand Summary tab
- C. The status of each Progress Payment can be checked and monitored from the Progress Payment tab. The possible statuses of a payment are:
 - Current – The progress payment is active in the Field. There may be 2 payments in Current status at one time (ex. Finishing last month's and starting this month's)
 - Submitted – The Progress payment has completed initial creation, review, and Field approval and is in the Main office for further editing, review, and final approval.
 - Approved – The progress payment has been approved by the Main office and is awaiting confirmation of the payment to the contractor.
 - Paid - Progress payment has been paid by Finance to the contractor.
- D. Each payment is assigned a type depending on the project completion. The progress payment types are:
 - Initial - Shows items as awarded by contract.
 - Progress – Project is underway and this is an estimated progress payment
 - Semi-final - Project has been completed and project quantities are finalized by the field
 - Final – Project has been checked and reviewed and all quantities and documentation are complete and agreed - this is the Final voucher for the contract.

💡 To edit progress payment Start and End dates, select the Period Tab from the Grand Summary. See Section 4.6.3.7

Project Number: KS PRA HEHI 10(1) Project Name: Leopard Creek Contract Number: DTFH70-10-D-0TEST T-10-001 States: KS

Search Filters:
 Start Date to End Date to
 Payment Type

Actions	Pay Period Number	Payment Status	Payment Type	Start Date	End Date	Amount Paid
	0	Approved	Initial	-	-	\$0.00
	1	Paid	Progress	Jun 11, 2010	Jul 11, 2010	\$114,600.00
	2	Paid	Progress	Jul 12, 2010	Aug 11, 2010	\$7,500.00
	3	Current	Progress	Aug 12, 2010	Sep 11, 2010	\$0.00

Add New Items 1-4 of 4

4.6.3.3 Grand Summary

This is the main tab (or jump-off point) for developing a progress payment. The left column has symbols which either initiates an action and/or represents status of pay notes/pay note summaries, as described below.

Projects: KS HAHI 1(2) Bea... Constructions: Progress Pay Periods 1 INS Return To Projects (All) Return To List (Progress Payment) ?

Project Info Design Acquisition Construction Account Team Event Log

Core Contract Status Progress Payment SubContractors Labor/Equipment Daily Reports Daily Diary Claims Contract Modifications

Grand Summary Pay Notes Pay Note Summaries Non CM Pay Items Period Progress Payment Tracking

Project Number: KS HAHI 1(2) **Project Name:** Beaver Creek Road **Contract Number:** DTFH-XX-10-C-00001 **States:** KS

Pay Period Number: 1 Payment Type: Initial
 Start Date: August 2, 2010 End Date: September 1, 2010

Search Filters:
 Keyword: Status: Draft Pending Processed
 Contract Mods: Part of a Contract Mod yes no




Progress Payment Period Totals

Contract Amount: \$21,247,060.72	Revised Contract Amount: \$21,247,060.72	Current Amount: \$0.00	Previous Amount: \$0.00	To Date Progress Payment Amounts: \$0.00	Probable Amount: \$21,247,060.72	Percent Work Completed: 0 %
----------------------------------	--	------------------------	-------------------------	--	----------------------------------	-----------------------------


Government Receiving Report Progress Payment Report Progress Payment Report (Contractor Version) Items 1-20 of 31 Jump 1 | Next >


Line #	Contract Quantities				Revised Quantities		Current Quantities			Probable Quantities		O/U %			
	Quantity	Unit Price	Pay Units	Amount	QTY	Amount	Current	Previous	To Date	Amount	Comp %		Probable QTY	Probable Amount	
Pay Item # v: 15101-0000 CM #: Pay Item Type v: N Description: MOBILIZATION															
	C1000	All	\$2,000,000.00	LPSM	\$2,000,000.00	100%	\$2,000,000.00	0%	0%	0%	\$0.00	0.00	100%	\$2,000,000.00	0.00
Pay Item # v: 15210-4000 CM #: Pay Item Type v: N Description: CENTERLINE, ESTABLISHMENT															
	C1020	8.979	\$8,000.00	STA	\$71,832.00	8.979	\$71,832.00	0.000	0.000	0.000	\$0.00	0.00	8.979	\$71,832.00	0.00
Pay Item # v: 15401-0000 CM #: Pay Item Type v: N Description: CONTRACTOR TESTING															
	C1040	All	\$400,000.00	LPSM	\$400,000.00	100%	\$400,000.00	0%	0%	0%	\$0.00	0.00	100%	\$400,000.00	0.00
Pay Item # v: 15705-0100 CM #: Pay Item Type v: N Description: SOIL EROSION CONTROL, SILT FENCE (Includes...															
	C1060	5,142.3	\$8.00	LNFT	\$41,138.72	5,142.3	\$41,138.72	0.0	0.0	0.0	\$0.00	0.00	5,142.3	\$41,138.72	0.00
Pay Item # v: 15707-1000 CM #: Pay Item Type v: N Description: SOIL EROSION CONTROL, TEMPORARY TURF...															
	C1080	140.0	\$500.00	SLRY	\$70,000.00	140.0	\$70,000.00	0.0	0.0	0.0	\$0.00	0.00	140.0	\$70,000.00	0.00

Icons in left-most column of the Grand Summary, shown for each pay item:



- “Add new pay note” (this symbol will not appear in the zero progress payment period); 
- “Edit pay note” This includes editing, submitting, approving, and rejecting pay notes; 
- (#) – shows the number of existing pay notes, if more than one 



The Circles shown on the left side are all icons that will take you to the Pay Note Summary for that specific pay item as well as show you the status of the pay item. The White circle will ‘fill in’ and change colors as the Pay Notes and Pay Note Summary move through the process for the particular progress payment period shown.



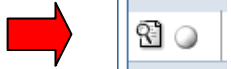

- White circle (empty circle): 
 - No active pay notes or retent exist
 - Pressing the white circle sends you to the Pay Note Summary where you can edit probables.

- Orange/brown circle (1/3 filled circle): 
 - Pay notes exist (pay notes may be draft, pending review, rejected, or approved)

Note: To edit, submit to PE, or approve pay notes use "edit icon" (or go to the Pay Notes tab)
 - Pressing the orange/brown circle sends you to the Pay Note Summary where you can edit probables, enter item comments, and view limited pay note information to-date (pay notes may be draft, pending review, or approved).

 Instead of pressing the circle, the user can go to Pay Note Summary Tab and select pay item.
- Green circle (2/3 filled circle): 
 - All pay notes have been approved, the Pay Note Summary is ready to be processed and added to payment
 - Pressing the green circle sends you to the Pay Note Summary where you can edit probables, enter item comments, and view limited pay note information (all pay notes are approved). Now you finally have the ability to enter "retent" and then "Add to Payment."

 Instead of pressing the circle, the user can go to Pay Note Summary Tab and select pay item.
- Blue circle (completely filled circle): 
 - All pay notes are now finalized and the Pay Note Summary has been processed and added to payment
 - Pressing the blue circle sends you to the Pay Note Summary where you can "Remove from Payment" in case you need to add more pay notes or edit the pay note summary.

 Instead of pressing the circle, the user can go to Pay Note Summary Tab and select pay item.
- "View Pay Note(s)": 
 - This is the icon combination after the progress payment has been sent to the Office. The Pay Note Summary is no longer active for the period. Pay Notes and Pay Note Summary can no longer be edited in the Field. 
 - This is the icon combination in the new progress payment period if Retent was withheld on the pay item in the previous payment period – Notice that no pay note is present for the current pay period, but there is information to be processed on the Pay Note Summary for the current payment period. 

- A. Contract Amount. Includes all original Bid Items and Incentives (such as quality incentives, partnering, asphalt escalation, etc.) at award.
- B. Revised Contract Amount: Contract Amount + pay items added/deleted/modified with a signed Contract Modification. (Revised Contract Amount does NOT include added non-CM pay items).
- C. Current Amount – Current Progress Payment Period includes all approved Pay Note Summaries
- D. Previous Amount – Total of all previously approved progress payments
- E. To-date Progress Payment: Current Amount + Previous Amount
- F. Probable Amount. Total Probable for all pay items, including original contract bid items and original contract incentives, added non-CM pay items, and all pay items added/deleted/modified with a signed Contract Modification
- G. Percent work completed. The percent work completed does not include the retained quantities.

Projects: KS HAHI 1(2) Bea... Constructions: Progress Pay Periods 1 INS Return To Projects (All) Return To List (Progress Payment) ?

Project Info Design Acquisition Construction Account Team Event Log

Core Contract Status **Progress Payment** SubContractors Labor/Equipment Daily Reports Daily Diary Claims Contract Modifications

Grand Summary Pay Notes Pay Note Summaries Non CM Pay Items Period Progress Payment Tracking

Project Number: KS HAHI 1(2) Project Name: Beaver Creek Road Contract Number: DTFH-XX-10-C-00001 States: KS

Pay Period Number: 1 Payment Type: Initial
Start Date: August 2, 2010 End Date: September 1, 2010

Search Filters:
Keyword: Status: Draft Pending Processed
Contract Modification: Part of a Contract Modification no

Apply Search

Progress Payment Period Totals

Contract Amount:	Revised Contract Amount:	Current Amount:	Previous Amount:	To Date Progress Payment Amounts:	Probable Amount:	Percent Work Completed:
\$21,247,060.72	\$21,247,060.72	\$0.00	\$0.00	\$0.00	\$21,247,060.72	0 %

Government Receiving Report Progress Payment Report Progress Payment Report (Contractor Version) Items 1-20 of 31 Jump 1 | Next >

Line #	Quantity	Unit Price	Pay Units	Amount	Contract Quantities		Revised Quantities		Current Quantities			Probable Quantities		O/U %	
					QTY	Amount	Current	Previous	To Date	Amount	Comp %	Probable QTY	Probable Amount		
Pay Item # v: 15101-0000 CM #: Pay Item Type v: N Description: MOBILIZATION															
C1000	All	\$2,000,000.00	LPSM	\$2,000,000.00	100%	\$2,000,000.00	0%	0%	0%	\$0.00	0.00	100%	\$2,000,000.00	0.00	
Pay Item # v: 15210-4000 CM #: Pay Item Type v: N Description: CENTERLINE, ESTABLISHMENT															
C1020	8.979	\$8,000.00	STA	\$71,832.00	8.979	\$71,832.00	0.000	0.000	0.000	\$0.00	0.00	8.979	\$71,832.00	0.00	
Pay Item # v: 15401-0000 CM #: Pay Item Type v: N Description: CONTRACTOR TESTING															
C1040	All	\$400,000.00	LPSM	\$400,000.00	100%	\$400,000.00	0%	0%	0%	\$0.00	0.00	100%	\$400,000.00	0.00	
Pay Item # v: 15705-0100 CM #: Pay Item Type v: N Description: SOIL EROSION CONTROL, SILT FENCE (Includes...															
C1060	5,142.3	\$8.00	LNFT	\$41,138.72	5,142.3	\$41,138.72	0.0	0.0	0.0	\$0.00	0.00	5,142.3	\$41,138.72	0.00	
Pay Item # v: 15707-1000 CM #: Pay Item Type v: N Description: SOIL EROSION CONTROL, TEMPORARY TURF...															
C1080	140.0	\$500.00	SLRY	\$70,000.00	140.0	\$70,000.00	0.0	0.0	0.0	\$0.00	0.00	140.0	\$70,000.00	0.00	

4.6.3.4 Pay Notes

This section allows the users to add, edit, and approve pay notes.

Roles with *create/edit pay note* rights: Component Lead, Construction Admin Staff, Construction Contractor roles (project), COE (project), all Inspector, PE's and Assistant PE roles (project). Most users can only edit their own pay notes. PE roles, the Component Lead, and the Construction Admin staff roles can edit other users' pay notes.

Roles with ability to *approve, reject, and assign as info only pay notes*: Construction Component Lead, Construction Admin Staff, PE/Assistant PE roles (project).

4.6.3.4.1 Add Pay Note

Select icon to add new pay note. (Pay notes can only be added from the Grand Summary. Pay notes cannot be added from the pay note tab). If you have multiple progress payments in current status, check to be sure you are in the correct progress payment period before adding a pay note. Pay notes cannot be moved between periods.



The system will automatically generate a new pay note with the pay item's basic information.

- A. Input Pay Note date
- B. Select Work date start date
- C. Select Work date end date
- D. Enter Location/description – describe where the work was done and what was done
- E. Input pay quantities by account – input entire measured quantity. The retent and partial payment calculations will be made separately. See Sections 4.6.3.4.2 and 4.6.3.5.
- F. Enter Remarks/Calculations – input any calculations or remarks related to measurement and payment. If the person(s) actually measuring in the field is not selected in the Measured by box (see next screen shot), enter the actual name(s) here.

Project Info Design Acquisition Construction Account Team Event Log

Core Contract Status Progress Payment SubContractors Labor/Equipment Daily Reports Daily Diary Claims Contract Modifications

Grand Summary Pay Notes Pay Note Summaries Non CM Pay Items Period Progress Payment Tracking

Project Number: KSHAH1 1(2) Project Name: Beaver Creek Road Contract Number: DTFH-XX-10-C-00001 States: KS

Save & Close Save Delete Cancel Cancel & Close Submit To PE Print Preview Print Preview (Contractor Version) * indicates a required field

FHWA Pay Note

Pay Note: 10 INS Pay Item Number: 30105-0000 Line Number: C 1200
 Period: 2 INS Pay Item Type: Normal pay item, may need material incentive Contract Mod #:
 Description: SUBBASE

Acct	Contract Quantities			Revised Quantities		Probables		% Over/Under
	Quantity	Unit Price	Unit	Qty	Amount	Quantity	Amount	
	5,500.0	\$145.00	TON	5,500.0	\$797,500.00	5,500.0	\$797,500.00	0.00
CON01	5,500.0	\$145.00	TON	5,500.0	\$797,500.00	5,500.0	\$797,500.00	0.00

Pay Note Date*: 08-20-2010 select clear

Entries:

Pay Note Entry #1

Work Date Start Date*: 08-19-2010 select clear

Work Date End Date*: 08-19-2010 select clear

Location/Description*:
 Placed subbase at entrance station. Approx sta 10+00.

CON01 PLH Funding Quantity:
 153 TON

Remarks/Calculations:

- G. Select "Add Entry" when you need to add a new pay note entry
- H. Enter Total production days – the number of days it took to complete the work
- I. Select Measured By – The person responsible for the measurement (in the case of contractor measured by, it may not be the person measuring in the field). If the person actually measuring in the field is not selected here, enter the actual name in the Remarks/Calculation narrative box (see "F" previous page)
- J. Select FHWA Inspector, if applicable – May include A/E staff inspectors (C.I.'s)
- K. Select Contractor Inspector, if applicable– This is the Construction Contractor Inspector
- L. Toggle Interim or Final
- M. Select "Add Document" to add any pertinent documents to this pay note
- N. Enter Reference – If there are hardcopy files, describe document location.
- O. Print Preview – generates a PDF version of FHWA Pay Note with Probables
- P. Print Preview (Contractor Version) – generates a PDF version of FHWA Pay Note without probables
- Q. Select "Submit to PE" when pay note is completed

The screenshot shows a web-based form for entering a pay note. The form includes the following fields and buttons:

- CON01 PLH Funding Quantity:** 153.0
- Total Pay Note Quantity:** 153.0 TON
- Total Production Days:** 2 (with callout H)
- Production Rate:** 76.5 TON/Day
- Measured By*:** Leonard Construction Manage (with callout I)
- FHWA Inspector:** Kim Pellegrini (with callout J)
- Contractor Inspector:** Leonard Construction Manage (with callout K)
- Interim/Final*:** Interim (with callout L)
- Supporting Documentation:** Add Document (with callout M)
- Reference:** (with callout N)

At the bottom of the form, there are several buttons: Save & Close, Save, Delete, Cancel, Cancel & Close, Submit To PE (with callout O), Print Preview (with callout O), and Print Preview (Contractor Version) (with callout P). The "Add Entry" button at the top left is pointed to by callout G.

💡 As soon as a pay note has been added, the Grand Summary circle becomes orange/brown (1/3 filled circle). Pay notes may be draft, pending review, or approved.

For Inspectors (both FHWA and Contractors), select "Submit to PE" when pay note is completed.

Warning: Once a Pay Note has been Submitted to the PE, it can NOT be deleted from the system. If a pay note is in error, the PE must either reject the pay note for it to be corrected and resubmitted OR the PE must approve it and mark it form information only. See Section 4.6.3.4.2.

Core Contract Status **Progress Payment** SubContractors Labor/Equipment Daily Reports Daily Diary Claims Contract Modifications

Grand Summary **Pay Notes** Pay Note Summaries Non CM Pay Items Period Progress Payment Tracking

Project Number: KS HAHI 1(2) **Project Name:** Beaver Creek Road **Contract Number:** DTFH-XX-10-C-00001 **States:** KS

Save & Close Save Delete Cancel Cancel & Close **Submit To PE** Print Preview Print Preview (Contractor Version) * indicates a required field

FHWA Pay Note

Pay Note: 8 INS **Pay Item Number:** 25125-0000 **Line Number:** C 1160
Period: 2 INS **Pay Item Type:** Normal pay item **Contract Mod #:**
Description: BOULDER

Acct	Contract Quantities				Revised Quantities		Probables		% Over / Under
	Quantity	Unit Price	Unit	Amount	Qty	Amount	Quantity	Amount	
	860	\$50.00	EACH	\$43,000.00	860	\$43,000.00	800	\$40,000.00	-6.98
CON01	567	\$50.00	EACH	\$28,350.00	567	\$28,350.00	500	\$25,000.00	-11.82
CON02	293	\$50.00	EACH	\$14,650.00	293	\$14,650.00	300	\$15,000.00	2.39

Pay Note Date*: 08-24-2010

Entries:

Pay Note Entry #1

Work Date Start Date*:

Work Date End Date*:

Location/Description*:

The following certification appears:

I hereby certify that the measurements and calculations shown above are correct to the best of my knowledge and that the quantity being measured is subject to direct payment for the identified item under contract.

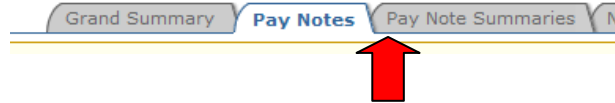
4.6.3.4.2 Edit and Approve Pay Notes or Check Status of Pay Notes (Submitted to PE)

To access previously created pay notes for a specific item, regardless of pay note status:

Either select edit icon



Or select Pay Notes tab



Do NOT use the circle icons to access individual pay note – these icon access the pay note summaries



A. Select “edit icon” to edit pay note, submit pay note to PE, or to approve pay note.

B. Pay Note Status

- Draft – Pay note has not yet been submitted to PE (and may still be deleted)
- Pending review – Pay note has been submitted to PE, but not yet reviewed by PE
- Approved – Pay note has been approved by PE
- Rejected – Pay note has been rejected by PE
- Finalized – Pay note summary (which includes this approved pay note) has been finalized

💡 To quickly find pay notes, use filters as appropriate

Project Number: KS HAHI 1(2) Project Name: Beaver Creek Road Contract Number: DTFH-XX-10-C-00001 States: KS

Search Filters:

Line Number: [dropdown]
 Pay Item Number: [dropdown]
 Pay Item Type: [dropdown]
 Pay Note Date: [select] [clear] to [select] [clear]

FHWA Inspector: [dropdown]
 Contractor Inspector: [dropdown]
 Status: Draft Pending Review Approved Rejected Finalized
 Show This Period Show All Periods

Apply Search Clear

Actions	Pay Note	Line Number	Pay Item #	Pay Item Type	Description	Pay Note Date	Contractor Inspector	FWHA Inspector	Status
	3	C 1160	25125-0000	N	BOULDER	Aug 05, 2010	Leonard Construction Manager	Kim Pellegrini	Pending Review
	4	C 1160	25125-0000	N	BOULDER	Aug 05, 2010	Leonard Construction Manager	Kim Pellegrini	Approved
	5	C 1020	15210-4000	N	CENTERLINE,...	Aug 10, 2010	Leonard Construction Manager	Kim Pellegrini	Finalized
	6	C 1140	21101-1000	N	ROADWAY OBLITERATION,...	-			Draft

Items 1-4 of 4

A B

Warning: Once a Pay Note has been Submitted to the PE (status “pending review”), it can NOT be deleted from the system (because it is a legally signed document).

If a pay note is in error, the PE must either reject the pay note for it to be corrected and resubmitted OR the PE must approve it and mark it form information only.

Pay notes must be reviewed and processed by FHWA. Only approved pay notes will become part of the payment to the contractor. The PE reviews and approves the pay notes, including, proper pay item, date, location, calculations, any attached documents, and to verify that quantities and documentation are acceptable and are approved for payment.

The PE has the following options for a pay note that is pending review:

- Reject the pay note – this returns pay note back to the submitter
- Approve the pay note – this adds the pay note quantity to the pay note summary for payment processing
- Edit pay note – it is FLH best practice for the PE not to edit pay note submitted by others, but to reject the pay note for correction by the original submitter. It is recognized that in some instances the PE may need to edit pay note for expediency/efficiency in order to meet payment deadlines. When editing pay notes, the PE should clearly document in the Review notes the changes that were made
- Mark single entries or entire pay note “For information Only”. Entries or pay notes marked “For information Only” will not be included for payment. (Will be labeled as I/O on Pay Note Summary). After being marked, the pay note can then be approved.

- 💡 Pay notes marked as “For Information Only” will not be included the production rate calculations. Total Production Days may need to be edited to reflect the smaller quantity.

4.6.3.5 Pay Note Summaries

The Pay Note Summary is where probables can be updated, retent added, and where the PE finalizes individual pay items for payment and add the summary to progress payment period. A Pay Note Summary can be temporarily removed (pulled back) from payment to be re-opened for editing.

The Pay Note Summary is also where you can access a list and view all the Pay Notes for the individual pay item for the current period and for all periods.

Roles with the right *Process and Pullback Pay Note Summary*: Construction Component Lead, Construction Admin Staff, COE (project), Project Engineers/Assistant Project (project).

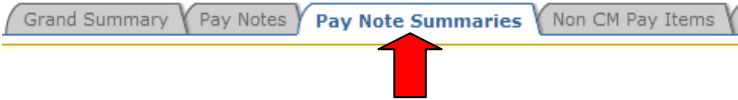
4.6.3.5.1 Process Pay Note Summaries

A green circle for the final processing of the pay note summary will not appear until all pay notes for that pay item have been approved. However the payment remarks, probables, and probables remarks on the Pay Note Summary may be edited prior to all pay notes being approved.

Either from the Grand Summary select green circle (2/3 filled circle)



Or select Pay Note Summaries tab



If Pay Note Summary is accessed through the Pay Note Summary tab, select pay item for which you want process the Pay Note Summary.

A. Status:

- Draft – some pay notes have not yet been approved
- Pending – all pay notes have been approved, but pay note summary has not been added to payment
- Processed – Pay note summary has been added to payment

Project Number: KS HAH1 1(2) Project Name: Beaver Creek Road Contract Number: DTFH-XX-10-C-00001 States: KS

Search Filters:
 Item Number:
 Status: Draft Pending Processed
 Show This Period Show All Periods

Actions	Line #	Pay Item #	Pay Item Type	Description	Unit Price	U.S. Pay Units	Current	To Date	Amount	Comp %	Status
	C1020	15210-4000	N	CENTERLINE,...	\$8,000.00	STA	33.000	39.000	\$312,000.00	100.00	Processed
	C1140	21101-1000	N	ROADWAY OBLITERATION,...	\$4.50	SQYD	0	0	\$0.00	0.00	Draft
	C1160	25125-0000	N	BOULDER	\$50.00	EACH	0	0	\$0.00	0.00	Draft
	C1200	30105-0000	NM	SUBBASE	\$16.00	TON	0.0	0.0	\$0.00	0.00	Draft
	C1240	40101-1000	NR	SUPERPAVE PAVEMENT,...	\$144.00	TON	0.0	0.0	\$0.00	0.00	Draft

- A. Enter Payment Remarks – The remarks can be general or progress pay period specific. These remarks remain visible for all periods, unless removed and appear on both the FHWA and Contractor Reports.
- B. Press Link to show Full Pay Note Summary, includes all previous and current progress payment period pay notes for this pay item
- C. Press Link(s) to show current period pay note details

Project Number: KS PRA HEHI 10(1) Project Name: Leopard Creek Contract Number: DTFH70-10-D-0TEST T-10-001 States:

Save Close Add To Payment Print Preview Print Preview (Contractor Version) * indicates a required field

Pay Item Number: 25125-0000 Line Number: C 1160 Period: 4 INS Pay Item Type: N
Description: BOULDER

Payment Remarks:

Boulders imported from Dinosaur Quarry.
Progress Payment #3: Retented 20 boulders due to poor installation.
Progress Payment #4: Stockpiled boulders do not meet spec, marked as info only. Retent 25 boulders due to poor installation.

Pay Note Summary
[Show Full Summary](#)

Pay Note Number	Pay Note Date	Location/Description	Account Totals	Remarks	Total Pay Note Quantity
9	September 1, 2010	Entry 1: Boulders at the beach	CON01 PLH Funding Quantity: 66 CON02 Money from County Quantity: 0	Entry 1:	66 EACH
10	September 2, 2010	Entry 1: Boulders at kiosk	CON01 PLH Funding Quantity: 37 CON02 Money from County Quantity: 0	Entry 1:	37 EACH
11 (For Information Only)	September 3, 2010	Entry 1(10): Stockpiled	CON01 PLH Funding Quantity: 0 CON02 Money from County Quantity: 0	Entry 1 (10):	0 EACH
12	September 6, 2010	Entry 1: WBoulder projection at river	CON01 PLH Funding Quantity: 13 CON02 Money from County Quantity: 0	Entry 1:	13 EACH

- D. Pay note quantity totals by account for this pay period
- E. Total Quantity = Pay note quantity totals for this pay period
- F. Pay Item Totals = All pay notes paid previous pay periods + pay notes this pay period – retent(s) this pay period
- G. Program automatically adds previous payment period’s retent back in to be paid and is included in Pay Item Total

- H. Enter retent this period by account (In order for "F" to recalculate based on added retent, "save")
- I. Enter remarks by account

💡 If Progress Payment Section with retent does not appear, there are pay notes that have not yet been approved; therefore the pay note summary cannot be completed.

Summary Table:

CON01 PLH Funding	Quantity:	116
CON02 Money from County	Quantity:	0
Total Quantity:		116
Pay Item Total:		974

Progress Payment - CON01 PLH Funding

Subtotal From Pay Notes: 116 EACH

Retent From Previous Progress Payment: 20 EACH

Subtotal: 136 EACH

Retent This Progress Payment: EACH

Amount To Progress Payment: 111 EACH

Previous Remarks:

Remarks:

Progress Payment - CON02 Money from County

Subtotal From Pay Notes: 0 EACH

Retent From Previous Progress Payment: 0 EACH

Subtotal: 0 EACH

Retent This Progress Payment: EACH

Amount To Progress Payment: 0 EACH

Previous Remarks:

Remarks:

Callout Boxes:

- D:** Points to the 'CON01 PLH Funding' row in the summary table.
- E:** Points to the 'Total Quantity' row in the summary table.
- F:** Points to the 'Pay Item Total' row in the summary table.
- G:** Points to the 'Retent From Previous Progress Payment' field in the CON01 section.
- H:** Points to the 'Retent This Progress Payment' input field in the CON01 section.
- I:** Points to the 'Remarks' text area in the CON01 section.
- G:** Points to the 'Retent From Previous Progress Payment' field in the CON02 section.
- H:** Points to the 'Retent This Progress Payment' input field in the CON02 section.
- I:** Points to the 'Remarks' text area in the CON02 section.

J. Print Preview (Contractor Version) - Pay Note Summary Report

Acct	Contract Quantities				Revised Quantities		Progress Payment Quantities				Probables			
	Quantity	Unit Price	Unit	Amount	Qty	Amount	Current	Previous	To Date	Amount	% Comp.	Quantity	Amount	% Over / Under
	860	\$25.00	EACH	\$21,500.00	860	\$21,500.00	111	863	974	\$24,350.00	100.72	967	\$24,175.00	12.44
CON01	567	\$25.00	EACH	\$14,175.00	567	\$14,175.00	111	475	586	\$14,650.00	103.35	567	\$14,175.00	0.00
CON02	293	\$25.00	EACH	\$7,325.00	293	\$7,325.00	0	388	388	\$9,700.00	97.00	400	\$10,000.00	36.52

4.6.3.6 Non CM Pay Items

Non-CM pay items are items that can be added to the contract without a contract modification.

Non-CM pay items are either:

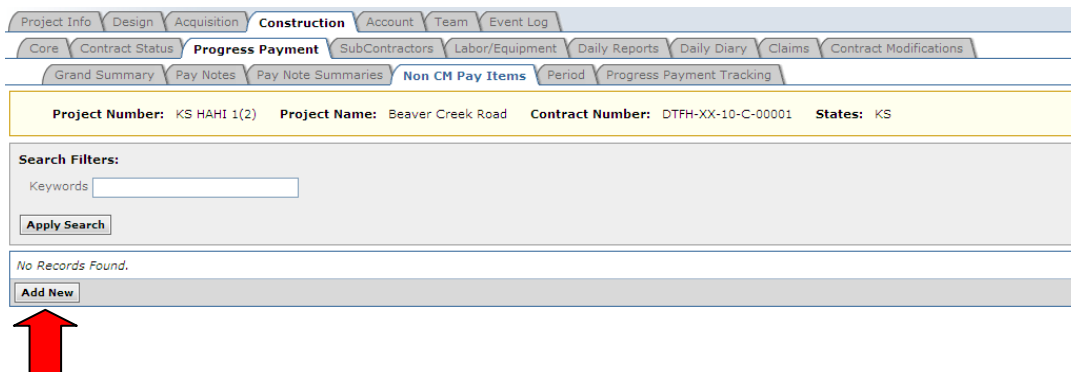
- Pay Item specific, such as materials-on-hand, quality incentives, and preparatory work, etc.
- Non pay item specific, such as liquidated damages, interest, lab trailer payments, etc.

Do not delete non-CM pay items, unless they have been added in error. If non-CM pay items have been added correctly, but are no longer needed, adjust via the probables and/or pay notes.

Roles with *create, edit, delete non-CM pay items* rights: Construction Component lead, Construction Admin staff, COE (project), Project Engineers/Assistant PE (project)

- 💡 From Grand Summary tab, print out a copy of the government receiving report (in order to have copy of line item numbers), prior to adding non-CM pay items.

Click 'Add New' to start the process for adding a new Non CM item.



A new screen will open for the non cm item. The first step is to decide if it is a Pay Item Specific or Non Pay Item Specific. See the following sections for instructions for each option.

4.6.3.7 Period

This where progress payment period dates can be set or edited. Periods are usually one month, they cannot overlap, and there can be no gaps between periods. This is also where the progress payment type is selected.

Roles with *edit period rights*: Construction Component Lead, COE (project), Project Engineers, and Assistant PE's (both in-house & AE).

Roles with *delete period rights*: Construction Component Lead, Construction Admin Staff, COE (project), Project Engineers, and Assistant PE's (both in-house & AE)

See Progress Payment list for checking status, type, and period dates for all progress payment periods.

Project Info Design Acquisition **Construction** Account Team Event Log
 Core Contract Status **Progress Payment** SubContractors Labor/Equipment Daily Reports Daily Diary Claims Contract Modifications

Project Number: KS PRA HEMI 10(1) Project Name: Leopard Creek Contract Number: DTFH70-10-D-0TEST T-10-001 States: KS

Search Filters:
 Start Date: [] [select] [clear] to [] [select] [clear] End Date: [] [select] [clear] to [] [select] [clear]
 Payment Type: [] [v]
 Apply Search

Items 1-7 of 7

Actions	Pay Period Number	Payment Status	Payment Type	Start Date	End Date	Amount Paid
[]	0	Approved	Initial	-	-	\$0.00
[]	1	Paid	Progress	Jun 11, 2010	Jul 11, 2010	\$114,600.00
[]	2	Paid	Progress	Jul 12, 2010	Aug 11, 2010	\$7,500.00
[]	3	Paid	Progress	Aug 12, 2010	Sep 11, 2010	\$20,575.00
[]	4	Paid	Progress	Sep 12, 2010	Oct 12, 2010	\$482,775.00
[] []	5	Current	Progress	Oct 13, 2010	Nov 12, 2010	\$48,955.00
[] []	6	Current	Progress	Nov 13, 2010	Dec 13, 2010	\$0.00

Items 1-7 of 7

4.6.3.7a Progress Payment Account (subtab)

The purpose of the Account (subtab) is to capture the account data for a specific progress payment period. Once the progress payment period is approved, this account subtab locks the account data as of the approval date for the specific progress payment period.

Project Info **Construction** Team
 Core **Progress Payment** SubContractors Labor/Equipment Daily Reports
 Grand Summary Pay Notes Pay Note Summaries Non CM Pay Items Period **Account** Progress Payment Tracking

Showing account information from period 2 INS.

Search Filters:
 Keyword: [] Account Type: [] [v]
 Apply Search

Items 1-3 of 3

Actions	Account Code	Description	Account Number	Chain
[]	CON01	PLH Funding	12-12345-12345678	
[]	CON02	Money from County	12-12345-12347000	CON02-CON03
[]	CON03	ARRA Funds	123-45678	CON02-CON03

Items 1-3 of 3

4.6.3.8 <Reserved>

4.6.3.9 Progress Payment Tracking

The Progress Payment Tracking tab tracks important progress payment dates, payment comments, payment supporting documentation, as well as allowing the office to approve payments.

Roles with ability to enter/edit/approve Progress Payment and tracking: Component Lead, Construction Admin staff, COE (project).

Most users can only view the Progress Payment Tracking Tab.

Users can edit and view information for all progress payments regardless of which payment period they selected. From the Progress Payment Tracking tab:

- A. Pay Period Number
- B. Select Contractor's Invoice Received Date
- C. Select Contractor's Cert Received Date
- D. Select Progress Payment Approved Date. Filling in this date locks the Progress Payment and changes the status to "Approved.". Information can no longer be added or edited by the Office (or the Field), unless the Progress Payment Approved date is "cleared." The 14 day time count in EEBACS begins at the Progress Payment Period Approved date (which is the date a non-defective invoice is received).
- E. Select Construction Days to Process (default: 10). This value can be changed to allow enough time to process the Progress Payment to Finance in time, adjusting time for non-work days.
- F. Date Due to Finance: Contractor's Cert received date + Construction Days to Process
- G. Select Actual Date to Finance
- H. Days to Payment (default: 14). Change this value to 30 days if it is the Final Progress Payment.
- I. Due Date for Payment: Contractor's Cert received date + Days to Payment
- J. Select Actual Payment Date. This changes the Progress Payment Period status to "Paid."

WARNING: Once the Actual Payment Date has been entered, the Progress Payment is finalized and the payment or any contract modifications added during this payment period can never be modified. Even if the date is cleared, no modifications can be made.

Pay Period Number	Contractor's Invoice Received Date	Contractor's Cert Received	Progress Payment Approved	Construction Days to Process	Due Date to Finance	Actual Date to Finance	Days to Payment	Due Date for Payment	Actual Payment Date
0	<input type="text"/>	<input type="text"/>	<input type="text"/>	10			14		
1	07-07-2010	07-07-2010	07-13-2010	10	07-17-2010	07-16-2010	14	07-21-2010	07-21-2010
2	08-09-2010	08-13-2010	08-20-2010	10	08-23-2010	08-23-2010	14	08-27-2010	08-27-2010
3	09-08-2010	09-08-2010	09-16-2010	10	09-18-2010	09-16-2010	14	09-22-2010	09-22-2010
4	10-06-2010	10-06-2010	10-18-2010	10	10-16-2010	10-18-2010	14	10-20-2010	10-22-2010
5	11-05-2010	11-10-2010		10	11-20-2010		14	11-24-2010	
6	<input type="text"/>	<input type="text"/>		10			14		

- K. Add Document (including rejected invoices). When naming documents include Progress Payment # in filename

4.6.4 Subcontractors

This is where Subcontractors are added and edited in this system to track basic information about subcontractor types, contracts, and work activities. Subcontractors must be added to the system prior to their Labor and equipment being added. Only Subcontractors added into this project will be selectable for Daily Reports. Use documentation provided by the Prime Contractor such as the SF1413 or Division specific forms.

Roles that have rights to *Create Subcontractors*: Construction Component Lead, Construction Admin staff, COE (project), Lead Inspector, all Project Engineer roles. Also, Construction Contractor Lead, Construction Contractor Manager.

Roles that have rights to *edit Subcontractors*: Construction Component Lead, Construction Admin staff, COE (project), Lead Inspector, all Project Engineer roles. Also, Construction Contractor Manager.

Roles with *Delete Subcontractors*: Construction Component Lead, Construction Admin staff, COE (project), all Project Engineer roles

On the Subcontractor Tab:

- Select "Add New" to add Subcontractor

The screenshot shows the 'SubContractors' tab selected in the system. The interface includes a search filter section with the following elements:

- Search Filters:**
 - Subcontractor Name:
 - Type:
 - Work Items:
 - Award Date: to
-
- No Records Found.
-

A red arrow points to the 'Add New' button.

- A. Enter Subcontractor name (company name)
- B. Select Type (multiple selections can be made, see sf1413s or Division specific form)
- C. Enter Phone number (main office)
- D. Enter Cell phone number (of primary contact)
- E. Enter Fax number (main office)
- F. Enter Email address (main office)
- G. Primary Address (main office)

The screenshot shows the 'SubContractors' form within the 'Construction' module. The form is titled 'Sub Contractor' and includes the following fields and options:

- Subcontractor Name*:** A text input field with an orange arrow labeled 'A' pointing to it.
- Type*:** A list of checkboxes for business types:
 - 8(a) Certified
 - HUBZone Small Business (HUB)
 - Large Business Concern (LBC)
 - Service-Disabled Veteran-Owned Small Business (SDVET)
 - Small Business Concern (SBC)
 - Small Disadvantaged Business (SDB)
 - Veteran-Owned Small Business (VET)
 - Woman-Owned business (WOB)
 An orange arrow labeled 'B' points to this section.
- Phone Number:** A text input field with an orange arrow labeled 'C' pointing to it.
- Cell Phone Number:** A text input field with an orange arrow labeled 'D' pointing to it.
- Fax Number:** A text input field with an orange arrow labeled 'E' pointing to it.
- Email Address:** A text input field with an orange arrow labeled 'F' pointing to it.
- Primary Address:** A section titled 'Address #1' containing:
 - Street:** A text input field.
 - City:** A text input field.
 - State:** A dropdown menu.
 - Zip:** A text input field.
 - Country:** A dropdown menu with 'United States' selected.
 An orange arrow labeled 'G' points to this section.

At the top of the form, there are tabs for 'Project Info', 'Design', 'Acquisition', 'Construction', 'Account', 'Team', and 'Event Log'. Below these are sub-tabs for 'Core', 'Contract Status', 'Progress Payment', 'SubContractors', 'Labor/Equipment', 'Daily Reports', 'Daily Diary', 'Claims', and 'Contract Modification'. The main header displays 'Project Number: PRA JOHN 1(1)', 'Project Name: John - Small Test', 'Contract Number:', and 'States: CO'. Below the header are buttons for 'Save & Close', 'Save', and 'Cancel', and a note '* Indicates'.

- H. Enter Contact person (main office)
- I. Select existing, project pay item(s) that the subcontractor will be performing
- J. Select work items to be performed on this contract
- K. Enter Original Subcontracted Award amount as reflected on SF1413 form
- L. Enter Subcontractor Award date as reflected on SF1413 form
- M. Enter Final Subcontracted Award Amount
- N. Toggle yes/no for SF1413 received
- O. Toggle yes/no for SF1413s received (or Division specific form)
- P. Add electronic supporting documentation (i.e. SF1413, SF1413s, etc.)
- Q. Add remarks (i.e. changes to subcontract or subcontractor, additional contact information, etc.)
- R. "Save and Close" sends user back to the Subcontractor list (shown below)

The screenshot shows a web-based form for entering subcontractor information. The form is annotated with callout letters H through Q:

- H**: Points to the "Contact Person" text input field.
- I**: Points to the "Sub Contractor Pay Items" dropdown menu.
- J**: Points to the "Work Items" list box.
- K**: Points to the "Original Subcontracted Award Amount*" text input field.
- L**: Points to the "Award Date*" dropdown menu.
- M**: Points to the "Final Subcontracted Award Amount" text input field.
- N**: Points to the "SF1413?" radio button group.
- O**: Points to the "SF1413s?" radio button group.
- P**: Points to the "Add Document" button.
- Q**: Points to the "Remarks" text area.
- R**: Points to the "Save & Close" button at the bottom of the form.

- A. Total Subcontracted Amount (calculated): total of all Subcontractor Original Award Amounts (calculated)
- B. Percent of Contract Subcontracted (calculated): Total Subcontracted Original Amount/Original Construction Award Amount

- C. Icons provide a quick check to see if contractor has submitted proper paperwork. Green 'check' means paperwork is submitted and complete, Red 'X' means paperwork is missing or is incomplete.

Project Number: KS PRA PEHI 77(7) Project Name: Construction test 9/30/10 HSH Contract Number: DTFH70-11-C-ABCDE States: KS

Search Filters:
 Subcontractor Name Work Items
 Type Award Date to

Actions	Name	Type	Work Items	Contact Person	Phone Number	Original Award Amount	Award Date	SF1413	SF1413s
	Excellent Earthworks	Large Business Concern (LBC)	Earthwork, Obliteration /...	Sue Excellent		\$205,432.00	Nov 02, 2010	X	X
	Sam's Landscaping	Veteran-Owned Small Business (VET)	Seeding / Mulching / Turf...			\$15,123.00	Nov 04, 2010	✓	X
	Triple A Traffic	8(a) Certified	Traffic Control -...	Ayden A. Allen		\$6,432.00	Nov 04, 2010	✓	✓
						Total Subcontracted	\$226,987.00		
						% of Contract Subcontracted	1.574 %		

4.6.5 Labor/Equipment

This is where all labor and equipment on the job is added into the system for the Prime Contractor and all subcontractors. Labor and equipment on this tab is what is used in the Daily Reports (IDRs and CDRs) when logging work activities. Labor/equipment must be added and onsite prior to being able to select/add them to Daily Reports.

Roles that have rights to *Create Labor Equipment*: Construction Component Lead, Construction Admin staff, COE (project), Inspector, Inspector A&E, Lead Inspector, all Project Engineer roles. Also, Construction Contractor Lead, Construction Contractor Manager have these rights.

Roles that have rights to *Edit Labor Equipment*: Construction Component Lead, Construction Admin staff, COE (project), Inspector, Inspector A&E, Lead Inspector, all Project Engineer roles. Also, Construction Contractor Manager have these rights.

Roles that have rights to *Delete Labor Equipment*: Construction Component Lead, Construction Admin staff, COE (project), all Project Engineer roles.

On the Subcontractor tab, select "Add New" to add a new labor or equipment entry

Project Number: PRA JOHN 1(1) Project Name: John - Small Test Contract Number: States: CO

Search Filters:
 Labor/Equipment Move-In Date to
 Type/Classification Move-Out Date to
 Contractor/Subcontractor Hourly Rate

No Records Found.

- A. Select Labor or Equipment
 - B. Enter Type/classification (Labor: flagger, backhoe operator, or Davis Bacon classification; Equipment: backhoe, paver)
 - C. Supplemental Description (Labor: leave blank, specific name, other detail; Equipment: leave blank, Make, model, year of manufacture, license #, identifying mark, etc.)
 - D. Move-in date
 - E. Move-out date
- 💡 Add a new entry for each move-in/move-out period for the same labor or equipment
- F. Hourly rate (see Division procedures)
 - G. Select Contractor or Subcontractor that the labor/equipment is assigned to
 - H. Add supporting documentation if needed (flagger's card, equipment spec sheet, inspection log, photograph of equipment, etc.)
 - I. "Save and Close" sends user back to the Labor/equipment list (shown below)

The screenshot shows the 'Labor/Equipment' form with the following fields and annotations:

- A:** Points to the 'Labor/Equipment*' dropdown menu.
- B:** Points to the 'Type/Classification*' text input field.
- C:** Points to the 'Supplemental Description' text area.
- D:** Points to the 'Move-In Date*' date picker.
- E:** Points to the 'Move-Out Date*' date picker.
- F:** Points to the 'Hourly Rate' text input field.
- G:** Points to the 'Contractor/SubContractor*' dropdown menu.
- H:** Points to the 'Supporting Documents' section, specifically the 'Add Document' button.

Buttons at the top: Save & Close, Save, Cancel. Buttons at the bottom: Save & Close, Save, Cancel. A note '* Indicates a required field' is present in the top right corner.

💡 Paving Machine and Operator are added as a new entry for each move-in/move-out period

Core Contract Status Progress Payment SubContractors **Labor/Equipment** Daily Reports Daily Diary Claims Contract Modifications

Project Number: PRA JOHN 1(1) Project Name: John - Small Test Contract Number: States: CO

Search Filters:

Labor/Equipment Move-In Date to

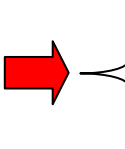
Type/Classification Move-Out Date to

Contractor/Subcontractor Hourly Rate

Items 1-10 of 10

Actions	Type/Classification	Supplemental Description	Labor/Equipment	Contractor/SubContractor	Move-In Date	Move-Out Date	Hourly Rate
	Hand Compactor		Equipment	Triple A Sidewalks	Sep 22, 2010	Oct 15, 2010	\$200.00
	Crew chief	Alyssa Allen	Labor	Triple A Sidewalks	Sep 27, 2010	Nov 03, 2010	\$65.00
	Labor		Labor	Triple A Sidewalks	Oct 13, 2010	Oct 29, 2010	\$25.00
	Hydraulic Excavator	2009 Cat 330D	Equipment	Excellent Earthwork	Oct 14, 2010	-	\$250.00
	Bulldozer	Lic#13543	Equipment	Excellent Earthwork	Oct 15, 2010	-	\$0.00
	Backhoe loader	Cat 450E serial #24567	Equipment	Excellent Earthwork	Oct 25, 2010	-	\$65.00
	Paving Maching	AS2252 Vers-A-Mat Asphalt Screed	Equipment	Testing-R-Us (Contractor)	Oct 28, 2010	Nov 05, 2010	\$350.00
	Paving Machine - Operator	Billy Allen	Labor	Testing-R-Us (Contractor)	Oct 29, 2010	Nov 05, 2010	\$44.33
	Paving Machine	AS2252C Vers-A-Mat Asphalt Screed	Equipment	Testing-R-Us (Contractor)	Dec 01, 2010	-	\$350.00
	Paving Machine - Operator	Billy Allen	Labor	Testing-R-Us (Contractor)	Dec 01, 2010	-	\$44.33

Items 1-10 of 10



4.6.6 Daily Reports

This is where the Daily Inspections Reports for both Government (IDR's) and Contractors (CDRs) are entered.

Roles with rights to *Create IDR* (includes right to edit/delete their own IDR. Users cannot edit/delete IDR's developed by others.): Construction Component Lead, Construction Engineer (Branch Chief), COE (project), all government and AE Inspector roles, all government and AE Project Engineer Roles.

Roles with right to *Create CDR* (includes right to edit/delete the own CDR. Users cannot edit/delete IDR's developed by others.): Construction Component Lead, Construction Contractor Basic, Construction Contractor Lead, Construction Contractor Manager.

Roles with right to *Review and Approve Daily Reports*: Construction Component Lead, COE (project), project Engineer- Temporary, Project Engineer, project Engineer A&E

Component Leads have ability to add/edit their own CDR. They cannot edit the Contractor's CDRs. (Only purpose for the Component Lead to add/edit a CDR is to assist contractor to trouble shoot)

From the Daily Reports tab, on the Existing Daily Reports subtab:

- A. Select Icon to View or Edit Daily Report as necessary
 - 💡 If Daily Report status is "pending review", the edit icon provides access to Approve/Reject the Daily Report for those roles with approval rights
- B. Select "Add New"

The screenshot shows the 'Existing Daily Reports' subtab in the software interface. It includes search filters for Keyword, Type (IDR/CDR), Contractor/SubContractor, Date, Reported By, Reviewed By, and Status (Draft, Pending Review, Approved, Rejected). Below the filters is a table with 5 items. An arrow labeled 'A' points to the edit icon in the 'Actions' column of the last row (Oct 29, 2010, IDR, Miller Trucking, Pending Review). Another arrow labeled 'B' points to the 'Add New' button below the table.

Actions	Date	Type	Contractor/SubContractor	Reported By	Reviewed By	Status
	Apr 14, 2010	CDR	JP Services / Thing One (Contractor)	Billy CCInspect		Draft
	Apr 16, 2010	IDR	JP Services / Thing One (Contractor) / Miller Trucking	Lorell K. Duteil	Lorell K. Duteil	Approved
	May 25, 2010	IDR	Buckwheat's haul-all / Thing One (Contractor)	Inspect Gov1	Jane PE	Rejected
	Jun 02, 2010	IDR	JP Services / Buckwheat's haul-all	Jane PE		Draft
	Oct 29, 2010	IDR	Miller Trucking	Heidi Hirsbrunner		Pending Review

- A. Type: IDR or CDR will be pre-selected based on user's type (this will not appear until the report has been saved)
- B. Select one or more Contractor or Subcontractor(s) (see Division procedures). Only labor and equipment from Contractors/subcontractors selected will be available for use on this IDR/CDR
- C. Select date of IDR/CDR
- D. Select Shift Start
- E. Select Shift End
- F. Enter Weather/Temperature
- G. Enter Amount of Precipitation
- H. Select work activity code - Usually start with the letter A, select next activities in alphabetical order.
- I. Describe work activity
- J. Describe work activity location
- K. Select all applicable work activity pay items. (Pick list includes only project specific pay items)

💡 Multiple work activities can be added to the same Daily Report using separate activity codes

The screenshot shows the 'Daily Reports' section of a software interface. At the top, there are navigation tabs: Core, Contract Status, Progress Payment, SubContractors, Labor/Equipment, Daily Reports (selected), Claims, and Contract Modifications. Below the tabs, a yellow bar displays project information: Project Number: PRA JOHN 1(1), Project Name: John - Small Test, Contract Number: , States: CO. Below this are buttons: Save & Close, Save, Delete, Cancel, Cancel & Close, Submit To PE, and Print Preview.

The main form is titled 'Daily Report' and contains the following fields with callouts:

- A:** Type: IDR
- B:** Contractor/SubContractor*: Testing-R-Us (Contractor), Excellent Earthwork, Sam's Surveying, Triple A Sidewalks
- C:** Date*: 10-29-2010
- D:** Shift Start*: 08:00 am
- E:** Shift End*: 08:00 am
- F:** Weather/Temperature: [empty field]
- G:** Amount of Precipitation: [empty field]

The 'Work Activities' section contains 'Work Activity #1' with the following fields and callouts:

- H:** Work Activity Code*: A
- I:** Description*: Paving top lift
- J:** Location*: sta 50+01 to 64+78
- K:** Work Activity Pay Items*: [select] (with a list of items below: A0249: 40101-1000 QM SUPERPAVE PAVEMENT, 3/4-INCH NOMINAL MAXIMUM SIZE AGGREGATE, 0.3 TO <3 MILLION ESAL; A0220: 40101-1000 NS SUPERPAVE PAVEMENT, 3/4-INCH NOMINAL MAXIMUM SIZE AGGREGATE, 0.3 TO <3 MILLION ESAL)

To create and use Daily Reports Templates see *Appendix: Save as a Template*.

- L. Select Add Labor
- M. Select Labor classification
- N. Enter number of labor for that classification
- O. Enter Production time *per person*
- P. Select Delete if classification was entered incorrectly
- Q. Labor Total (calculated): Total of all added labor classifications: number of labor classification x production time x hourly rate for each

💡 The hourly rates are added on the Labor/Equipment tab and may not exist. If hourly rates are not entered, the Labor total may not reflect the true costs.

💡 If general labor classification staff work different hours, add labor separately on an individual basis

Classification*	Number*	Production Time (hrs)*	
Labourer	2	8	Delete
Quality Control Manager	1	8	Delete
Paving Machine - Operator Billy Allen	1	8	Delete
Labourer	1	4	Delete

Labor Total: \$1,262.64
 Equipment Total: \$0.00

- R. Select Add Equipment
- S. Select Equipment type
- T. Enter Number of equipment type
- U. Enter Production time – actual time in operation per each piece of equipment
- V. Enter Idle time – time not in operation
- W. Select Idle code
- X. Select Delete if equipment type was entered incorrectly
- Y. Equipment Total (calculated): Total of all added equipment types: number of equipment type x production time x hourly rate for each
- Z. Deletes entire work activity (code, description, location, labor, etc.)
- AA. If additional work activities are needed, select Add Work Activity.

- 💡 The hourly rates are added on the Labor/Equipment tab and may not exist. If hourly rates are not entered, the Equipment total may not reflect the true costs.
- 💡 If general equipment classification work different hours, add equipment separately on an individual basis
- 💡 If multiple idle codes are needed for the same piece of equipment or for the same equipment classification, add a separate equipment entry for each additional idle code
- 💡 Labor and equipment values may not truly reflect the cost. Totals only reflect hourly rates entered on the labor/equipment tab

The screenshot shows the 'Work Activity #1' interface. It includes fields for 'Work Activity Code*', 'Location*', 'Description*', and 'Work Activity Pay Items*'. Below these are two tables: 'Labor' and 'Equipment'. The 'Labor' table has columns for 'Classification*', 'Number*', and 'Production Time (hrs)*'. The 'Equipment' table has columns for 'Type*', 'Number*', 'Production Time (hrs)*', 'Idle Time (hrs)*', and 'Idle Code'. At the bottom, there are 'Labor Total' and 'Equipment Total' fields, and buttons for 'Delete' and 'Add Work Activity'. Callout letters point to various elements: Z to 'Delete', AA to 'Add Work Activity', R to 'Add Equipment', S to 'Type*', T to 'Number*', U to 'Production Time (hrs)*', V to 'Idle Time (hrs)*', W to 'Idle Code', X to 'Delete' (equipment), and Y to 'Equipment Total'.

- 💡 Not seeing the labor or equipment you need on the dropdown?
 - Make sure Contractor/Subcontractor is selected at the top of Daily Report
 - Check Move-out/move-in date (labor/equipment must be on site for the date of the Daily Report)

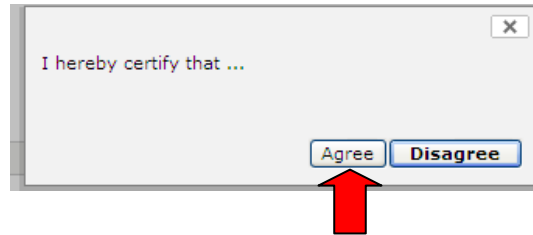
- BB. Enter Daily Narrative
- CC. Enter Quality Control Narrative Report
- DD. Select Traffic Control Checked (if "yes, problems" is selected, a comment box appears)
- EE. Select Erosion/sediment control checked (if "yes, problems" is selected, a comment box appears)
- FF. Select Unsafe operations observed (if "yes" is selected, a comment box appears)
- GG. Select Accidents (if "yes" is selected, a comment box appears)
- HH. Add Specific note, see subsection 4.6.6.2
- II. Add supporting documentation (such as photographs)
- JJ. Print Preview of Daily Report
- KK. Submit to PE (report is completed and ready to sign)

The screenshot displays the software interface for entering a daily report. It is divided into three main sections:

- Daily Narrative Record:** A text area with a rich text editor toolbar. An orange arrow labeled 'BB' points to the text input field.
- Quality Control Narrative Report:** A text area with a rich text editor toolbar. An orange arrow labeled 'CC' points to the text input field.
- Safety, Erosion & Traffic Control Inspection:** A form with several radio button options:
 - Traffic Control Checked?: Yes; No Problems, Yes; Problems, No
 - Erosion/Sediment Control Checked?: Yes; No Problems, Yes; Problems, No
 - Unsafe Operations Observed?: Yes, No
 - Accidents?: Yes, No
 - Add Specific Notes?: Yes, No
 - Supporting Documents:
 - Reported By*: Heidi Inspector

At the bottom, there is a row of buttons: Save & Close, Save, Delete, Cancel, Cancel & Close, Submit To PE, and Print Preview. Orange arrows labeled 'KK' and 'JJ' point to the 'Submit To PE' and 'Print Preview' buttons, respectively. On the right side, a 'Problems' text area is visible, with a red arrow pointing to it. Another red arrow points to the 'Submit To PE' button.

If a report is saved without 'submitting to PE' it will show as "draft status" on the Existing Daily Report list tab. Once Submit to PE has been selected a certification will appear, select "Agree" to complete submission to PE. (Note: The wording of the certification will depend on whether the Daily Report is an Inspector Daily Report or a Contractor Daily Report).



After a Daily Report is submitted, it is shown as "pending review" status on the list tab.

- 💡 If the Daily Report is completed by the PE it is automatically approved and no further action is required.

4.6.6.2 Add Specific Notes

Specific Notes are used to tag Daily Reports with important and/or unusual issues (i.e., re-occurring issues)

- A. If "yes" is selected the following appears
- B. Enter new Notes: Describe unusual issue, *or...*
- C. Select existing saved note from drop-down list (once selected, the note will populate in Notes box for editing)
- D. Check box to save the current "Notes" for use on future Daily Reports. (i.e. Save Current Notes means it will be added to the above dropdown list)

