CONSTRUCTION MANAGEMENT SYSTEM

CONSTRUCTION MEASUREMENT & PAYMENT (CM&P)

South Dakota DOT

Connecting South Dakota and the Nation

1. Introduction to the Construction Measurement & Payment System Application

CM&P Application Overview

At any given time, the South Dakota Department of Transportation (DOT) has hundreds of construction, renovation, and repair contracts across the state. Each contract can be comprised of multiple projects and their specific pay items. The result is a complex array of tiered components, project specifications, material requirements, schedules and deadlines, and financial information. Tight control must be maintained over each contract to ensure that contract and quality objectives are met.

The CM&P System was designed and developed to assist DOT personnel in managing all of this information. The program organizes and arranges complex contract information into an easy-to-use windows environment. From the time that field measurements and observations are made, DOT personnel have instant access to detailed information about contracts and projects across the state.

The CM&P System is designed for the end user. Each user has a logon and password that allows him or her to record information in various parts of the program, thereby ensuring information integrity. Recording this information is made easy through windows and controls that relate to specific user and job responsibilities. All calculations are performed automatically, and detailed reports can be viewed and printed.

The CM&P System marks a landmark in contract management for the South Dakota DOT. The value of the system spans professions, divisions, and personnel locations. Detailed information at all levels, from the general contract to specific pay items, can now be viewed and easily maintained.

The CM&P System integrates project needs and requirements with DOT processes and procedures. Employees (Recorders) at each site input information about such things as material deliveries, weather conditions, and contractor problems. State personnel who oversee each project have instant access to this recorded information so they can make timely decisions, payments, and inquiries. The intricacies and complexities of DOT contract management are now contained in an easy-to-use software application.

The Construction Measurement & Payment (CM&P) System was developed for use by SD DOT construction and central office personnel. The CM&P System allows SD DOT personnel to remotely record material deliveries, contractor working status, weather observations at job sites, initiate contract change orders (CCO's), pay estimates, and contract issues. However, the most beneficial aspect of the CM&P System is that all necessary information will be available to all SD DOT personnel (depending on security level) across the state within hours of entry. This enables management to solve problems as quickly as possible, as well as allowing for more accurate project tracking. Also highly beneficial to SD DOT personnel, each piece of information will be handled (keyed in) only once—currently the same information must be written or typed onto many forms. This will free up time for people to do more important tasks.

CM&P System User Guide Introduction

The Construction Measurement & Payment (CM&P) System User Guide is a training and reference manual covering the functions of the CM&P System. The material in this manual is tutorial in nature and contains step-by step instruction how to:

- Use mobile applications
- Logon
- Find the desired work for completion
- Use the functions within the following main windows:

Manage Contract	Work Authorization
Record Work	Biweekly Progress Report
Pay Estimate	Contract Weather Day
Contract Change Order	Contract Conflict
Contract Issue	Visual Inspection

- Use functions within the following administration windows:

Management Notification Window	Categorize Contract Change Items Window
Finance Notification Window	User Maintenance Window
Finals Engineer Notification Window	Subcontract Maintenance Window
Subcontract Maintenance	

- Use change request and problem report functions
- Generate reports
- Use the Online Help System

This basic procedural manual is only part of the CM&P instruction and information available to DOT personnel. CM&P windows and functions are more extensively explained in the Online Help available through the menu path: **Help, Help Topics** or through any **Help Button**.

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3. CM&P Manual Conventions

The manual is intended for DOT personnel who use the CM&P System.

The CM&P System consists of a series of screens called windows and panels. To assist you in identifying the different screen components, this manual uses the following style conventions:

Menu paths are shown as they appear on the screen, but in bold.

Follow menu path **Reports, Record Work, Install Item Summary**.

The names of windows and panels or tabs are shown as they appear on the screen.

Record Work Window

Manage Contract Identifying Tab

Data fields and checkboxes are shown exactly as they appear on the screen, but in bold.

Project field

Closed checkbox

Terminal keys, Toolbar buttons, and screen buttons are shown exactly as they appear on the keyboard, but in bold, with their icons when appropriate.

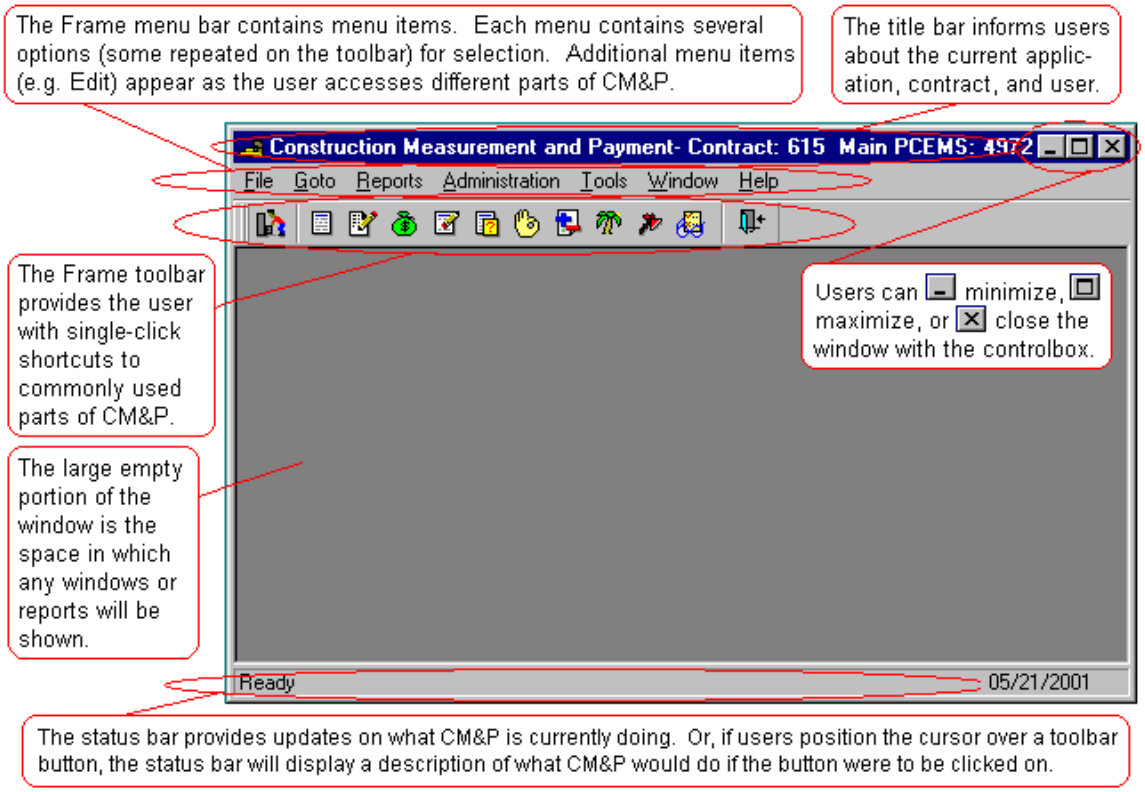
Enter	Click on the **Record Work Button**
Tab	Click on the **Save Button**
F5	

If two or more keys must be pressed simultaneously, they are shown with a plus sign (+).

Shift + Tab

Starting Point

All instructions within the CM&P System assume users have selected a contract and are currently viewing the Frame Window shown below.



Application Navigation

Construction Measurement & Payment (CM&P) designers have made it easy to access windows and accomplish tasks throughout the CM&P System. There are five basic methods: menus, mouse, shortcut keys, toolbar and command buttons, and the **Tab** key.

Menu Bar

Always available at the top of the screen, the menu bar provides an organized way of accessing common commands and options through its menu items. The **F10** key will make the Menu Bar active. When the Menu Bar is active, Menu items can be chosen by either using the arrow keys to highlight the Menu item and pressing **Enter** (or single clicking), or pressing **Alt** and the underlined letter in its name.

Mouse

The mouse enables users to easily move the cursor between data fields and command options. The buttons on the mouse activate and deactivate options, and allow users to select the necessary information and commands with a touch of a finger.

Shortcut Keys

These are combinations of two keys—**Alt** and the underlined letter in the command name. The combination of these two keys executes the task.

Toolbar Buttons

A row of icons shown at the top of the screen, beneath the title and menu bars. By clicking on a toolbar button, users can open a new window or perform a task.

Buttons throughout the CM&P System have three modes—unavailable , available , and selected --which indicate the current status of the button. Selected buttons are active. They are displayed in a three-dimensional, color view to resemble physical buttons that have been depressed. Available buttons also display as three-dimensional but resemble buttons that have not been depressed. Unavailable buttons display as "shaded out," with no color being visible.

Tab Key

Using the **Tab** key, users can move directly from one entry field on the screen to the next in a pre-set order. The **Tab** order will cycle around the screen through entry fields, checkboxes (click or push the space bar to check one), and function keys (click or push the **Enter** key to activate one), so users can keep tabbing to reach a previous field or choice again.

To return to the entry field immediately previous to the current one (Tab Backwards), use **Shift + Tab**.

What's a Window?

A "window" is a graphical means of displaying and viewing data. The Construction Management & Payment (CM&P) uses windows to provide requested information. All windows share at least a few common characteristics that provide a sense of familiarity as users move throughout the CM&P System. Other important window features are title bars, scrollbars, the format popup menu, tree (panel) and list (panel).

Title Bar

The title bar is the navy blue bar across the top of a window or wizard, often containing other identifying information in addition to the title. The title bar can be used to move a window or wizard around on the screen, by clicking down on it and dragging it before releasing the mouse button.

Scrollbar

An important feature of many windows is the scrollbar. There are two types of scrollbars: vertical and horizontal. Users are automatically provided scrollbars when the information to be displayed requires more space than the window allows. There are two ways to use a scrollbar. Click on the arrow indicating the desired direction for more information. Drag the scrollbar toward the arrow indicating the desired direction for more information.

Format Popup Menu

Users can customize certain characteristics of the interface to their individual needs and likes. Such customization is accomplished with the Format popup menu (shown below). This menu is obtained by right clicking the mouse anywhere on the blank portion of the Frame toolbar (Frame Bar).

WARNING: Do not remove the checkmark next to the Frame Bar option.

Tree

The hierarchical display of information seen in the left panel of windows such as the Record Work Window and Pay Estimate Window. The tree enables users to instantly view and recognize the hierarchical relationships that exist between elements such as pay estimates and pay items. The tree is ordered from the most general level, or "branch," to the most specific.

List

The panel located to the right of a tree. Lists provide users with detailed information about the item or branch selected in the tree.

What's a Button?

Buttons are located on toolbars and serve as graphical shortcuts to different parts or actions within the CM&P System. They enable users to begin certain tasks (e.g., installing an item) without selecting a menu and then locating the desired option.

Buttons throughout the CM&P System are "smart," that is, they show when various options are available and when they are not. Regardless of their locations, buttons—both toolbar and command buttons (those located directly on windows)—are activated by a single click of the mouse. Command buttons can also be activated by pressing **Alt** and the underlined letter of the button name.

A button has three "modes"—unavailable , available , and selected —which indicate the current status of the button.

ToolTips are always available when the cursor is hovered over a button, regardless of the current status of the button.

Construction Measurement & Payment Toolbar

The Construction Measurement & Payment Frame Window Toolbar appears below the menu bar when CM&P opens and its buttons perform the functions explained below.

The **Select Contract Button** allows users to return to the Select Contract Window.

The **Manage Contract Button** opens the Manage Contract Window within which users can access administrative information and set up a contract.

The **Record Work Button** opens the Record Work Window within which users can create, edit, and delete recorded measurements.

The **Pay Estimate Button** opens the Pay Estimate Window within which users can create and edit pay estimates.

The **Contract Change Order Button** opens the Contract Change Order Window within which users can create, edit, and delete Contract Change Orders (CCO's).

The **Contract Issues/Spec Dev Button** opens the Contract Issue Window within which users can record, edit, and resolve contract issues and specification deviation issues.

The **Work Authorization Button** opens the Work Authorization Window within which users can create, edit, and delete work authorizations.

The **Biweekly Progress Report Button** opens the Biweekly Progress Reports Window within which users can create, edit, and delete biweekly progress reports.

The **Contract Weather Day Button** opens the Contract Weather Day Window within which users can record and edit weather and contractor working day information.

The **Conflicts Button** opens the Item Installation Resolution Window within which users can resolve any conflicts encountered for the contract.

The **Visual Inspection Button** opens the Visual Inspection Window within which users can enter or edit visual inspections for the contract.

The **Exit Button** closes all windows within the application, allowing users to exit the CM&P System.

Data Entry Tips

WARNING: To avoid losing data, use either the **Apply, Save,** or **OK Button** (as appropriate) to save work in the CM&P System whenever pausing in the entry task.

As users enter necessary data into the CM&P System, knowledge about the application's data entry methods can be useful, especially should mistaken keystrokes or other errors occur.

Movement within CM&P Windows

The CM&P System allows users to Tab (using the **Tab** key) from field to field to enter their data. This is a convenient way to be sure that all fields will be filled. The **Tab** key will cycle around through all the fields displayed as well as any checkboxes, radio buttons, and window function buttons. This allows users to keyboard most of the time, since pressing the **Enter** key while a checkbox, radio button, or function button is selected is the same as clicking on any of them with the mouse.

To Tab backwards (returning to the previous field) press **Shift + Tab**.

Mistaken Entry Removal

There are several ways to remove inappropriate entries. Users may use the **Backspace** key, the **Delete** key, or they may **highlight** the entry and type over it.

Use the arrow keys to move onto either side of the decimal point if a field retains a decimal point after an error is removed from it.

CM&P Keystroke Commands

Users who are familiar with Windows Keystrokes may choose to employ keystrokes for functions in CM&P. As in standard Windows procedures, users can call any option available through the frame menu bar by pressing **Alt** + the underlined letter of the desired menu item to highlight the item. Then, they can either press **Alt** + the underlined letter of the desired option in the menu item's drop-down listing, or tab through the options with the arrow keys, pressing **Enter** when they have highlighted their choice.

Other Keystrokes available in CM&P are:

F5 = Refresh

Shift + **F2** = Select a Contract

Ctrl + **P** = Print

About Construction Measurement and Payment Help Menu Item Option

An informational window is displayed for users following the menu path: **Help, About Construction Measurement and Payment**. The About Construction Measurement and Payment Window displays the current version of the open application, the name of the person presently logged on, his or her access privileges, and the database that the application is currently using.

Printer Setup

The Printer Setup Window is displayed for users following the menu path: **File, Printer Setup**. This window displays the printer(s) currently associated with the application. The **Setup Button** Setup... on this window enables users to edit the print properties of an associated printer.

Getting Windows Out of the Way

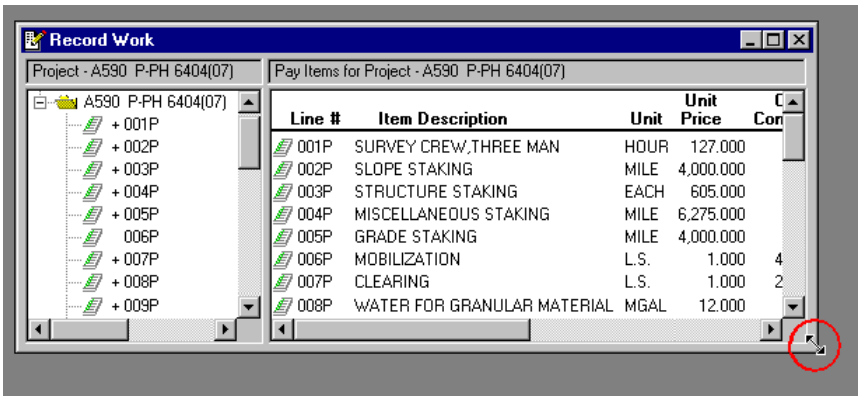
In the CM&P System, it may happen that users will open two or more windows at the same time. Seeing several at once can be accomplished by resizing and/or by dragging them. It may be that the window management options available in the Window Menu item are handiest, or minimizing any windows not currently in use.

Resize a Window

To resize a window (larger or smaller), perform the following steps.

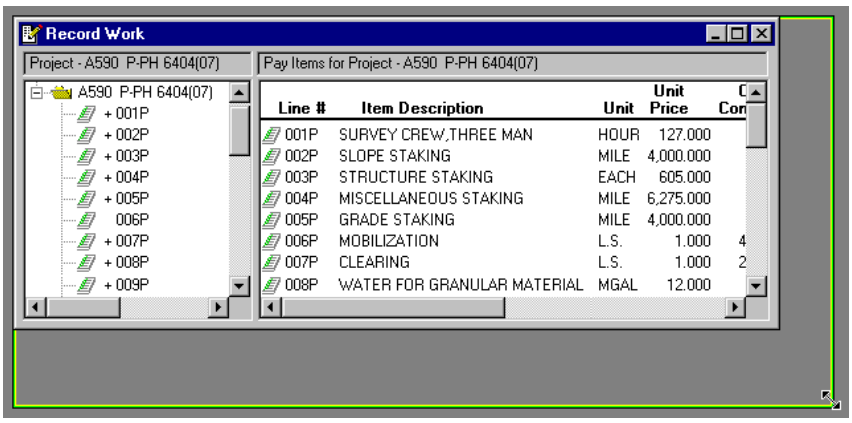
1. Position the cursor on an edge (top, bottom, side) or corner of the window.

   The cursor changes to a double-headed arrow as shown below.



2. Press and hold the left mouse button while moving the mouse to the desired location.

   The window edge or corner moves with the cursor as shown below.



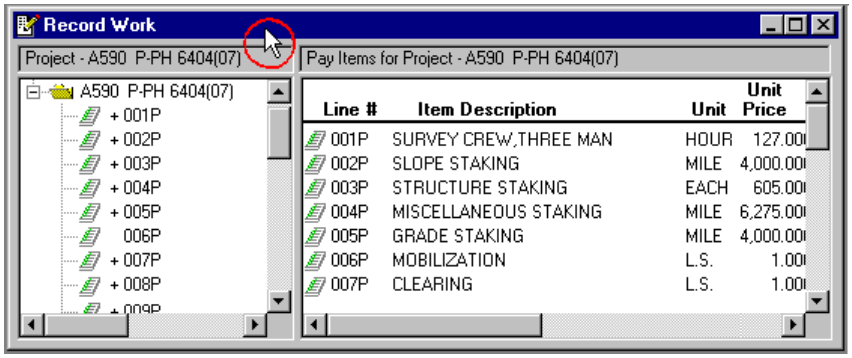
3. Release the mouse button.

   The window remains the new size.

Drag a Window

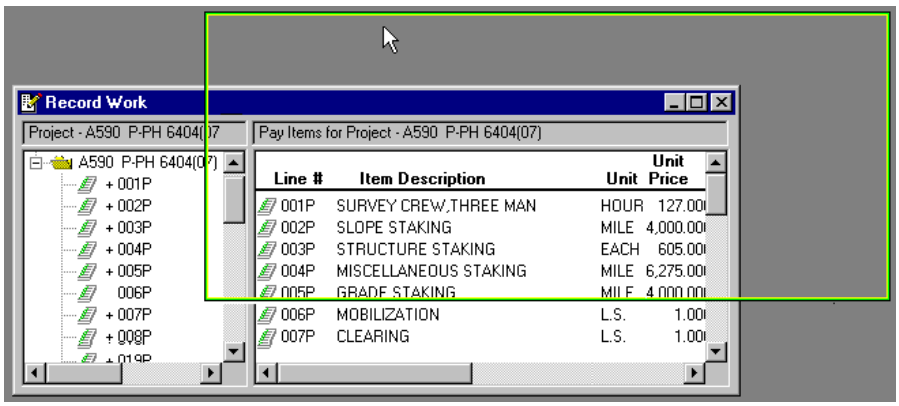
To drag a window to a new location on the screen, perform the following steps.

1. Position the cursor anywhere on the window title bar as shown below.



2. Press and hold the left mouse button while moving the mouse to the desired location.

   The window moves with the cursor as shown below.



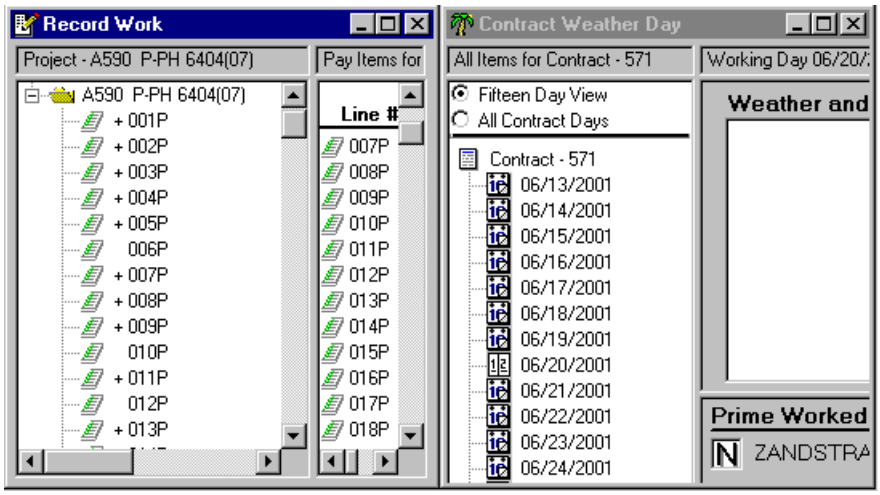
3. Release the mouse button.

   The window remains in the new location.

Window Menu

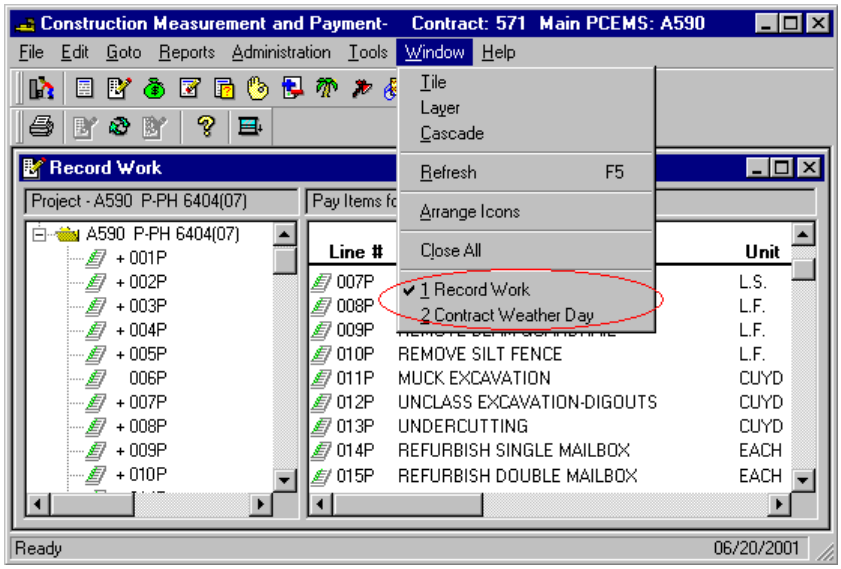
Tile

When the **Tile** Window Menu option is selected, currently open windows (assuming more than one window is open) are arranged side by side.



Layer

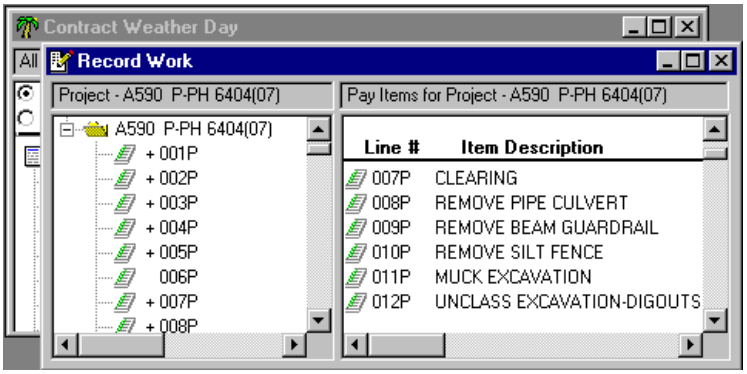
When the **Layer** Window Menu option is selected, windows are displayed directly "on top of" or over previously displayed windows.



Notice that the Open Windows Listing includes another window which cannot presently be seen in this display mode.

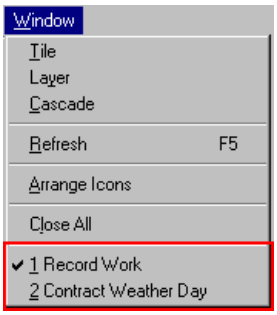
Cascade

When the **Cascade** Window Menu option is selected, windows are offset by approximately one quarter of an inch. This allows users to view the heading information on all currently open windows.



Open Windows Listing

This area of the Window Menu item dropdown (shown outlined below) contains a listing of all the windows currently open in the application.

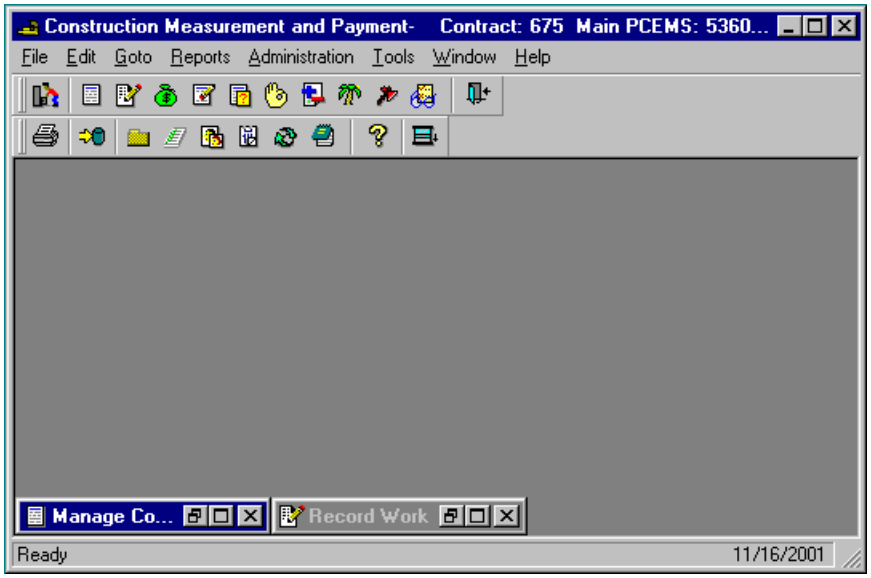


The checkmark indicates the window that is now active (or on top in the **Layer** display mode). Clicking on any other window listed will activate that window.

Minimize Windows

The information in a minimized window is not saved until the **Save**, **Apply**, or **OK Button** is used.

The Minimize Window Button located in the upper right-hand corner of the window allows users to shrink the window on screen without closing it (as shown below) so that they can move easily between it and another window. Using the Resize Button still visible next to the title bar will return the window to the larger size.



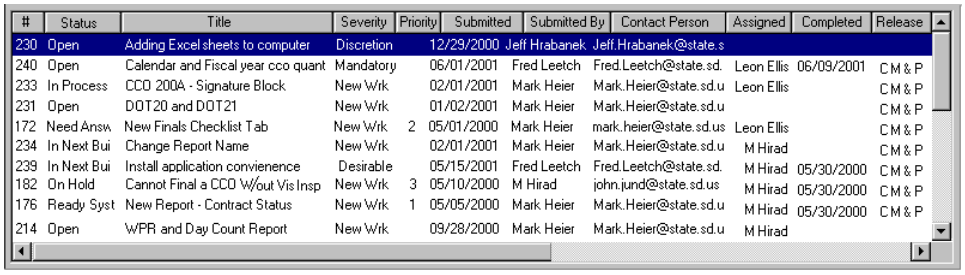
4. Problem Reports and Change Requests

Create a Problem Report

To create a problem report, perform the following steps.

1. Select the **Problem Reports** option from the Help menu on the Frame Menu Bar.

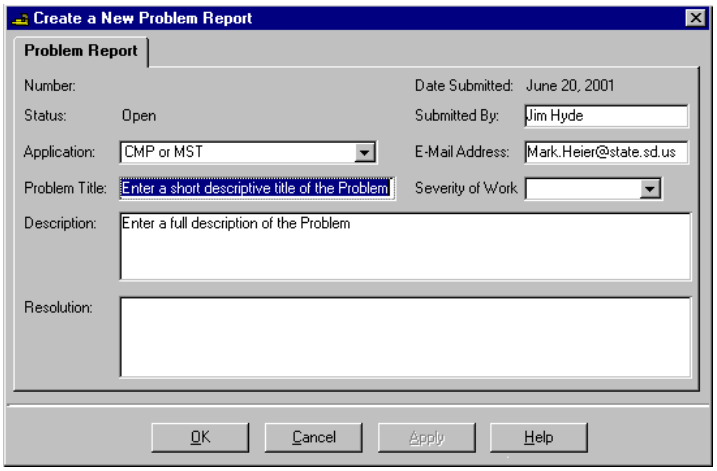
   The Problem Reports Window appears as shown below.



#	Status	Title	Severity	Priority	Submitted	Submitted By	Contact Person	Assigned	Completed	Release
230	Open	Adding Excel sheets to computer	Discretion		12/29/2000	Jeff Hrabanek	Jeff.Hrabanek@state.s			
240	Open	Calendar and Fiscal year cco quant	Mandatory		06/01/2001	Fred Leetch	Fred.Leetch@state.sd.	Leon Ellis	06/09/2001	C M & P
233	In Process	CCO 200A - Signature Block	New Wrk		02/01/2001	Mark Heier	Mark.Heier@state.sd.u	Leon Ellis		C M & P
231	Open	DOT20 and DOT21	New Wrk		01/02/2001	Mark Heier	Mark.Heier@state.sd.u			C M & P
172	Need Answ	New Finals Checklist Tab	New Wrk	2	05/01/2000	Mark Heier	mark.heier@state.sd.us	Leon Ellis		C M & P
234	In Next Bui	Change Report Name	New Wrk		02/01/2001	Mark Heier	Mark.Heier@state.sd.u	M Hirad		C M & P
239	In Next Bui	Install application convienence	Desirable		05/15/2001	Fred Leetch	Fred.Leetch@state.sd.	M Hirad	05/30/2000	C M & P
182	On Hold	Cannot Final a CCO W/out Vis Insp	New Wrk	3	05/10/2000	M Hirad	john.jund@state.sd.us	M Hirad	05/30/2000	C M & P
176	Ready Syst	New Report - Contract Status	New Wrk	1	05/05/2000	Mark Heier	Mark.Heier@state.sd.u	M Hirad	05/30/2000	C M & P
214	Open	WPR and Day Count Report	New Wrk		09/28/2000	Mark Heier	Mark.Heier@state.sd.u	M Hirad		

2. Click on the **Create a Problem Report Button** on the Problem Reports Toolbar.

   The Create a New Problem Report Window appears as shown below with information supplied for the **Submitted By** and **Email Address** fields.



3. Review and edit this supplied information as needed.

4. Enter information by choosing from the dropdown listings for the **Application** and **Severity of Work** fields.

5. Enter information in the **Problem Title** and **Description** fields as completely and accurately as possible. Include any ID numbers indicating where the trouble was encountered (pay item, install item, etc.). Give an account of events preceding the problem with any significant details.

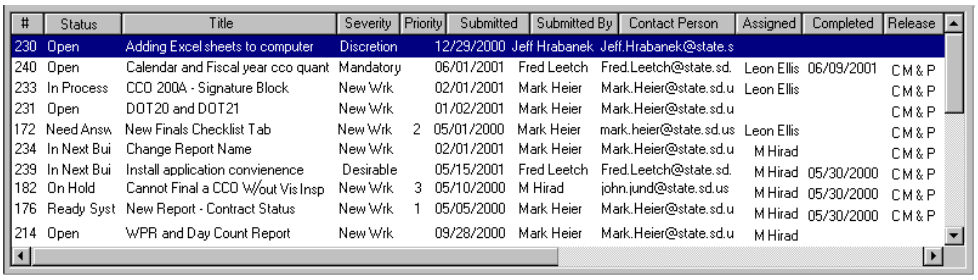
6. Click on the **OK Button** OK located at the bottom of the window.

Edit a Problem Report

To edit a problem report, perform the following steps.

1. Select the Problem Reports option from the Help menu on the Frame Menu Bar.

   The Problem Reports Window appears as shown below.



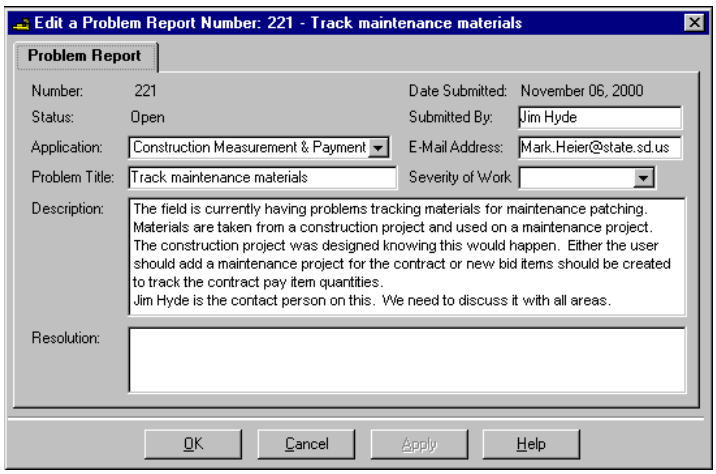
#	Status	Title	Severity	Priority	Submitted	Submitted By	Contact Person	Assigned	Completed	Release
230	Open	Adding Excel sheets to computer	Discretion		12/29/2000	Jeff Hrabanek	Jeff.Hrabanek@state.s			
240	Open	Calendar and Fiscal year cco quant	Mandatory		06/01/2001	Fred Leetch	Fred.Leetch@state.sd.	Leon Ellis	06/09/2001	C M & P
233	In Process	CCO 200A - Signature Block	New Wrk		02/01/2001	Mark Heier	Mark.Heier@state.sd.u	Leon Ellis		C M & P
231	Open	DOT20 and DOT21	New Wrk		01/02/2001	Mark Heier	Mark.Heier@state.sd.u			C M & P
172	Need Answ	New Finals Checklist Tab	New Wrk	2	05/01/2000	Mark Heier	mark.heier@state.sd.us	Leon Ellis		C M & P
234	In Next Bui	Change Report Name	New Wrk		02/01/2001	Mark Heier	Mark.Heier@state.sd.u	M Hirad		C M & P
239	In Next Bui	Install application convienence	Desirable		05/15/2001	Fred Leetch	Fred.Leetch@state.sd.	M Hirad	05/30/2000	C M & P
182	On Hold	Cannot Final a CCO W/out Vis Insp	New Wrk	3	05/10/2000	M Hirad	john.jund@state.sd.us	M Hirad	05/30/2000	C M & P
176	Ready Syst	New Report - Contract Status	New Wrk	1	05/05/2000	Mark Heier	Mark.Heier@state.sd.u	M Hirad	05/30/2000	C M & P
214	Open	WPR and Day Count Report	New Wrk		09/28/2000	Mark Heier	Mark.Heier@state.sd.u	M Hirad		

2. Locate the desired problem report, sorting the window's information display by clicking on the title of the desired sorting column as necessary.

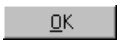
3. Click on the desired **problem report** and click on the **Edit Problem Report Button** on the Problem Reports Toolbar.

   OR Double click on the desired **problem report**.

   The Edit Problem Report Window appears as shown below.



4. Edit the problem report as desired.

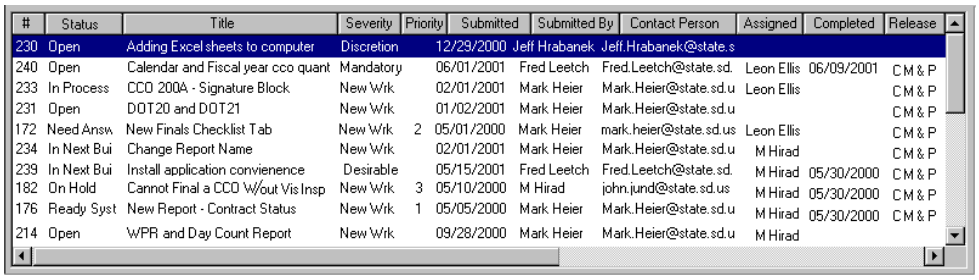
5. Click on the **OK Button**  located at the bottom of the window.

View a Problem Report

To view a problem report, perform the following steps.

1. Select the Problem Reports option from the Help menu on the Frame Menu Bar.

   The Problem Reports Window appears as shown below.



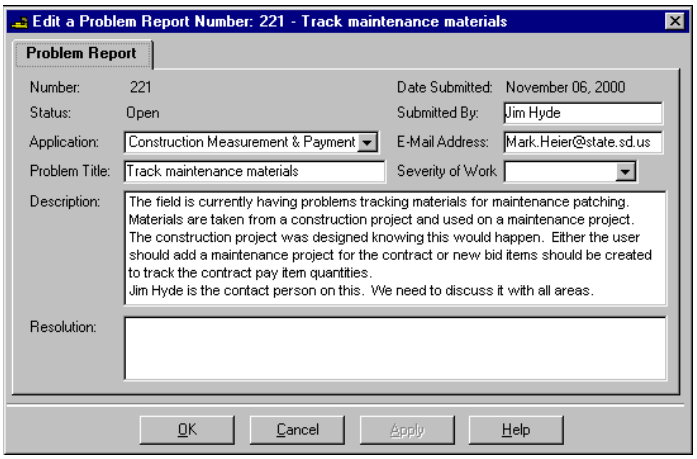
#	Status	Title	Severity	Priority	Submitted	Submitted By	Contact Person	Assigned	Completed	Release
230	Open	Adding Excel sheets to computer	Discretion		12/29/2000	Jeff Hrabanek	Jeff.Hrabanek@state.s			
240	Open	Calendar and Fiscal year cco quant	Mandatory		06/01/2001	Fred Leetch	Fred.Leetch@state.sd.	Leon Ellis	06/09/2001	C M & P
233	In Process	CCO 200A - Signature Block	New Wrk		02/01/2001	Mark Heier	Mark.Heier@state.sd.u	Leon Ellis		C M & P
231	Open	DOT20 and DOT21	New Wrk		01/02/2001	Mark Heier	Mark.Heier@state.sd.u			C M & P
172	Need Answ	New Finals Checklist Tab	New Wrk	2	05/01/2000	Mark Heier	mark.heier@state.sd.us	Leon Ellis		C M & P
234	In Next Bui	Change Report Name	New Wrk		02/01/2001	Mark Heier	Mark.Heier@state.sd.u	M Hirad		C M & P
239	In Next Bui	Install application convienence	Desirable		05/15/2001	Fred Leetch	Fred.Leetch@state.sd.	M Hirad	05/30/2000	C M & P
182	On Hold	Cannot Final a CCO W/out Vis Insp	New Wrk	3	05/10/2000	M Hirad	john.jund@state.sd.us	M Hirad	05/30/2000	C M & P
176	Ready Syst	New Report - Contract Status	New Wrk	1	05/05/2000	Mark Heier	Mark.Heier@state.sd.u	M Hirad	05/30/2000	C M & P
214	Open	WPR and Day Count Report	New Wrk		09/28/2000	Mark Heier	Mark.Heier@state.sd.u	M Hirad		

2. Locate the desired problem report, sorting the window's information display by clicking on the title of the desired sorting column as necessary.

3. Click on the desired **problem report** and click on the **Edit Problem Report Button** on the Problem Reports Toolbar.

   OR Double click on the desired **problem report**.

   The Edit Problem Report Window appears as shown below.



4. View the problem report information as desired.

5. Click on the **Cancel Button** Cancel located at the bottom of the window.

Problem Report Processing Procedure

When a problem is entered in the Problem Report Window's listing, CM&P Production Support first determines whether the CM&P System has a problem or if the difficulty is something that CM&P training and/or a further Help Topic explanation would remove.

If a problem is found to exist in the CM&P System, these steps are followed.

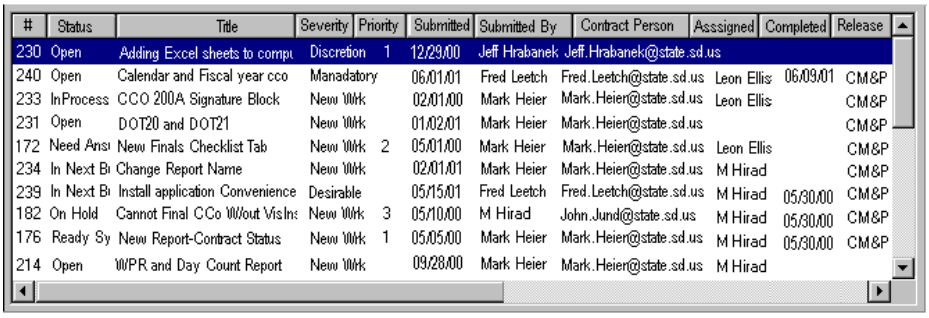
1. The problem is assigned a priority range (High = 1 through Low = 5).
2. The developers determine the length of time needed to fix the problem.
3. Problems will be handled as they are received—but also based on the degree of severity. (For example, something making the Record Work Window completely unavailable would be fixed before something allowing a report to print an extra blank page—even if the second error had been reported before the first.)
4. Any problem that requires considerable development time will be brought to the attention of the DOT Steering Team and the DOT Project Manager. They have the final say as to when a problem gets fixed and their decision will be heavily based on the severity of the problem.
5. Once problems are fixed, the fix will be moved to production at the earliest possible time.
6. The person listed as reporting the problem in the Problem Report Window will be notified upon completion and implementation.
7. If the fix effects all CM&P users, notification about the modification and appropriate instructions will be issued.

Create a Change Request

To create a change request, perform the following steps.

1. Follow the menu path: **Help, Change Requests**.

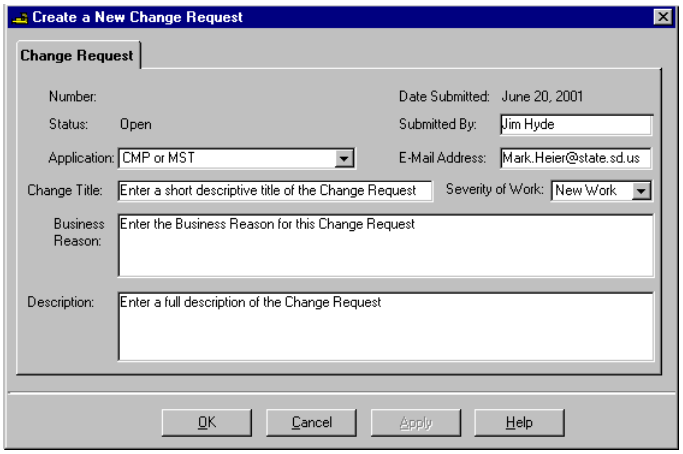
   The Change Requests Window appears as shown below.



#	Status	Title	Severity	Priority	Submitted	Submitted By	Contract Person	Assigned	Completed	Release
230	Open	Adding Excel sheets to compu	Discretion	1	12/29/00	Jeff Hrabanek	Jeff.Hrabanek@state.sd.us			
240	Open	Calendar and Fiscal year cco	Manadatory		06/01/01	Fred Leetch	Fred.Leetch@state.sd.us	Leon Ellis	06/09/01	CM&P
233	InProcess	CCO 200A Signature Block	New Wrk		02/01/00	Mark Heier	Mark.Heier@state.sd.us	Leon Ellis		CM&P
231	Open	DOT20 and DOT21	New Wrk		01/02/01	Mark Heier	Mark.Heier@state.sd.us			CM&P
172	Need Ans	New Finals Checklist Tab	New Wrk	2	05/01/00	Mark Heier	Mark.Heier@state.sd.us	Leon Ellis		CM&P
234	In Next B	Change Report Name	New Wrk		02/01/01	Mark Heier	Mark.Heier@state.sd.us	M Hirad		CM&P
239	In Next B	Install application Convenience	Desirable		05/15/01	Fred Leetch	Fred.Leetch@state.sd.us	M Hirad	05/30/00	CM&P
182	On Hold	Cannot Final CCo W/out Vis Ins	New Wrk	3	05/10/00	M Hirad	John.Jund@state.sd.us	M Hirad	05/30/00	CM&P
176	Ready Sy	New Report-Contract Status	New Wrk	1	05/05/00	Mark Heier	Mark.Heier@state.sd.us	M Hirad	05/30/00	CM&P
214	Open	WPR and Day Count Report	New Wrk		09/28/00	Mark Heier	Mark.Heier@state.sd.us	M Hirad		

2. Click on the **Create a Change Request Button** on the Change Requests Toolbar.

   The Create a Change Request Window appears as shown below with information supplied for the **Submitted By** and **Email Address** fields.



3. Review and edit this supplied information as needed.

4. Enter information by choosing form the dropdown listings for the **Application** and **Severity of Work** fields.

5. Enter information in the **Change Title**, **Business Reason**, and **Description** fields as completely and accurately as possible.

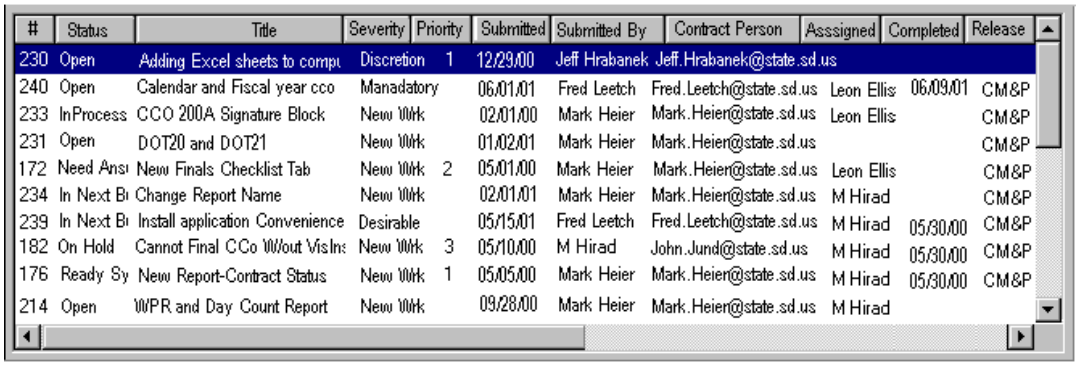
6. Click on the **OK Button** OK located at the bottom of the window.

Edit a Change Request

To edit a change request, perform the following steps.

1. Select the **Change Requests** option from the Help menu on the Frame Menu Bar.

   The Change Requests Window appears as shown below.



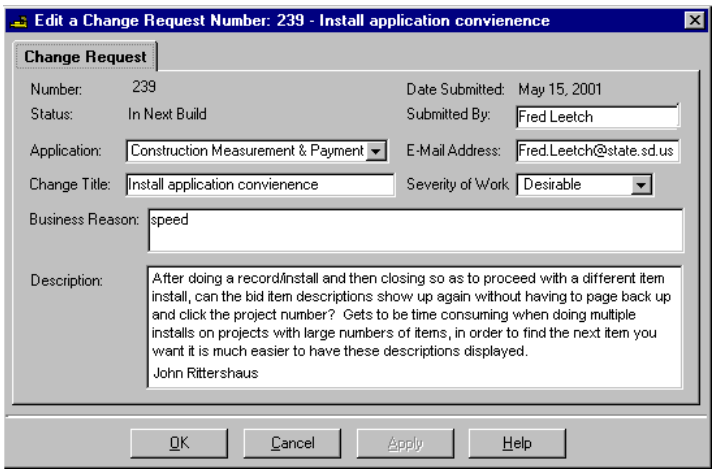
#	Status	Title	Severity	Priority	Submitted	Submitted By	Contract Person	Asssigned	Completed	Release
230	Open	Adding Excel sheets to compu	Discretion	1	12/29/00	Jeff Hrabanek	Jeff.Hrabanek@state.sd.us			
240	Open	Calendar and Fiscal year cco	Manadatory		06/01/01	Fred Leetch	Fred.Leetch@state.sd.us	Leon Ellis	06/09/01	CM&P
233	InProcess	CCO 200A Signature Block	New Wrk		02/01/00	Mark Heier	Mark.Heier@state.sd.us	Leon Ellis		CM&P
231	Open	DOT20 and DOT21	New Wrk		01/02/01	Mark Heier	Mark.Heier@state.sd.us			CM&P
172	Need Ansı	New Finals Checklist Tab	New Wrk	2	05/01/00	Mark Heier	Mark.Heier@state.sd.us	Leon Ellis		CM&P
234	In Next Bı	Change Report Name	New Wrk		02/01/01	Mark Heier	Mark.Heier@state.sd.us	M Hirad		CM&P
239	In Next Bı	Install application Convenience	Desirable		05/15/01	Fred Leetch	Fred.Leetch@state.sd.us	M Hirad	05/30/00	CM&P
182	On Hold	Cannot Final CCo Wout VisIns	New Wrk	3	05/10/00	M Hirad	John.Jund@state.sd.us	M Hirad	05/30/00	CM&P
176	Ready Sy	New Report-Contract Status	New Wrk	1	05/05/00	Mark Heier	Mark.Heier@state.sd.us	M Hirad	05/30/00	CM&P
214	Open	WPR and Day Count Report	New Wrk		09/28/00	Mark Heier	Mark.Heier@state.sd.us	M Hirad		

2. Locate the desired change request, sorting the window's information display by clicking on the title of the desired sorting column as necessary.

3. Click on the desired **change request** and then click on the **Edit a Change Request Button** on the Change Requests Toolbar.

   OR Double click on the desired **change request.**

   The Edit Change Request Window appears as shown below.



4. Edit the change request as desired.

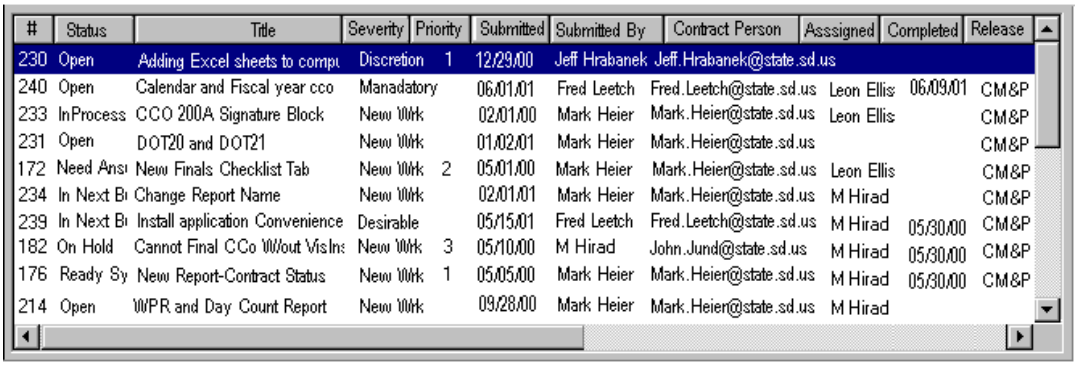
5. Click on the **OK Button** OK located at the bottom of the window.

View a Change Request

To view a change request, perform the following steps.

1. Select the **Change Requests** option from the Help menu on the Frame Menu Bar.

   The Change Requests Window appears as shown below.



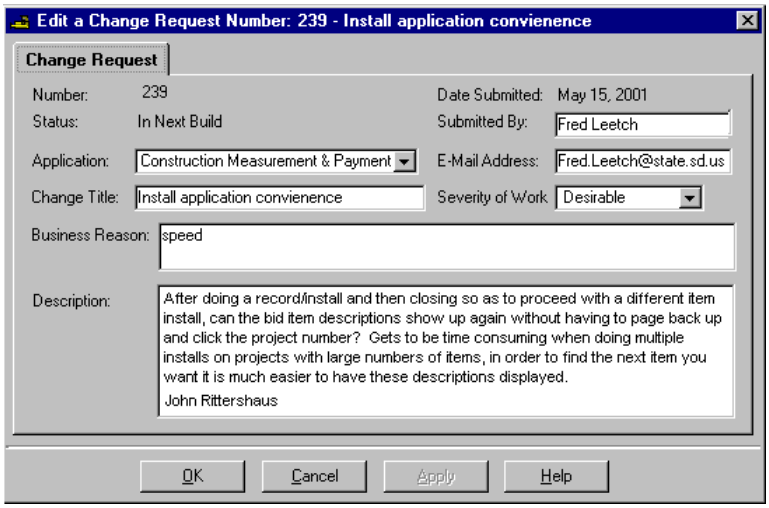
#	Status	Title	Severity	Priority	Submitted	Submitted By	Contract Person	Asssigned	Completed	Release
230	Open	Adding Excel sheets to compu	Discretion	1	12/29/00	Jeff Hrabanek	Jeff.Hrabanek@state.sd.us			
240	Open	Calendar and Fiscal year cco	Manadatory		06/01/01	Fred Leetch	Fred.Leetch@state.sd.us	Leon Ellis	06/09/01	CM&P
233	InProcess	CCO 200A Signature Block	New Wrk		02/01/00	Mark Heier	Mark.Heier@state.sd.us	Leon Ellis		CM&P
231	Open	DOT20 and DOT21	New Wrk		01/02/01	Mark Heier	Mark.Heier@state.sd.us			CM&P
172	Need Ans	New Finals Checklist Tab	New Wrk	2	05/01/00	Mark Heier	Mark.Heier@state.sd.us	Leon Ellis		CM&P
234	In Next B	Change Report Name	New Wrk		02/01/01	Mark Heier	Mark.Heier@state.sd.us	M Hirad		CM&P
239	In Next B	Install application Convenience	Desirable		05/15/01	Fred Leetch	Fred.Leetch@state.sd.us	M Hirad	05/30/00	CM&P
182	On Hold	Cannot Final CCo W/out Vis Ins	New Wrk	3	05/10/00	M Hirad	John.Jund@state.sd.us	M Hirad	05/30/00	CM&P
176	Ready Sy	New Report-Contract Status	New Wrk	1	05/05/00	Mark Heier	Mark.Heier@state.sd.us	M Hirad	05/30/00	CM&P
214	Open	WPR and Day Count Report	New Wrk		09/28/00	Mark Heier	Mark.Heier@state.sd.us	M Hirad		

2. Locate the desired change request, sorting the window's information display by clicking on the title of the desired sorting column as necessary.

3. Click on the desired **change request** and then click on the **Edit a Change Request Button** on the Change Requests Toolbar.

   OR Double click on the desired **change request.**

   The Edit a Change Request Window appears as shown below.



4. View the change request information as desired.

5. Click on the **Cancel Button** Cancel located at the bottom of the window.

Change Request Processing Procedure

When a suggestion is entered in the Change Request Window's listing, developers first determine whether the CM&P System would be improved by the suggested change or if CM&P already has a similar feature.

If an improving change is found to have been suggested for the CM&P System, these steps are followed in a Project Change Log as shown below:

1. The change is assigned a priority range (High = 1 through Low = 5).

2. The developers determine the length of time needed to modify the system.

3. Change requests will be handled as they are received—but also based on the degree of necessity. (For example, a change improving a CM&P function that everyone uses, like the Select a Contract Window, would be completed before a change improving a CM&P function that is less used—even if the second change had been requested before the first.)

4. Any change that requires considerable development time will be brought to the attention of the DOT Steering Team and the DOT Project Manager. They have the final say as to when a modification is made and their decision will be heavily based on the necessity of the change.

5. Once changes are made, they will be moved to production at the earliest possible time.

6. The person listed as requesting the change in the Change Request Window will be notified that it has been made.

7. If the change effects all CM&P users, then everyone will be notified and instructed how to handle the modification.

Project Change Log

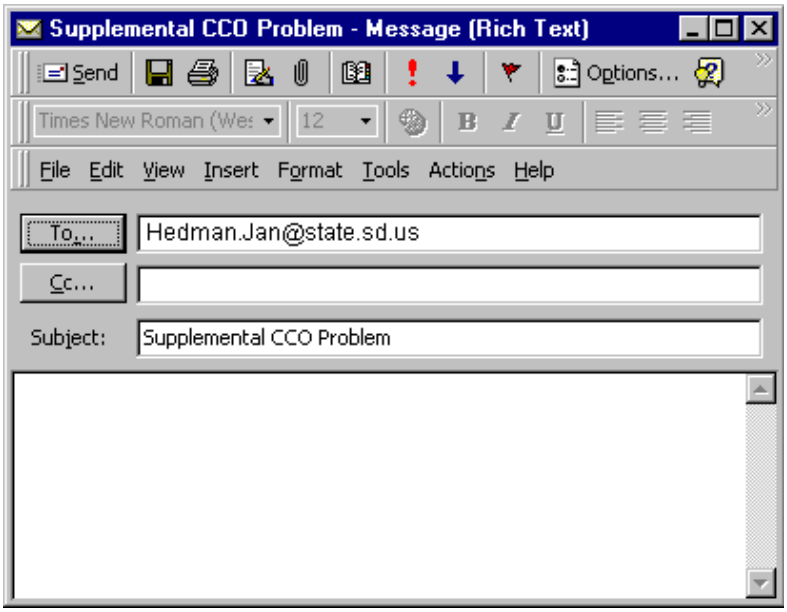
Change #	Status	Priority	Request Date	Requested By	Description of Change	Date Approved	Completion Date	Person Assigned
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								

Email Screen Shots

Users may encounter difficulties that can't be easily explained in a Problem Report Description field. There are times when "a picture is worth a thousand words," especially if the user can explain the actions that led up to the picture when sending it to the Helpdesk.

To email a screen shot with notes, perform the following steps:

1. Decide whether any Error Message is covering up any important part of the screen. If one is, use the mouse to drag it to some less important area.
2. Press the **Print Scrn SysRq Button** at the top right of the computer keyboard.
3. Open **Microsoft Outlook** . (This is the state email system.)
4. Open a new message window by clicking on the **New Message Button** on the toolbar or pressing **Ctrl** + **N**.
5. Enter the email address: i.e. Hedman.Jan@state.sd.us in the **To** field as in the example below.
6. Enter a short description in the **Subject** field as in the example below.



7. Move the cursor to the message area of the window. Then, paste the screen shot into the Email message area by clicking on **Edit** on the menu bar and choosing the **Paste Button** on its drop-down option list or by pressing **Ctrl** + **V**.

8. Type in a description of the problem, including:

   a) Contract/PCEMS Number

   b) Bid Item, Pay Estimate, CCO, Biweekly Progress Report, Contract Issue Spec/Dev, or Work Authorization Number(s) involved (if applicable)

   c) Record Work, Contract Weather Day, or other Dates involved (if applicable)

   d) The steps that led to the problem as far as is known.

   Multiple screen shots and notes may be entered in the same message before emailing it to the CM&P Helpdesk.

9. Press the **Send Button** on the toolbar or press **Ctrl** + **Enter**.

5. Mobile CM&P Functions

Mobile System Logon

Although this process is not part of the CM&P System, for users' convenience these basic instructions are included here. BIT is responsible for the functions described in these instructions.

If problems or changes are encountered in the remote connection process, contact the BIT Help Desk.

To logon to the Mobile CM&P System, perform the following steps.

1. Attach the laptop computer to the telephone line.
2. Start the computer.

   A choice of hardware profiles appears.
3. Select (highlight) **Network** as the hardware profile.

   The Logon Information Window appears.
4. Enter the desired information in the **User Name** and **Password** fields.

   The current desktop appears.
5. Click on the **DAS** icon (or on the **Dial-Up Networking** icon) on the desktop.

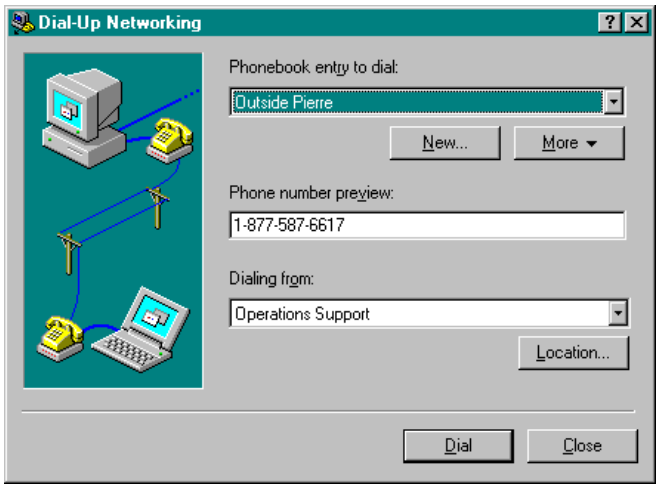
   OR

   From the taskbar's **Start Button** , follow the menu path: **Programs, Accessories, Dial-Up Networking**.

   OR

   Click on the **My Computer** icon on the desktop, then click on the **Dial-Up Networking** icon in the My Computer Window.

The Dial-up Networking Window appears as shown below.

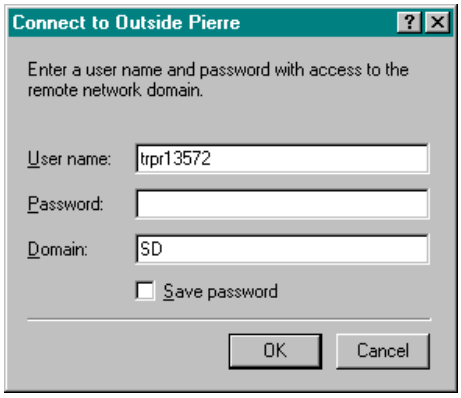


6. Check the information in the **Phonebook entry to dial** field. If necessary, select (highlight) a different choice from the dropdown list.

7. If dialing from a building that requires a preliminary number to get an outside line, enter the appropriate preliminary number, followed by a comma, in front of the number in the **Phone number preview** field.

8. Click on the **Dial Button** Dial.

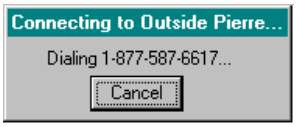
   The Connect Window appears as shown below.



9. Enter the desired information in the **User Name** and **Password** fields.

10. Check that the **Domain** field contains the correct information and click on the **Enter Button.**

    A message appears allowing users to cancel the dial-up procedure if desired as shown below.



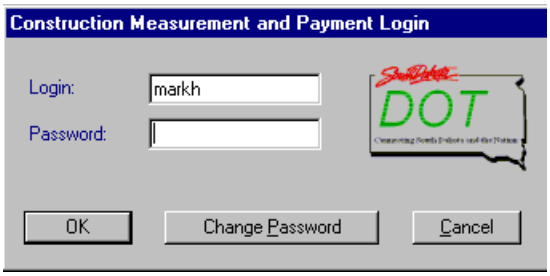
    The current desktop appears.

11. Click on the **Mobile CM&P** icon on the desktop.

    OR

    From the taskbar's **Start Button** , follow the menu path: **Programs, Mobile CM&P, Mobile CM&P**.

    The Construction Measurement & Payment Login Window appears.



12. Enter the desired user name in the **Login:** field.

13. Enter the desired password in the **Password:** field.

14. Click on the **OK Button** .

    The Construction Management and Payment Window appears beneath the Frame Toolbar. All CM&P functions are accessed from this window.

> At the end of the session, if using the telephone line, users *MUST* hang up according to the correct procedure.

Mobile System Hang Up Procedure

Although this process is not part of the CM&P System, for users' convenience these basic instructions are included here. BIT is responsible for the functions described in these instructions.

If problems or changes are encountered in the remote hang up process, contact the BIT Help Desk.

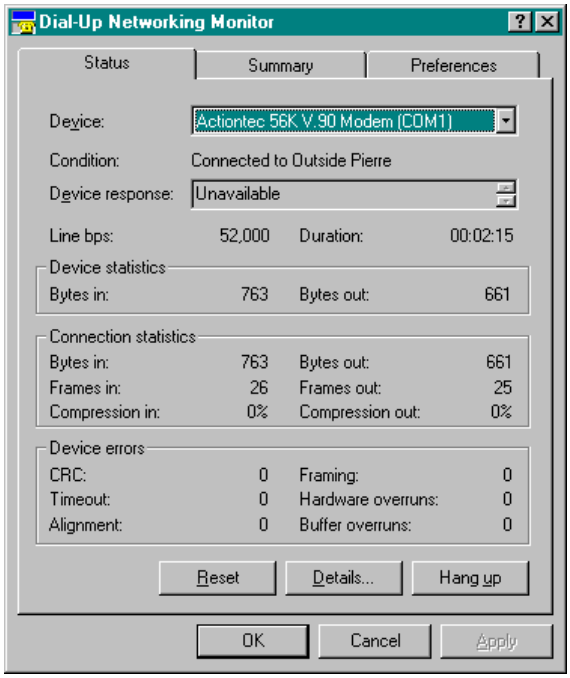
Once a week before hanging up, users may like to synch up with the **Mobile CMS Synchronizer** to update the application.

To hang up the modem, perform the following steps.

1. Locate the **Dial-Up Modem** picture in the lower right hand corner of the screen (next to the clock).

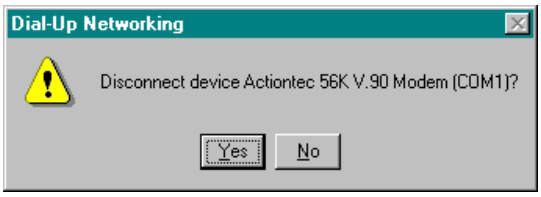
2. Double-click on the **Dial-Up Modem** picture.

   The Dial-Up Networking Monitor Window appears as shown below.



3. Click on the **Hang up Button** [Hang up], then on the **OK Button** [OK].

   A disconnect message appears as in the example below.



4. Click on the **Yes Button** [Yes].

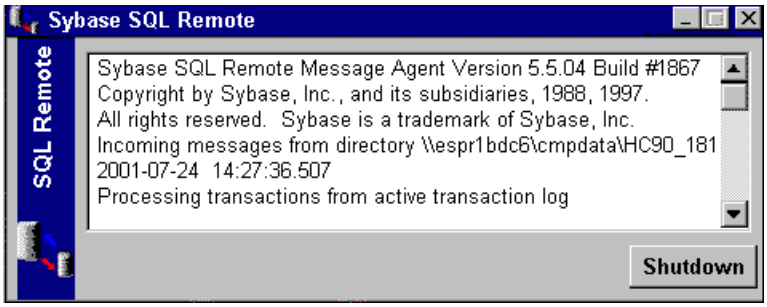
Replication Procedure

This procedure only becomes available to users if the correct database is logged onto, which occurs automatically for laptop computers.

To replicate data for a laptop computer after logging on remotely, perform the following steps.

1. Close any open windows.
2. Follow the menu path: **Tools, Replicate Data.**

   The replication process starts as seen in the example below.



3. Wait for a message indicating that replication is completed.
4. Once a week at some time during the mobile session, or at the end of the mobile session, use the Mobile CMS Synchronizer to update the application.

   Replicated information becomes available after the top of the hour. It is best to replicate near the end of the hour.

Use the Mobile CMS Synchronizer

To use the Mobile CMS Synchronizer, the laptop computer must be connected through the telephone line or network drop.

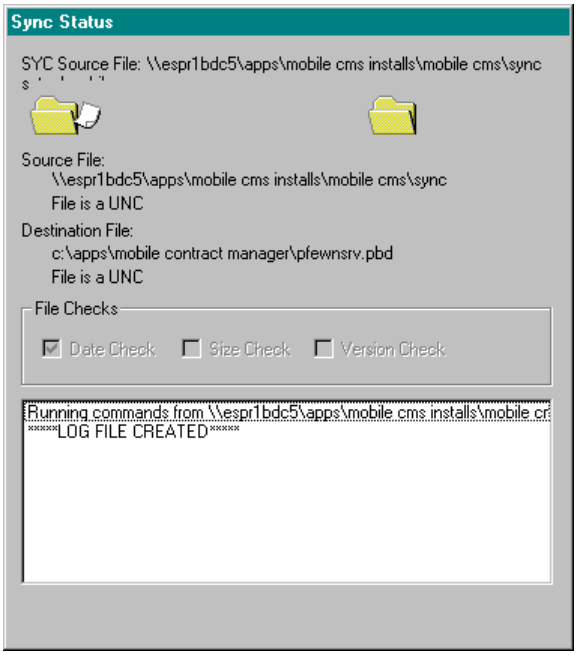
To use the Mobile CMS Synchronizer, perform the following steps.

1. Click on the **Mobile CMS Synchronizer** icon on the desktop.

   OR

   From the taskbar's **Start Button** follow the menu path: **Programs, Mobile Contract Manager, Mobile CMS Synchronizer**.

   The Synch Status Window appears, as shown below, and the synchronization process begins. (Depending on how often this is done, it may take half an hour or longer.)



It is recommended that the Mobile CMS Synchronizer be used once a week.

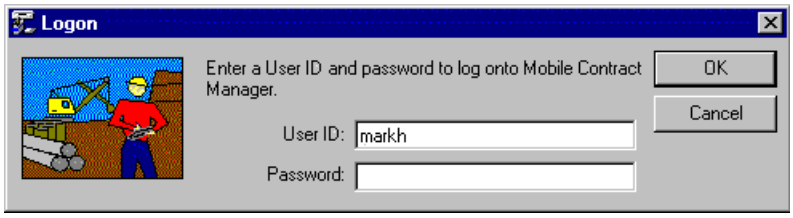
Download Procedure with Contract Manager Application

At the beginning of a project, the project needs to be downloaded onto the laptop that will be used remotely to record contract data. This procedure is accomplished with the Contract Manager Application. To add a contract to a laptop, perform the following steps:

1. Double click on the **Mobile Contract Manager Icon**

on the desktop.

   The Mobile Contract Manager Logon Window displays as shown below.

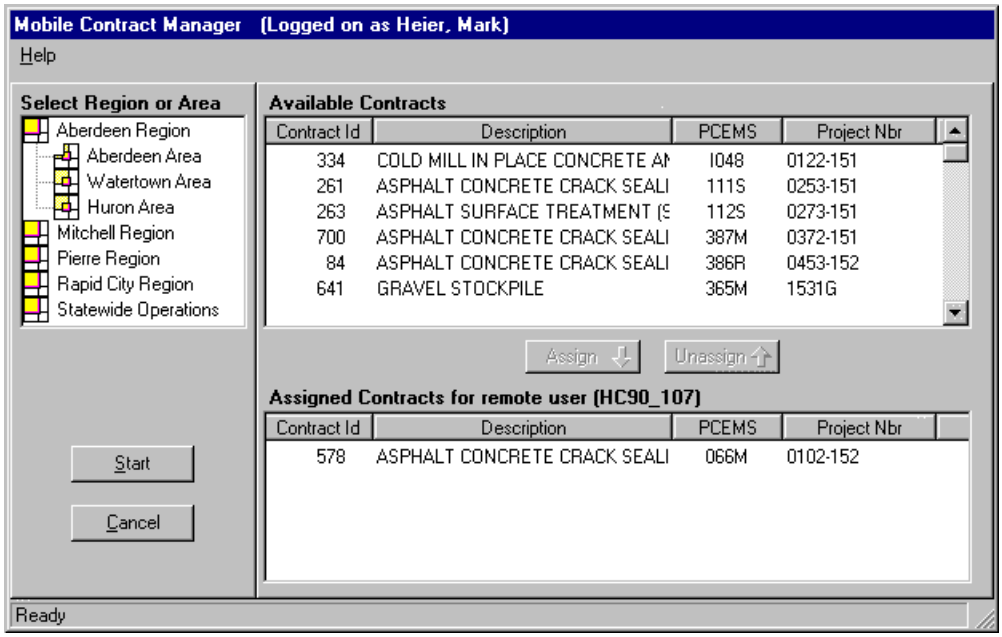


2. Enter the appropriate data in the **User ID** and **Password** fields.

3. Click on the **OK Button**

.

   The Mobile Contract Manager Window displays as shown below.



4. Find the desired contract to add, either geographically as in the Select a Contract Window, or by sorting the list panel according to any of the informational columns by clicking on that column's title.

5. Select (highlight) the desired contract to add.

6. Click on the **Assign Button** [Assign].

7. Repeat steps 4-6 as desired to add further contracts.

8. Click on the **Start Button** [Start].

   The Contract Manager application performs a download of the selected contract(s) displaying message boxes as appropriate. (Click on the **OK Button** [OK] for each.)

9. When the Process Completed Successfully message box is displayed as in the example below, click on the **OK Button** [OK] to exit the Contract Manager application.

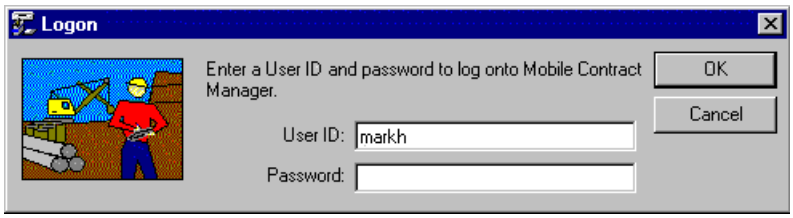
Contract Deletion Procedure with Contract Manager Application

At the end of a project, the project needs to be deleted from the laptop that was used remotely to record contract data. This procedure is accomplished with the Contract Manager Application. To delete a contract to a laptop, perform the following steps:

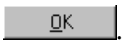
1. Double click on the **Mobile Contract Manager Icon**

on the desktop.

   The Mobile Contract Manager Logon Window displays as shown below.

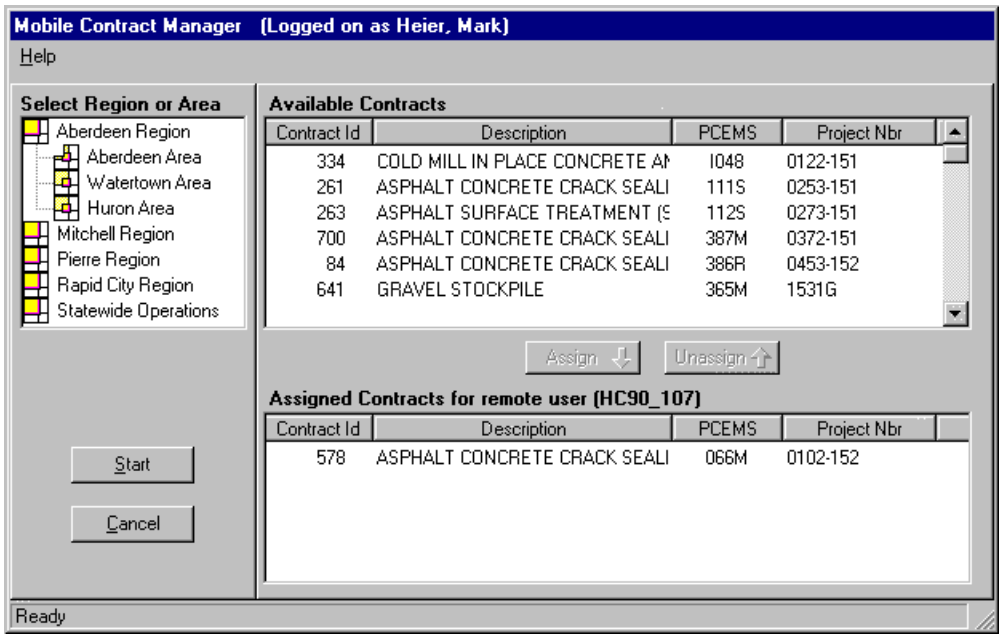


2. Enter the appropriate data in the **User ID** and **Password** fields.

3. Click on the **OK Button** 

.

   The Mobile Contract Manager Window displays as shown below.



4. Find the desired contract to delete (sorting the list panel according to any of the informational columns by clicking on that column's title, if necessary).

5. Select (highlight) the desired contract to delete.

6. Click on the **Unassign Button** Unassign.

7. Repeat steps 4-6 as desired to delete further contracts.

8. Click on the **Start Button** Start.

   The Contract Manager application performs a deletion of the selected contract(s) displaying message boxes as appropriate. (Click on the **OK Button** OK for each.)

10. When the Process Completed Successfully message box is displayed as in the example below, click on the **OK Button** OK to exit the Contract Manager application.

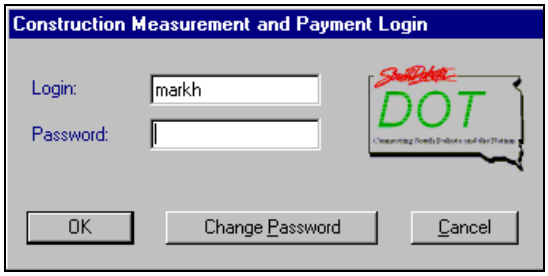
6. Application Entry Functions

System Logon

To logon to the Construction Management and Payment (CM&P) System, perform the following steps.

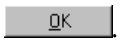
1. From the current desktop, click on the **CM&P Icon**
.

   The Construction Measurement & Payment Login Window displays as shown below.



2. Enter the desired user name in the **Login:** field.

3. Enter the desired password in the **Password:** field.

4. Click on the **OK Button** 
.

   The Construction Management and Payment Window appears beneath the Frame bar toolbar. All CM&P system functions are accessed from this window.

Logoff Procedure

To logoff of the CM&P system, perform the following steps:

1. Save all work.

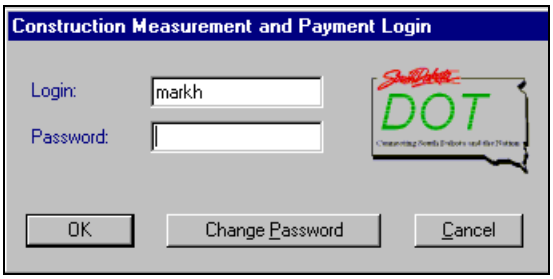
2. Click on the **Exit Button** or click on the **Close Button** in the upper right corner to close the Construction Management and Payment Window.

Change Password Procedure

To change a password on the CM&P system, perform the following steps.

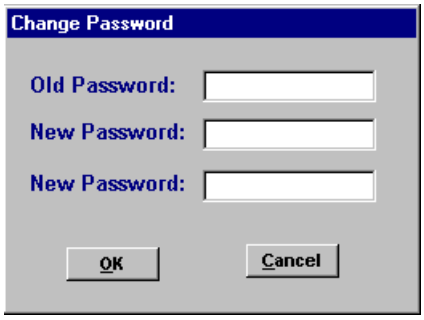
1. From the current desktop, click on the **CM&P Icon**
.

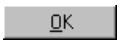
2. The Construction Measurement & Payment Login Window appears as shown below.



3. Click on the **Change Password Button**
.

   The Change Password Window appears as shown below.



4. Enter the old password in the **Old Password:** field.
5. Enter the new password in the first **New Password:** field.
6. Enter the new password in the second **New Password:** field.
7. Click on the **OK Button** 

to complete the procedure.

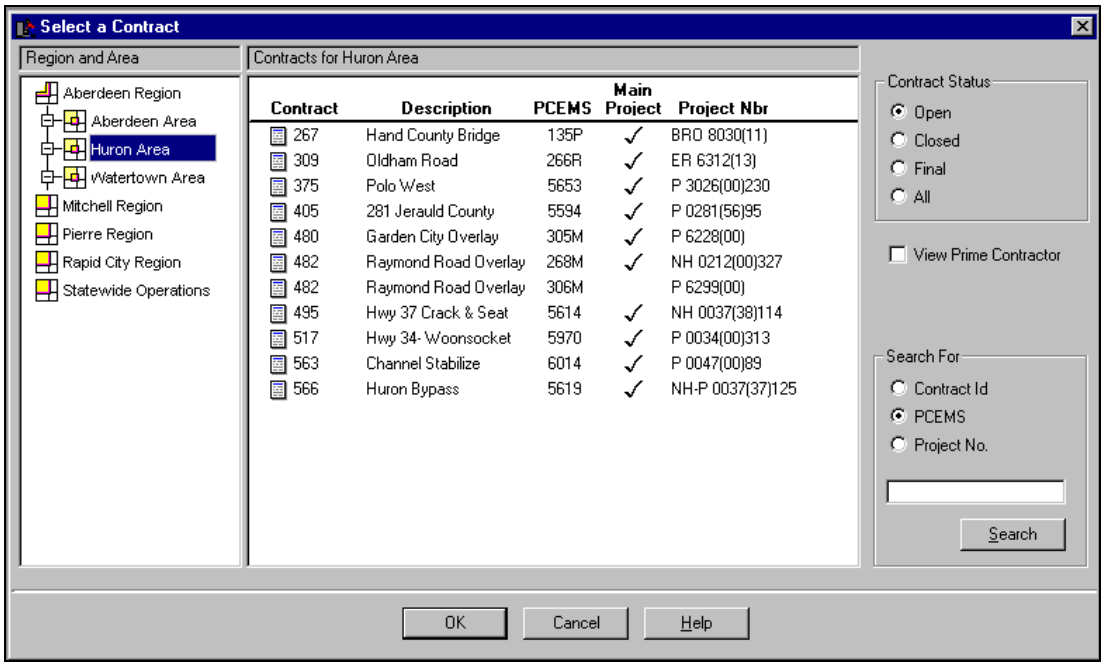
7. Locate Desired Work Procedures

Select Contract Procedure

To select a contract on the CM&P system, perform the following steps.

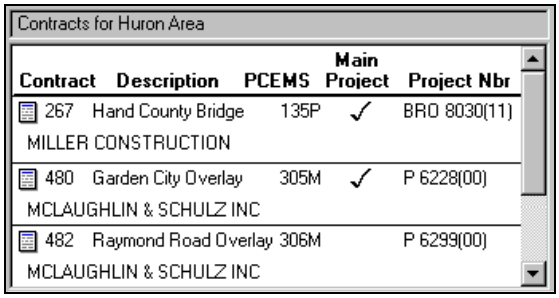
1. Click on the **Select a Contract Button** on the Frame toolbar.

   The Select a Contract Window appears as shown below.



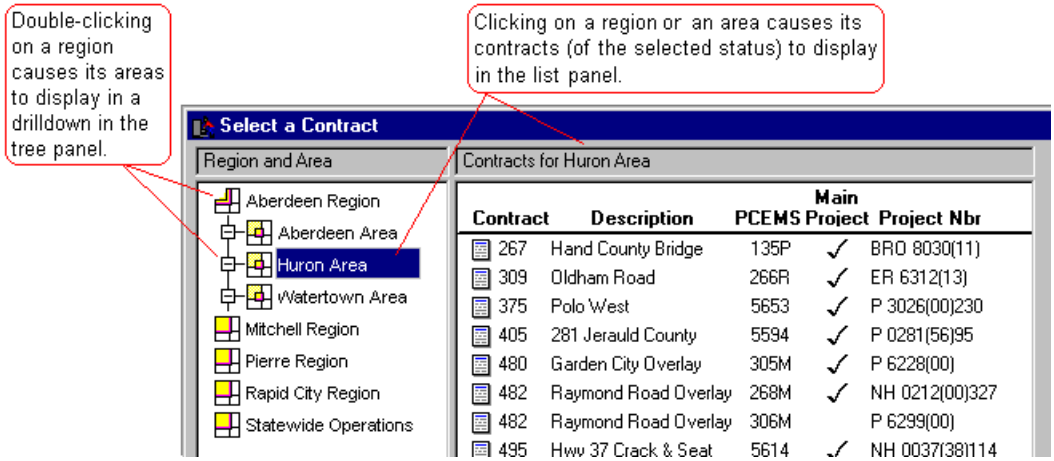
2. Use the **Contract Status** radio buttons to specify the type of contract (Open, Closed, Final, or All) to be displayed in the window.

3. If necessary, use the **View Prime Contractor** checkbox to display the names of the prime contractors associated with the displayed contracts. Marking this checkbox causes CM&P to display the designated contracts along with their prime contractor information in the list panel as shown in the example below.



4. Click on the appropriate **Region** (or double click on a region to display that region's areas, then click on the appropriate **Area**).

   The contracts for the selected Region or Area are displayed in the list panel as in the example below.



5. Locate the desired contract.

6. Once the desired contract is located in the list panel, click on the desired **contract**.

7. Click on the **OK Button** [OK] located at the bottom of the window.

   The CM&P System accesses the selected contract, the Select a Contract Window closes, and the user may begin work with the CM&P System.

> For steps 2-5, using the search panel will also locate the desired contract. Refer to **Search for a Contract** for more information if desired.

Search for a Contract

Users can locate a particular contract in the CM&P System through the use of the Search For section of the Select a Contract Window. This search utility, located in the lower right portion of the Select a Contract Window, enables users to search for a contract based on Contract ID, PCEMS Nbr, or Project Nbr. The steps below detail the process of searching for a contract.

1. Click on the **Select a Contract Button** .

2. The Select a Contract Window appears.

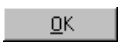
3. Select the **criteria** (i.e., Contract ID, PCEMS Nbr) to be searched.

   In the blank field, enter the value that is to be found.

4. Click on the **Search Button** .

   The CM&P System performs a search for the information requested and displays any result(s) in the list panel.

5. Click on the desired **contract**.

6. Click on the **OK Button**  located at the bottom of the window.

   The CM&P System accesses the selected contract, the Select a Contract Window closes, and the user may begin work with the CM&P System.

8. Manage Contract Window

The Manage Contract Window is reached through the **Manage Contract Button** on the Frame bar Toolbar or through the menu path: **Goto, Manage Contract**. Within this window, users can set up a contract and edit contract information. Using buttons on the Manage Contract Toolbar shown below, users can add, edit, or delete a project. They can edit or close pay items. They can edit subcontractor data, manage contract days, set up contract phases and create a contract log entry.

The **Print Button** allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **Save Button** records all of the work entered since the last save command was entered. Users should save information frequently. Only saving before closing the window will allow the changes to enter the CM&P System.

The **Edit/View Project Button** allows users to add, change, and delete projects associated with each contract.

The **Close Pay Items Button** allows users to close pay items, as well as add, edit, or delete pay items in contract set up.

The **Edit/View Subcontractor Button** allows users to view the percentage of the work that has been sublet to each subcontractor and to record the necessary Equal Employment Opportunity (EEO) information from each subcontractor.

The **Contract Days Button** allows users to establish or change the first and last calendar dates for work on the contract.

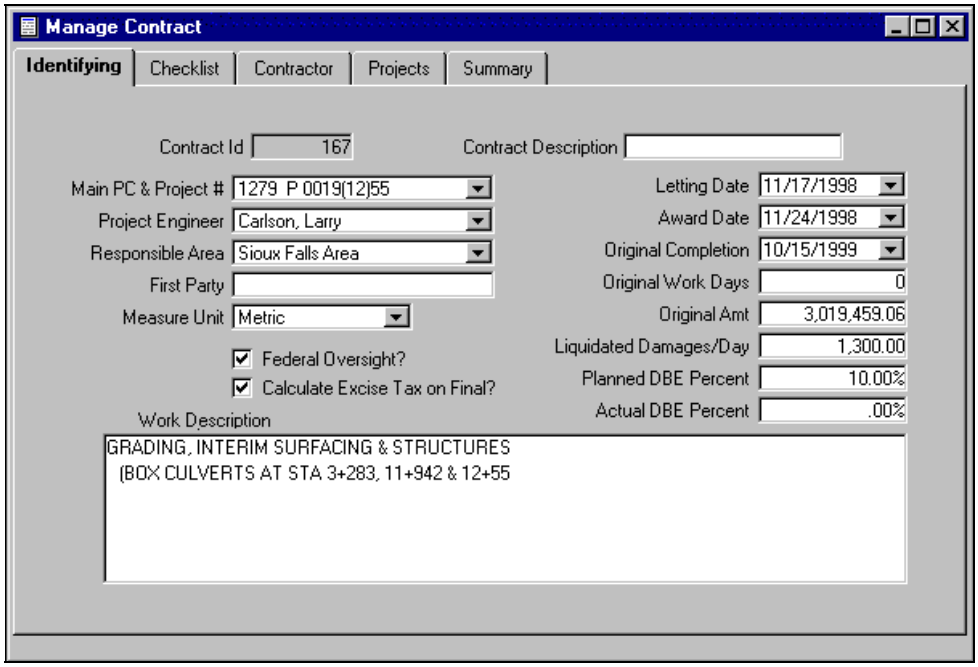
The **Contract Phases Button** allows users to divide a contract into several measurable groups based on date ranges, or edit or delete phase divisions.

The **Contract Log Button** opens the Contract Log Window, in which users can record and edit important information about the contract.

The **Help Button** allows users to retrieve help from the application's online help file. If the specific information required is not supplied immediately, try searching the Help Topics panel to the left of the main Help panel.

The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.

Identifying Tab



The **Contract Identification** field contains the number assigned to the contract and cannot be edited.

The **Contract Description** field contains information that displays in the Select a Contract Window and helps users locate their contracts more quickly. Enter information from the DOT 123 or a useful description.

The **Main PC & Project Number** field contains the PCEMS (Pre-construction Engineering Management System) number and the project number for the main project within the contract. Enter information from the DOT 123.

The **Project Engineer** field contains the name of the project engineer assigned to and responsible for the contract and is filled by the area office.

The **Responsible Area** field contains the area office that is responsible for the contract. For informal contracts, the field enters this information from the DOT 123.

The **First Party** field contains the name of the entity that receives support or assistance from the Department of Transportation. For informal contracts, the field enters this information from the DOT 123.

The **Measure Unit** field contains the unit of measure that is to be used on the contract. For informal contracts, the field enters this information based on the bid item numbers from the DOT 123.

The **Federal Oversight?** checkbox is marked when the contract receives federal oversight. For informal contracts, either the field or central office enters this information from the DOT 123.

Checking the **Calculate Excise Tax on Final?** checkbox will cause CM&P to automatically calculate excise tax and add it as a line item for the final CCO (and any supplemental CCO's). It is checked by default. Users who don't want the final or supplemental CCO's to have excise tax added as a line item should click on the checkbox, thus removing the checkmark.

Selections of **Stockpile** or **Work in Progress** for the **Project Type** field on the Add New Contract **Project Tab** will cause CM&P to automatically uncheck the **Calculate Excise Tax on Final?** checkbox. However, users who want the excise tax calculated and added as a line item on the final and any supplemental CCO's for these types of contracts may then go back and over-ride it (rechecking the checkbox).

The **Letting Date** field contains the date the contract was let. For informal contracts, the field enters this information from the DOT 123.

The **Award Date** field contains the date that the contract was awarded to the contractor. For informal contracts, the field enters this information from the Notice to Proceed Letter.

The **Original Completion** field contains the date that work on a completion date contract is to be finished. For informal contracts, the field enters this information from the DOT 123.

The **Original Work Days** field contains the number of working days called for in a working day contract. For informal contracts, the field enters this information from the DOT 123.

The **Original Amount** field contains the dollar amount agreed upon in the contract. For informal contracts, the field enters this information from the DOT 123.

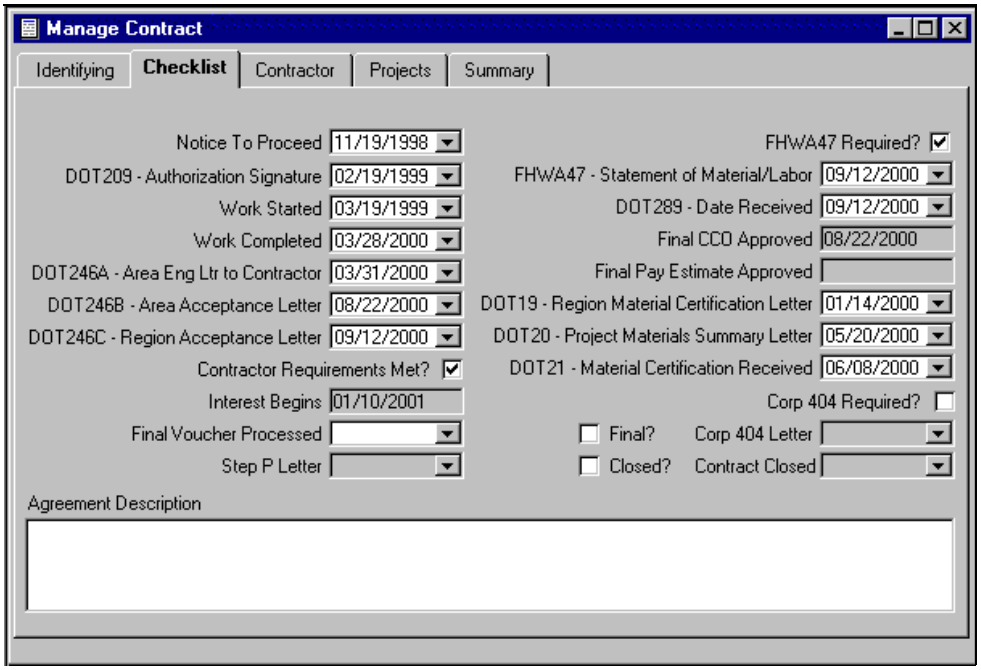
The **Liquidated Damages per Day** field contains the dollar amount that is to be used when computing liquidated damages for the contract. The area office enters this information from the spec book or the special provisions.

The **Actual DBE (Disadvantaged Business Entities) Percentage** field contains the percentage of the contract that is actually comprised of DBE's. This information is entered by the central office.

The **Planned DBE (Disadvantaged Business Entities) Percentage** field contains the original percentage of the contract that is designated for DBE's. This information is entered by the central office.

The **Work Description** field contains a description of the work location and the work that is to be performed as called for in the contract. For informal contracts, the field enters this information from the DOT 123.

Checklist Tab



The **Notice to Proceed** field contains the date that work on the contract is scheduled to begin and is entered by the project engineer from the carbon copy received when the contractor was sent the original by operations support.

The **DOT 209 – Authorization Signature** field contains the date the project engineer received the DOT 209 (usually at the pre-con meeting) and is entered by the project engineer.

The **Work Started** field contains the date that the contractor begins work on the contract (which should match the date of the first WPR) and is filled by the project engineer.

The **Work Completed** field contains the date that the contractor completes work on the contract (which should match the date of the last WPR) and is filled by the project engineer.

The **DOT 246A – Area Engineer Letter to Contractor** field contains the date that the area engineer sent the DOT 246A Letter to the contractor and is filled by the project engineer.

The **DOT 246B – Area Acceptance Letter** field contains the date that the Area Acceptance Letter was sent to the Region and is filled by the project engineer.

The **DOT 246C – Region Acceptance Letter** field contains the date that the region engineer sent the Region Acceptance Letter to the contractor and is filled by the region engineer.

The **Contractor Requirements Met?** checkbox is checked by finance when the contractor meets the contract requirements.

The **Interest Begins** field contains a date calculated by the CM&P System to be 120 days after the Region Acceptance Letter date.

The **Final Voucher Processed** field contains the date the state submits the request to cut the check for final payment and is filled by finance.

The **Step P Letter** field contains the date the state sent the Step P Letter for contracts whose main project is participating and is filled by operations support.

The **FHWA47 Required?** checkbox must be checked for contracts requiring federal oversight and may be checked for other contracts as needed and is checked by the project engineer or operations support based on review of the published FHWA47 requirements.

The **FHWA47 – Statement of Material/Labor** field must contain the date of the FHWA47 - Statement of Material/Labor for any contract with a checkmark in the **FHWA47 Required?** checkbox. This field is filled by the project engineer once the form is received from the contractor at the conclusion of the project.

The **DOT 289 Date Received** field contains the date the project engineer received the DOT 289 for Actual DBE Participation and is filled by the project engineer.

The **Final CCO Approved** field contains the date the final contract change order was approved and is filled automatically when the **Approved?** checkbox is marked on the Change Order Maintenance Window.

The **Final Pay Estimate Approved** field contains the date the final pay estimate was approved and is filled automatically when the **Approved?** checkbox is marked on the Pay Estimate Maintenance Window.

The **DOT 19 – Region Material Certification Letter** field contains the date of the Region Material Certification Letter and can be filled by either the region materials engineer or the project engineer.

The **DOT 20 – Project Materials Summary Letter** field contains the date of the Project Materials Summary Letter and can be filled by either the certifications engineer or the project engineer.

The **DOT 21 – Material Certification Received** field contains the date of the Final Materials Certification Letter certifying both the materials (as incorporated in the project) and the construction operations (as controlled by sampling and testing.) This field is filled by the project engineer when the carbon copy is received.

The **Corp 404 Required?** checkbox is marked when a Corp 404 Letter is required in the contract proposal and is filled by either the field or operations support.

The **Corp 404 Letter** field must contain the date of the Corp 404 Letter when the **Corp 404 Required?** checkbox is marked and is filled by either the field or operations support.

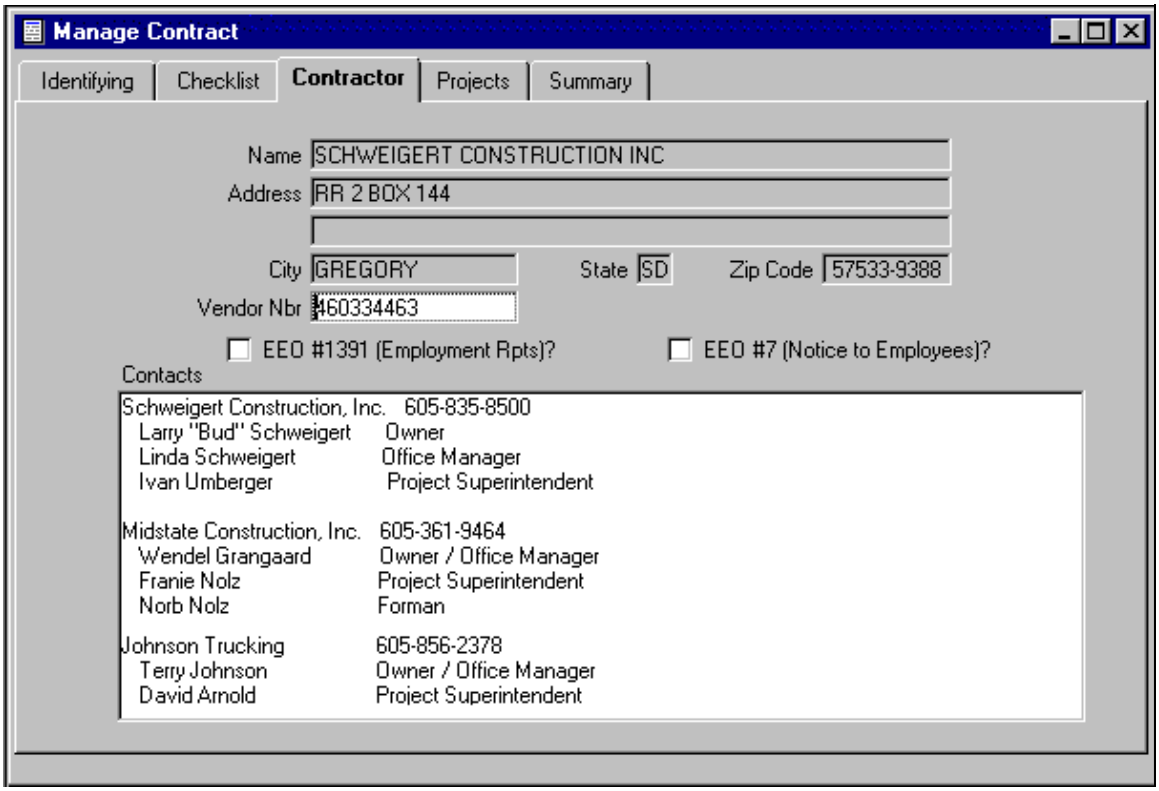
The **Final?** checkbox is marked by finance when a contract is finalled.

The **Closed?** checkbox is marked by finance when the contract is closed.

The **Contract Closed** field contains the date that the contract was closed and is filled by finance.

The **Agreement Description** field allows users to enter general notes or particulars of the contract agreement for reference.

Contractor Tab



The **Contractor Information** fields contain the mailing information (name, address, city, state, and zip code) of the contractor awarded the contract.

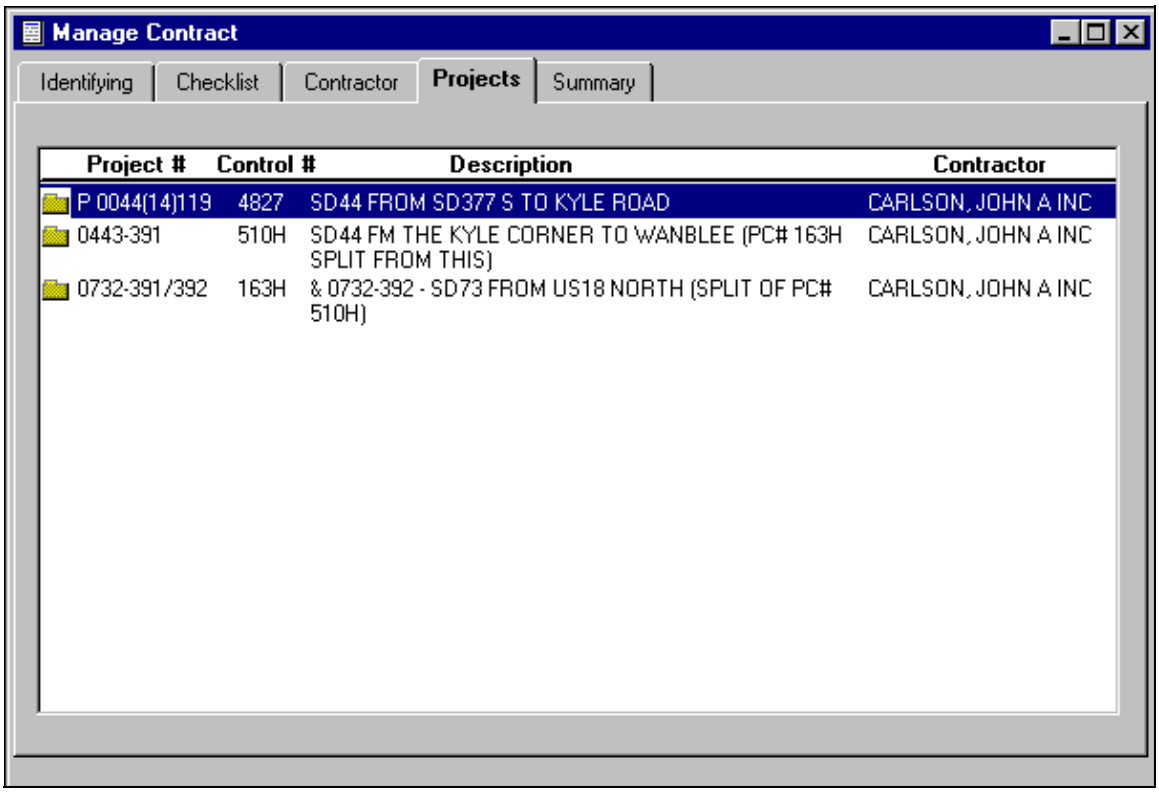
The **Vendor Number** field contains the contractor's vendor number.

The **EEO #1393 (Employment Reports)?** checkbox is marked when the contractor is required by law to file Equal Employment Opportunity #1391 reports.

The **EEO #7 (Notice to Employees)?** checkbox is marked when the contractor is required by law to send Equal Employment Opportunity #7 letters to employees.

The **Contacts** field contains information about contacts on the staff of the prime contractor as well as contacts on the staff of the subcontractors involved in the contract work.

Projects Tab



This tab displays the projects associated with the current contract. Selecting (highlighting) a project on this tab and using the **Enter** key will open the Project Maintenance Window. Double clicking on a project will also open this window.

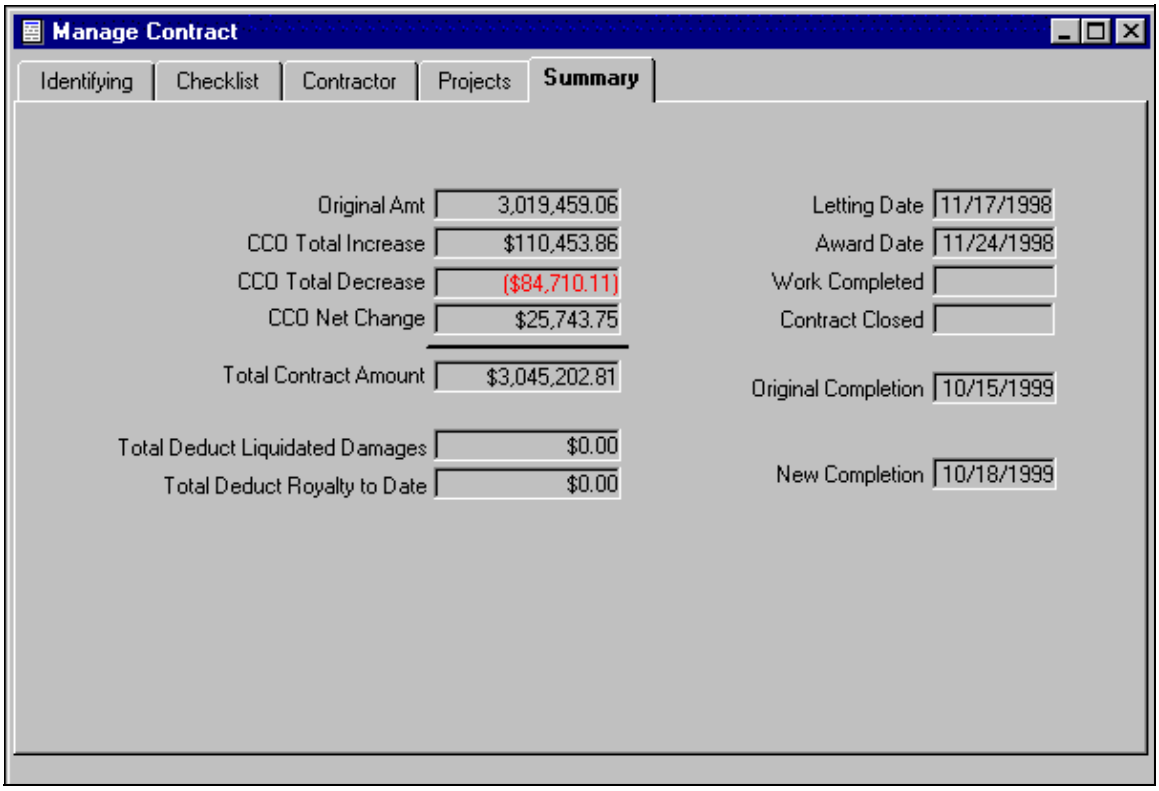
The **Project Number** field contains the identifying number for the project, comprised of multiple character combinations that indicate such information as prefix, highway number, route number, and agreement number.

The **Control Number** field contains the PCEMS (Pre-Construction Engineering Management System) numbers for any projects displayed.

The **Description** field contains specific work location descriptions for projects displayed for the contract.

The **Contractor** field contains the names of the contractors awarded the projects displayed.

Summary Tab



The **Original Amount** field contains the original dollar amount of the contract and cannot be edited here. To change this information, refer to the **Identifying Tab** of the Manage Contract Window.

The **CCO Total Increase** field contains the total dollar amount of contract price increases calculated by the CM&P System from information entered in Contract Change Orders and cannot be edited.

The **CCO Total Decrease** field contains the total dollar amount of decreases in contract price calculated by the CM&P System from information entered in contract change orders and cannot be edited.

The **CCO Net Change** field contains the overall dollar amount of change in contract price calculated by the CM&P System from information entered in contract change orders and cannot be edited.

The **Total Contract Amount** field contains the total dollar amount of the contract calculated by the CM&P System from information entered and cannot be edited.

The **Total Deduction of Liquidated Damages** field contains the total dollar amount of deductions made for liquidated damages and cannot be edited.

The **Total Deductions for Royalty to Date** field contains the total dollar amount of royalty deductions made and cannot be edited.

The **Letting Date** field contains the date the contract was let and cannot be edited here. To change this information, refer to the **Identifying Tab** of the Manage Contract Window.

The **Award Date** field contains the date on which the contractor was awarded the contract and cannot be edited here. To change this information, refer to the **Identifying Tab** of the Manage Contract Window.

The **Work Completed** field contains the date on which the contract work was done and cannot be edited here. To change this information, refer to the **Checklist Tab** of the Manage Contract Window.

The **Contract Closed** field contains the date that the contract was officially closed and cannot be edited here. To change this information, refer to the **Checklist Tab** of the Manage Contract Window.

The **Original Completion** field contains the date the work is contracted to be finished and cannot be edited here. To change this information, refer to the **Identifying Tab** of the Manage Contract Window.

The **New Completion** field contains the revised completion date for the contract and cannot be edited.

Set up a Contract

Before the CM&P System can be used on a contract, some key information--including the name of the assigned project engineer, federal participation and oversight, a contract day range and even possibly contract phases--must be entered.

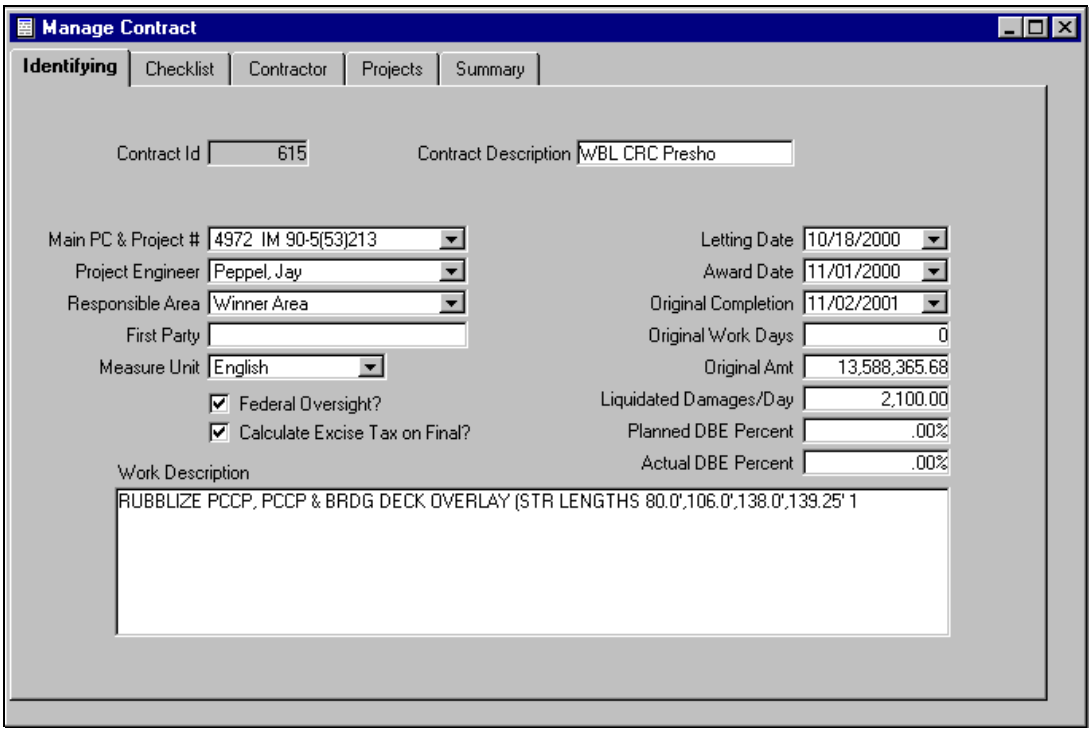
Enter the Name of the Assigned Project Engineer

Users may be asked to assign a project engineer through the Management Notification Window, if this field has not been filled.

To enter the name of the assigned project engineer, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button**.

   The Identifying Tab of the Manage Contract Window appears below the Manage Contract Toolbar as shown below.



2. Select (highlight) the desired name in the **Project Engineer** field's dropdown list.

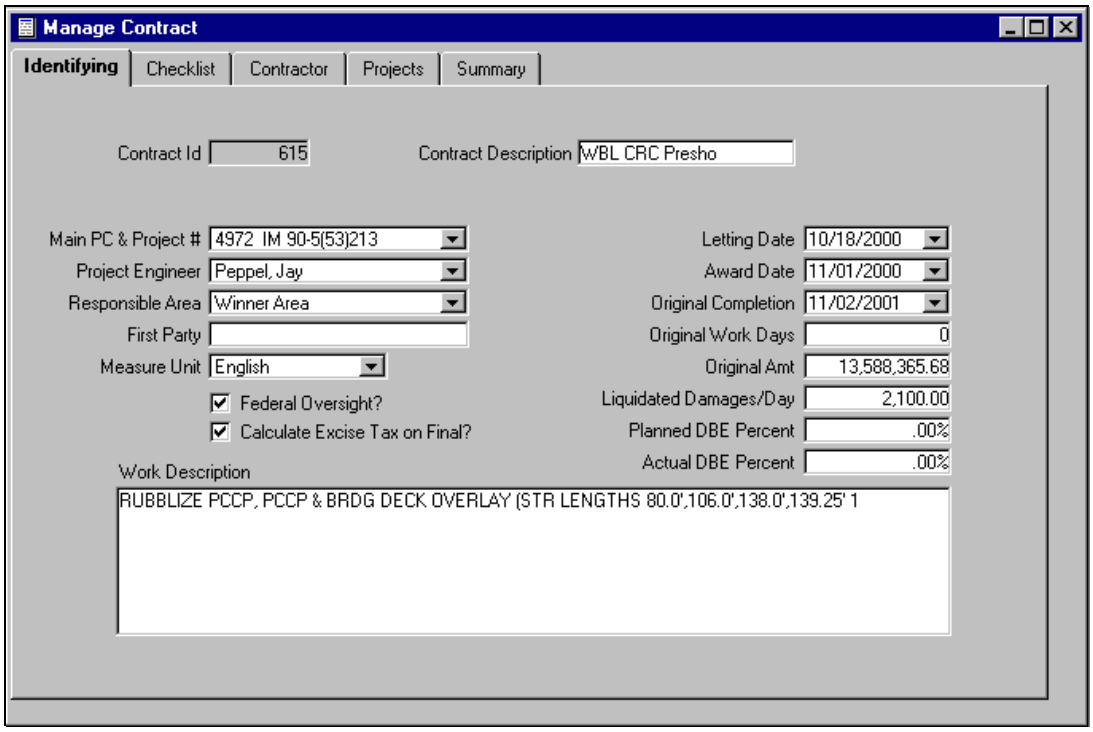
3. Click on the **Save Button**.

Indicate Whether the Contract Will Involve Federal Oversight

To indicate whether the contract will involve federal oversight, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Identifying Tab of the Manage Contract Window appears below the Manage Contract Toolbar as shown below.



2. Click on the **Federal Oversight?** checkbox to indicate that federal oversight <u>will</u> be involved on this contract.

   OR

   To indicate that federal oversight <u>will not</u> be involved on this contract, leave the checkbox empty or deselect the checkbox by clicking on it a second time.

3. Click on the **Save Button** Save.

Indicate Whether a Project Will Involve Federal Participation

To indicate whether a project will involve federal participation, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Identifying Tab of the Manage Contract Window appears below the Manage Contract Toolbar.

2. Click on the **Projects Tab.**

   The Projects Tab of the Manage Contract Window appears below the Manage Contract Toolbar.

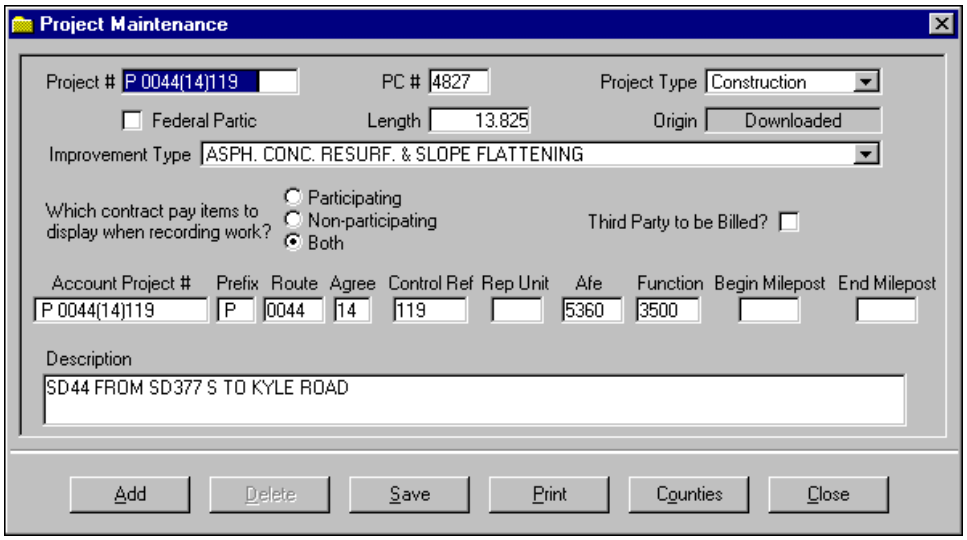
3. Locate the desired project.

4. Select (highlight) the desired project and click on the **Edit/View Projects Button** on the Manage Contract Toolbar.

   OR

   Double click on the desired project.

   The Project Maintenance Window appears as shown below.



5. Click on the **Federal Participation** checkbox to indicate that the current contract will involve federal participation.

   OR

   To indicate that federal participation will not be involved on this contract, leave the checkbox empty or deselect the checkbox by clicking on it a second time.

6. Click on the **Save Button** Save.

7. Repeat steps 3-6 for other projects within the contract as desired.

Specify a Contract Day Range

To specify a contract day range, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Identifying Tab of the Manage Contract Window appears below the Manage Contract Toolbar.

2. Click on the **Manage Contract Days Button** on the Manage Contract Toolbar.

   The Manage Contract Days Window appears as shown below.

3. Select (highlight) the desired dates from the dropdown calendars in the **Begin Date** and **End Date** fields.

4. Click on the **OK Button** .

These two dates define the group of dates available to technicians when entering information in the Contract Weather Day Window.

Set up Contract Phases

> Contract phase setups are required for assessing working days by phase and interim completion dates.

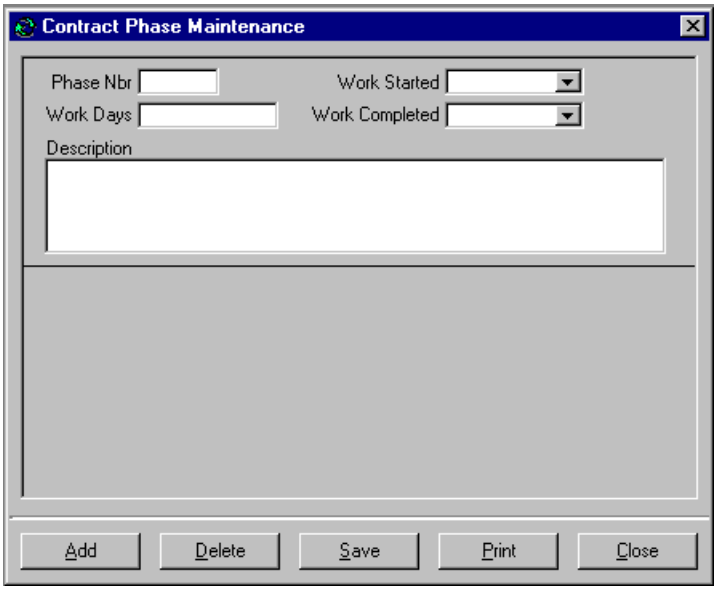
To set up contract phases, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window's Identifying Tab appears below the Manage Contract Window Toolbar.

2. Click on the **Manage Contract Phases Button** .

   The Contract Phase Maintenance Window appears as shown below.



3. Click on the **Add Button** Add at the bottom of the window.
4. Enter the desired numbers in the **Phase Number** and **Work Days** field.
5. Enter the desired information in the **Description** field.
6. Click on the **Save Button** Save.
7. Click on the **Close Button** Close.

Project Procedures

For information about editing a project, refer to **Edit Contract Information**.

Add a Project

To add a project to a contract, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

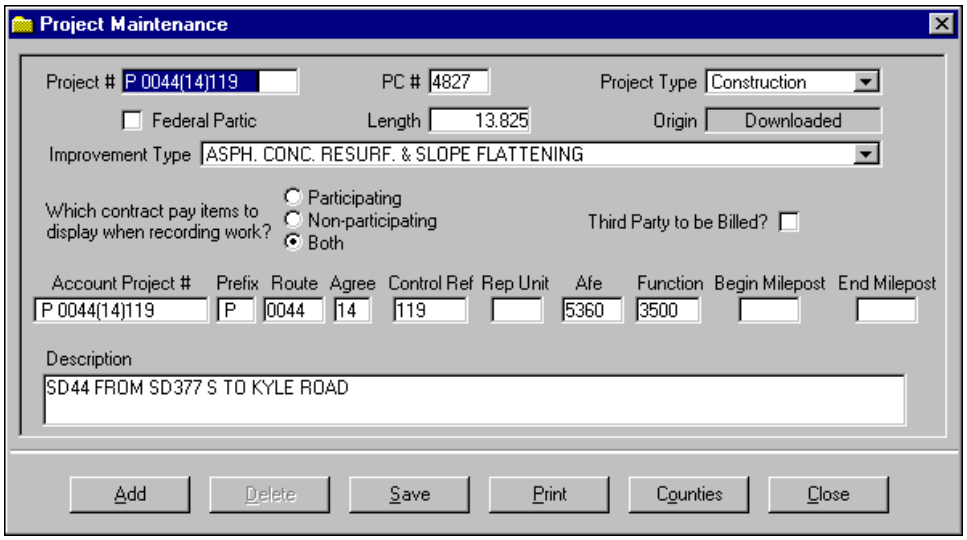
   The Manage Contract Window and toolbar appear.

2. Click on the **Edit-View Project Button** .

   The Project Maintenance Window appears.

3. Click on the **Add Button** at the bottom of the window.

   This clears the contents of the window and allows the input of new information as shown below.



4. Enter the new project number in the **Project Number** field.
5. Enter the PCEMS number in the **PC Number** field.
6. Select the appropriate project type from the **Project Type** field's drop-down list.
7. Select the **Federal Participation** checkbox if there will be federal participation in the new project.
8. Enter the length of the new project in the **Length** field.

9. Select the appropriate improvement type from the **Improvement Type** field's drop-down list

10. Select which items will display in the Record Work Window tree panel from the three radio button choices: **Participating**, **Non-Participating**, or **Both**.

11. Select the **Third Party to be Billed?** checkbox if a county or city ought to be billed by the DOT for something for which the DOT has already paid during the contract.

12. Enter the new project's account number in the **Account Project Number** field.

13. Enter the new project's prefix in the **Prefix** field.

14. Enter the new project's route number in the **Route** field.

15. Enter the new project's agreement number in the **Agree** field.

16. Enter the new project's control reference number in the **Control Ref** field.

17. Enter the new project's reporting unit in the **Reporting Unit** field.

18. Enter the new project's function in the **Function** field.

19. Enter the new project's beginning milepost in the **Begin Milepost Reporting Unit** field as appropriate (usually for maintenance projects).

20. Enter the new project's ending milepost in the **End Milepost** field as appropriate (usually for maintenance projects).

21. Enter a description of the new project in the **Description** field.

22. Click on the **Save Button** [Save] at the bottom of the window.

23. Repeat steps 3-22 as desired for additional contract projects.

24. Click on the **Close Button** [Close] at the bottom of the window.

Associate Counties with a Project

To associate counties with a project, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

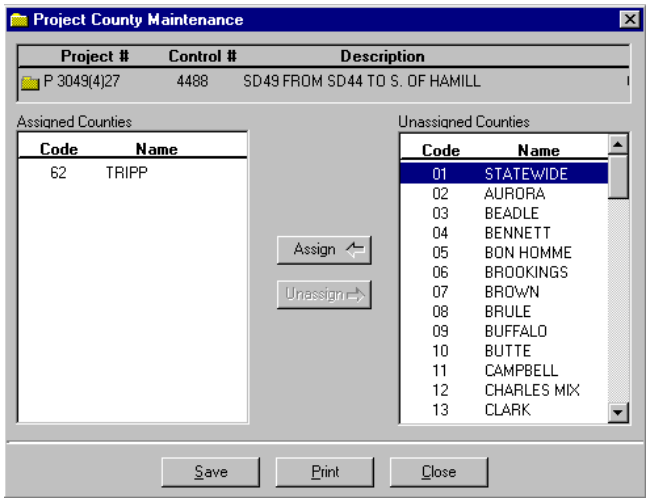
   The Manage Contract Window and toolbar appear.

2. Click on the **Edit/View Project Button** .

   The Project Maintenance Window appears.

3. Click on the **Counties Button** Counties.

   Counties are displayed in either or both of the **Assigned** and **Unassigned** fields in the Project County Maintenance Window as shown below.



4. Select (highlight) the desired county in the **Unassigned Counties** field.

5. Click on the **Assign Button** Assign.

   The highlighted county appears in the **Assigned Counties** field.

   This process can be reversed, highlighting an assigned county and using the **Unassign Button**, to correct mistaken entries.

6. Repeat steps 4-5 as needed for other counties effected by the project.

7. Click on the **Save Button** Save at the bottom of the window.

8. Click on the **Close Button** Close at the bottom of the window.

Delete a Project

Users cannot delete any project for which item installations have been recorded.

To delete a project, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

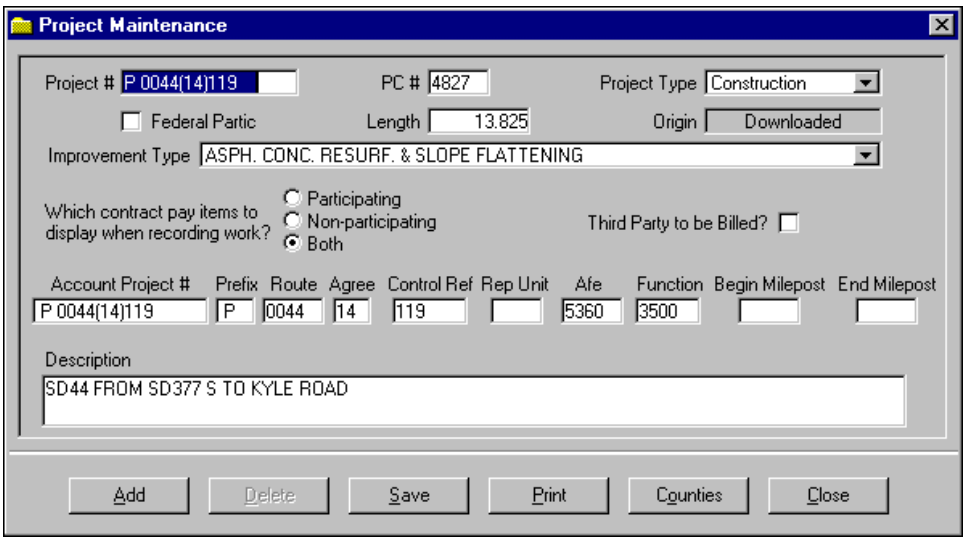
   The Manage Contract Window and toolbar appear.

2. Select the **Projects Tab**.

   The Manage Contract Window Projects Tab appears. All of the projects for the selected contract are displayed.

3. Double click on the desired **project**.

   The Project Maintenance Window appears as shown below.

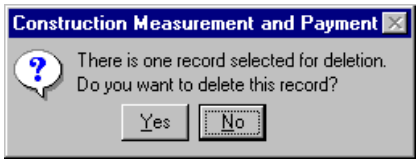


   All of the applicable project information is displayed in the various fields.

4. Verify that this is the desired project to delete.

5. Click on the **Delete Button** Delete at the bottom of the window.

CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** [No] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] enters the deletion command into the CM&P System.



6. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

7. Click on the **Save Button** [Save] at the bottom of the window.

   The deletion just made is now recorded.

8. Click on the **Close Button** [Close] at the bottom of the window.

Pay Item Procedures

For information about editing a pay item, refer to **Edit Contract Information**.

Close Pay Items

Users may choose to close item installations individually (referring to Close an Item Installation.) Or, they may choose to authorize and close item installations both at once (referring to Authorize and Close Item Installations.) But there are times when it is best to close many item installations as they are grouped into pay items from the Close Pay Items and/or Edit Pay Items Window.

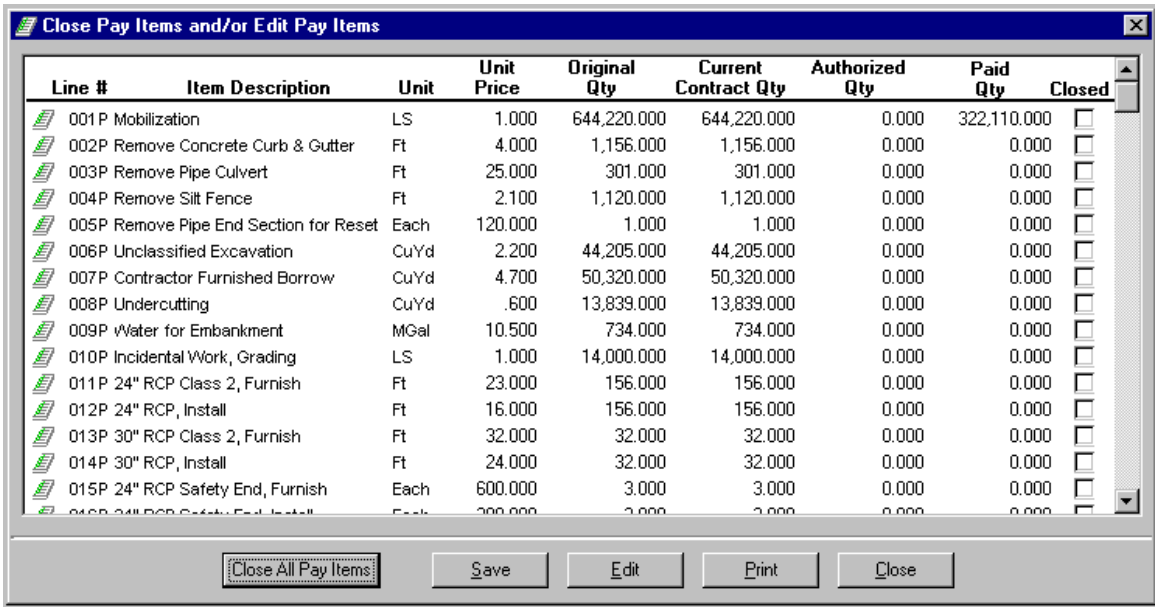
To close pay items from the Close Pay Items and/or Edit Pay Items Window, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window's Identifying Tab appears below the Manage Contract Toolbar.

2. Click on the **Close Pay Items Button** .

   The Close Pay Items and/or Edit Pay Items Window appears, displaying all recorded pay items for the contract.



Line #	Item Description	Unit	Unit Price	Original Qty	Current Contract Qty	Authorized Qty	Paid Qty	Closed
001P	Mobilization	LS	1.000	644,220.000	644,220.000	0.000	322,110.000	☐
002P	Remove Concrete Curb & Gutter	Ft	4.000	1,156.000	1,156.000	0.000	0.000	☐
003P	Remove Pipe Culvert	Ft	25.000	301.000	301.000	0.000	0.000	☐
004P	Remove Silt Fence	Ft	2.100	1,120.000	1,120.000	0.000	0.000	☐
005P	Remove Pipe End Section for Reset	Each	120.000	1.000	1.000	0.000	0.000	☐
006P	Unclassified Excavation	CuYd	2.200	44,205.000	44,205.000	0.000	0.000	☐
007P	Contractor Furnished Borrow	CuYd	4.700	50,320.000	50,320.000	0.000	0.000	☐
008P	Undercutting	CuYd	.600	13,839.000	13,839.000	0.000	0.000	☐
009P	Water for Embankment	MGal	10.500	734.000	734.000	0.000	0.000	☐
010P	Incidental Work, Grading	LS	1.000	14,000.000	14,000.000	0.000	0.000	☐
011P	24" RCP Class 2, Furnish	Ft	23.000	156.000	156.000	0.000	0.000	☐
012P	24" RCP, Install	Ft	16.000	156.000	156.000	0.000	0.000	☐
013P	30" RCP Class 2, Furnish	Ft	32.000	32.000	32.000	0.000	0.000	☐
014P	30" RCP, Install	Ft	24.000	32.000	32.000	0.000	0.000	☐
015P	24" RCP Safety End, Furnish	Each	600.000	3.000	3.000	0.000	0.000	☐

3. Locate the desired pay item(s) to close.

> Closing a pay item indicates that there is no activity left to be completed for this item of work. All installations have been authorized. The pay item is completely paid for. Also, there are no adjustments to be made by contract change order for this pay item. Consequently all quantities are in

balance and this pay item is completed from a field standpoint and will not prevent the contract from being finalled.

4. Click in the **Closed** column for each pay item to close.

   A checkmark appears in each checkbox selected.

   OR

   Click on the **Close All Pay Items Button** [Close All Pay Items].

   A checkmark appears in every checkbox.

5. Verify that the correct pay items are marked as closed.

   To deselect a marked checkbox, click in it again.

6. Click on the **Save Button** [Save] at the bottom of the window.

   A contract pay item can only be closed if all of the following are equal: Current Contract Qty, Authorized Qty from item installations, Requested Qty from pay estimates, and Actual Pay Qty from pay estimates. If unable to close a pay item, users are presented with a warning message directing them to the Final CCO Report to determine the reason. However, keep in mind that item installations which were authorized individually in the Item Installation Window must be closed individually in that window as well.

7. Click on the **Close Button** [Close] at the bottom of the window.

Delete a Pay Item

Any pay item that has item installations cannot be deleted. Any pay item that has been associated with either a contract change order or a pay estimate cannot be modified or deleted.

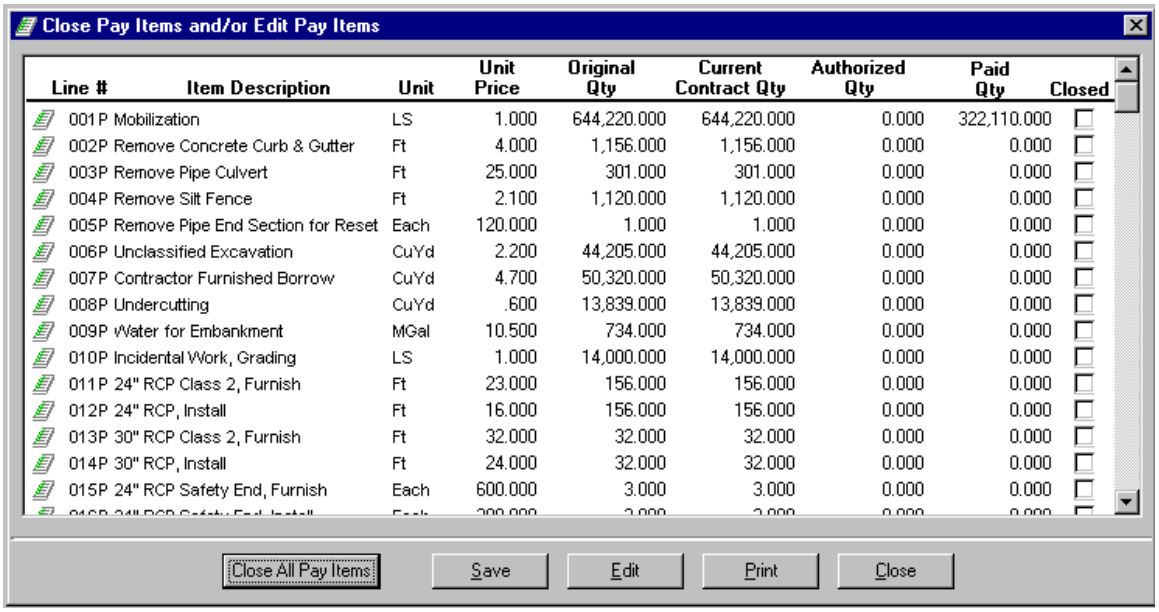
To delete a pay item from the CM&P System, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Button** .

   The Manage Contract Window's **Identifying Tab** appears below the Manage Contract Toolbar.

2. Click on the **Close Pay Items Button** {bmc close pay items button.shg.

   The Close Pay Items and/or Edit Pay Items Window appears as shown below.



Line #	Item Description	Unit	Unit Price	Original Qty	Current Contract Qty	Authorized Qty	Paid Qty	Closed
001P	Mobilization	LS	1.000	644,220.000	644,220.000	0.000	322,110.000	☐
002P	Remove Concrete Curb & Gutter	Ft	4.000	1,156.000	1,156.000	0.000	0.000	☐
003P	Remove Pipe Culvert	Ft	25.000	301.000	301.000	0.000	0.000	☐
004P	Remove Silt Fence	Ft	2.100	1,120.000	1,120.000	0.000	0.000	☐
005P	Remove Pipe End Section for Reset	Each	120.000	1.000	1.000	0.000	0.000	☐
006P	Unclassified Excavation	CuYd	2.200	44,205.000	44,205.000	0.000	0.000	☐
007P	Contractor Furnished Borrow	CuYd	4.700	50,320.000	50,320.000	0.000	0.000	☐
008P	Undercutting	CuYd	.600	13,839.000	13,839.000	0.000	0.000	☐
009P	Water for Embankment	MGal	10.500	734.000	734.000	0.000	0.000	☐
010P	Incidental Work, Grading	LS	1.000	14,000.000	14,000.000	0.000	0.000	☐
011P	24" RCP Class 2, Furnish	Ft	23.000	156.000	156.000	0.000	0.000	☐
012P	24" RCP, Install	Ft	16.000	156.000	156.000	0.000	0.000	☐
013P	30" RCP Class 2, Furnish	Ft	32.000	32.000	32.000	0.000	0.000	☐
014P	30" RCP, Install	Ft	24.000	32.000	32.000	0.000	0.000	☐
015P	24" RCP Safety End, Furnish	Each	600.000	3.000	3.000	0.000	0.000	☐

3. Locate the desired pay item.

4. Select (highlight) the desired pay item and click on the **Edit Button** Edit.

   OR

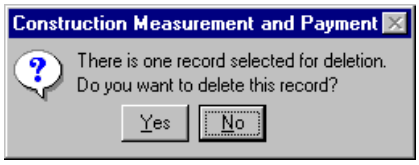
   Double click on the desired pay item.

The Pay Item Maintenance Window appears as shown below.

5. Verify that this is the desired pay item to delete.

6. Click on the **Delete Button** [Delete] at the bottom of the window.

   CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** [No] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] enters the deletion command into the CM&P System.



7. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

8. Click on the **Save Button** [Save] at the bottom of the window.

   The deletion just made is now recorded.

9. Click on the **Close Button** [Close] at the bottom of the window.

10. Click on the **Save Button** [Save].

11. Repeat steps 3-10 as desired for other pay items.

Contract Days

For information about editing the contract day range, refer to **Edit Contract Information**.

View the Contract Day Range

Users may also discover the contract day range by clicking on the **All Contract Days** radio button choice available in the tree panel on the left-hand side of the Contract Weather Day Window.

To view the contract working day range for a contract, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Button** .

   The Identifying Tab of the Manage Contract Window appears below the Manage Contract Toolbar.

2. Click on the **Manage Contract Days Button** on the Manage Contract Toolbar.

   The Manage Contract Days Window appears as shown below.

3. View the desired date(s) in the **Begin Date** and/or **End Date** fields.

4. Click on the **Cancel Button** Cancel.

Phase Days

For information about editing phase days, refer to **Edit Contract Information**.

Add an Additional Contract Phase

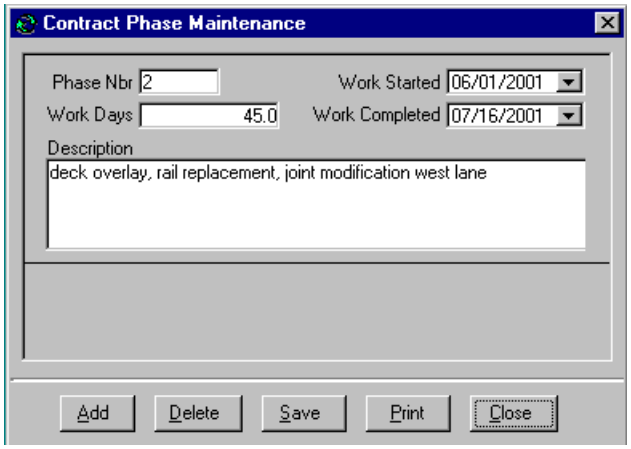
To add an additional phase to a contract, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window's Identifying Tab appears below the Manage Contract Window Toolbar.

2. Click on the **Manage Contract Phases Button** .

   The Contract Phase Maintenance Window appears as shown below.



3. Click on the **Add Button** Add at the bottom of the window.
4. Enter the desired numbers in the **Phase Number** and **Work Days** field.
5. Enter the desired information in the **Description** field.
6. Click on the **Save Button** Save.
7. Repeat steps 3-6 for any additional contract phases desired.
8. Click on the **Close Button** Close.

View Contract Phase Information

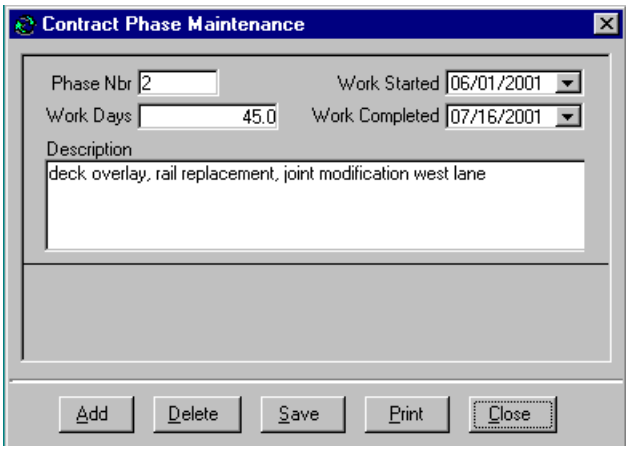
To view contract phase information, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window's Identifying Tab appears below the Manage Contract Toolbar.

2. Click on the **Manage Contract Phases Button** .

   The Contract Phase Maintenance Window appears as shown below.



3. View the contract phase information.

4. Click on the **Close Button** Close at the bottom of the window.

Delete a Contract Phase

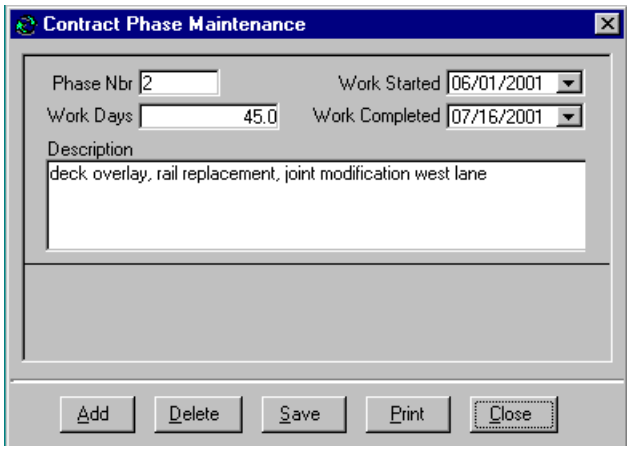
To delete a contract phase, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window's Identifying Tab appears below the Manage Contract Window Toolbar.

2. Click on the **Manage Contract Phases Button** .

   The Contract Phase Maintenance Window appears as shown below.

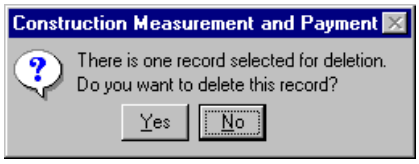


3. Click in any desired **field** within the contract phase to delete.

   Verify that this is the desired contract phase to delete.

4. Click on the **Delete Button** Delete at the bottom of the window.

   CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** No causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** Yes enters the deletion command into the CM&P System.



5. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

6. Click on the **Save Button** [Save].

   The deletion just made is now recorded.

7. Click on the **Close Button** [Close].

Contract Logs

For information about editing a contract log, refer to **Edit Contract Information**.

Create a Contract Log Entry

To create a contract log entry, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

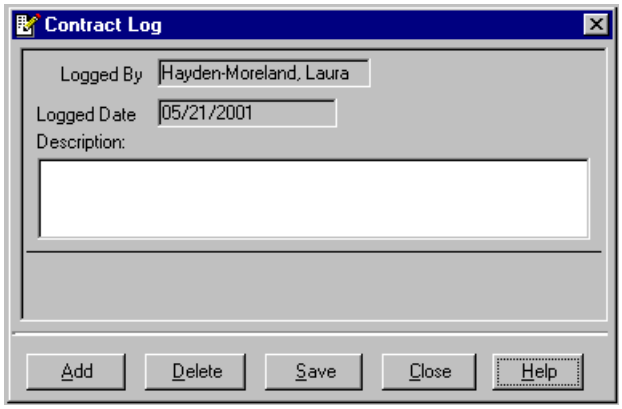
   The Manage Contract Window appears below the Manage Contract Toolbar appear.

2. Click on the **Manage Contract Log Button** .

   The Contract Log Window appears with any earlier log entries listed chronologically. If no previous entries have been made, the window is blank.

3. Click on the **Add Button** Add.

   A new contract log appears above any previous entries, with information automatically supplied for its **Logged By** and **Logged Date** fields as shown below.



> This entry will be recorded at the end of the chronological list of log entries once the window has been closed.

4. Enter the information to be logged in the **Description** field.

5. Click on the **Save Button** Save.

6. Click on the **Close Button** Close.

Delete a Contract Log Entry

Users may delete only their own log entries.

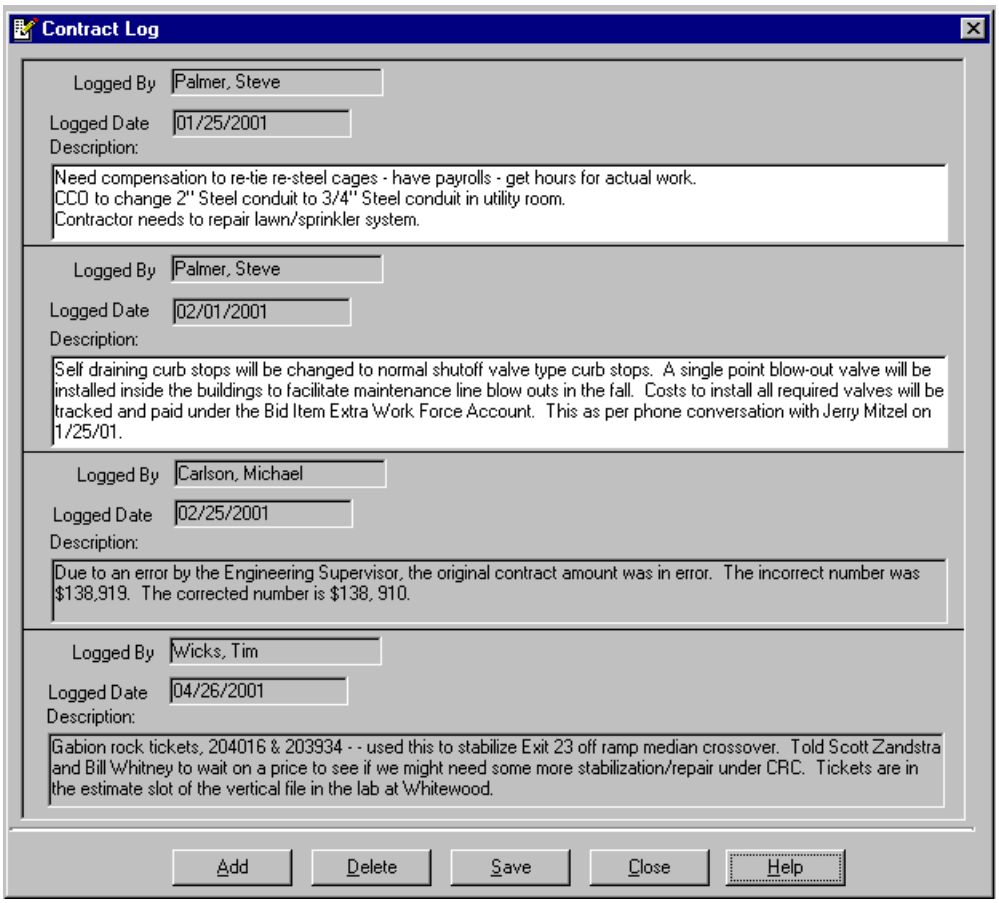
To delete a contract log entry, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button**.

   The Manage Contract Window appears below the Manage Contract Toolbar appear.

2. Click on the **Manage Contract Log Button**.

   The Contract Log Window appears with any earlier log entries as shown below. (The user's log entries will display with white fields because they are editable for the user.)

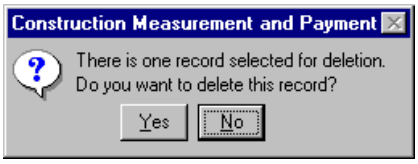


3. Locate the desired contract log entry, scrolling through the chronological list if necessary.

4. Verify that this is the desired log entry to delete.

5. Click on the **Delete Button** Delete.

CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** [No] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] enters the deletion command into the CM&P System.



6. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

7. Click on the **Save Button** [Save].

   The deletion just made is now recorded.

8. Click on the **Close Button** [Close].

View the Contract Log

All users who can open the Manage Contract Window can view contract log entries.

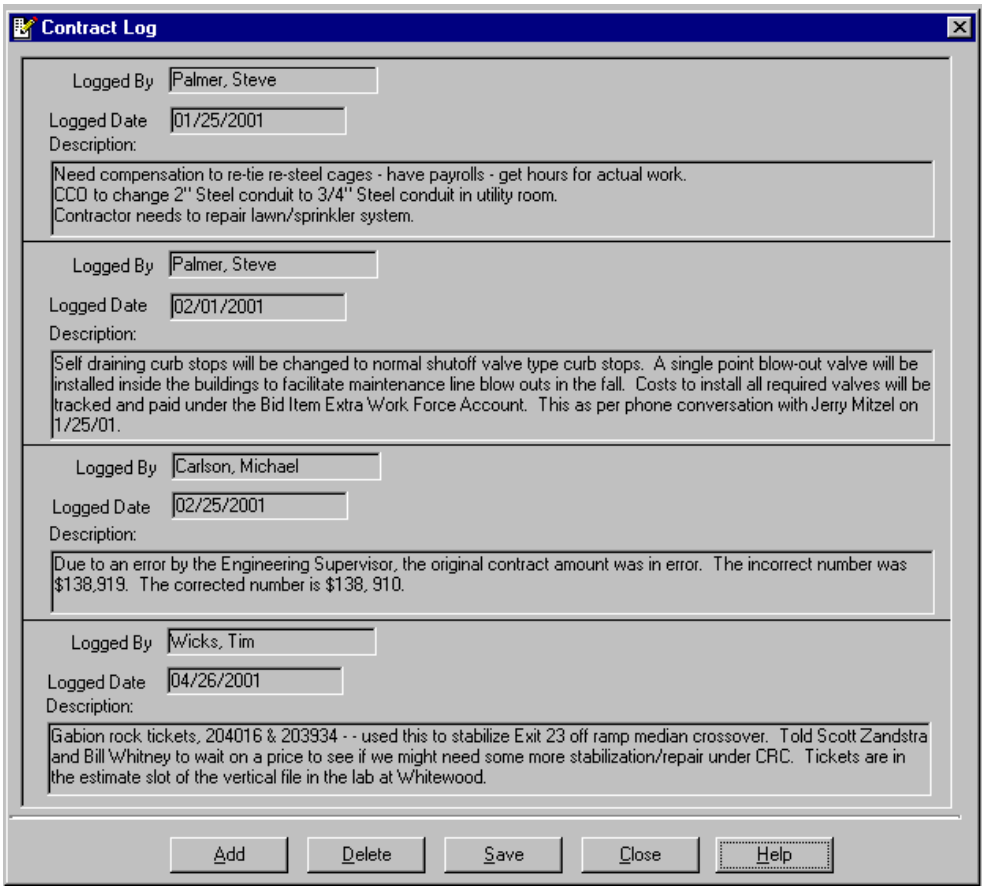
To view the contract log, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window appears below the Manage Contract Toolbar appear.

2. Click on the **Manage Contract Log Button** .

   The Contract Log Window appears with any log entries listed chronologically as shown below. (If no entries have been made, the window is blank.)



3. Scroll through and view the log entries.

4. Click on the **Close Button** .

Edit Contract Information

To edit contract information, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window Identifying Tab appears below the Manage Contract Toolbar.

2. Edit any desired information on the **Identifying Tab**.

3. Click on (and edit information for) any other desired tabs.

   Refer to Update the Closed Date, Update the Voucher Processed Date, or Mark a Contract as Finalled if necessary.

4. Click on the **Edit-View Project Button** to edit any desired information for the contract's projects.

   Refer to Edit a Project if necessary.

5. Click on the **Close Pay Items Button** to edit any desired information for the contract's pay items.

   Refer to Edit Pay Items if necessary.

6. Click on the **Edit-View Subcontractor Button** to edit EEO information for the contract's subcontractors.

   Refer to Edit or Enter Subcontract EEO Information if necessary.

7. Click on the **Manage Contract Days Button** to edit information for the contract's days.

   Refer to Edit Contract Days if necessary.

8. Click on the **Contract Phases Button** to edit information for the contract's phases.

   Refer to Edit Contract Phase Days if necessary.

9. Click on the **Contract Log Button** to edit individual entries for the contract's log.

   Refer to Edit a Contract Log Entry if necessary.

10. Click on the **Save Button** Save at the bottom of the window.

11. Click on the **Close Button** Close at the bottom of the window.

Update the Closed Date

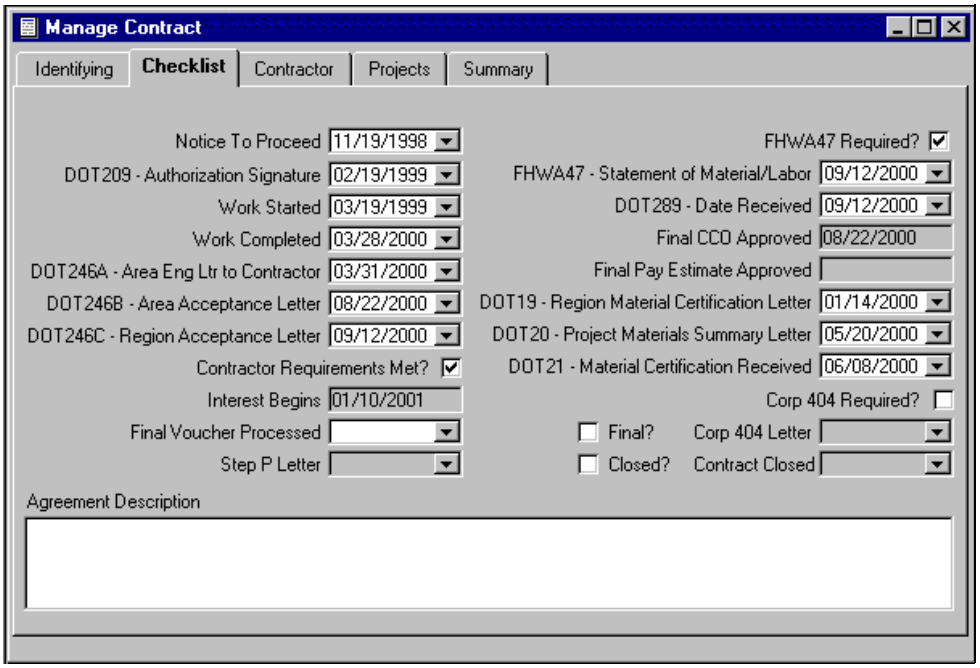
To update the **Contract Closed** field, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window's Identifying Tab appears below the Manage Contract Window Toolbar.

2. Click on the **Checklist Tab**.

   The Manage Contract Window's Checklist Tab appears as shown below.



3. (The **Closed?** checkbox must be marked to make the **Contract Closed** field editable.) Enter the desired date in the **Contract Closed** field (two-digit month /two-digit day/four-digit year format).

   OR

   Select (highlight) the date on the dropdown calendar by clicking on the down arrow next to the **Contract Closed** field.

4. Click on the **Save Button** .

   The changes just made are recorded.

5. Click on the **Close Button** .

Update the Final Voucher Processed Date

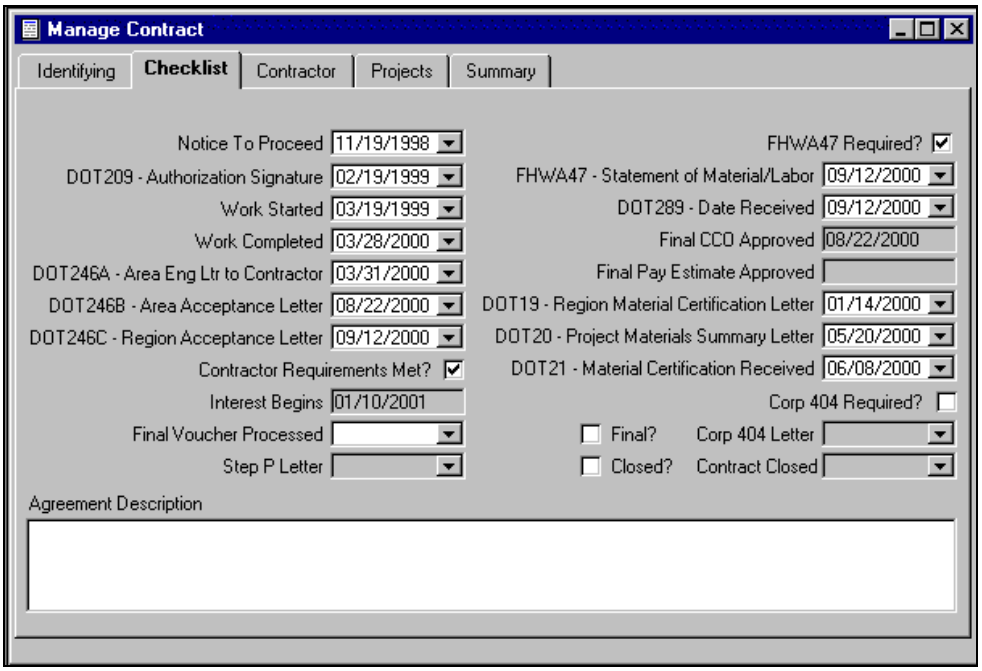
To update the **Final Voucher Processed** field, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window's Identifying Tab displays below the Manage Contract Window Toolbar.

2. Click on the **Checklist Tab**.

   The Manage Contract Window's Checklist Tab displays as shown below.



3. Enter the final voucher processed date (two-digit month /two-digit day/four-digit year format) in the **Final Voucher Processed** field.

   OR

   Select (highlight) the date on the dropdown calendar by clicking on the down arrow next to the **Final Voucher Processed** field.

4. Click on the **Save Button** .

   The changes just made are recorded.

5. Click on the **Close Button** .

Mark a Contract as Finalled

To ensure that the final CCO and the final pay estimate go smoothly, it is helpful to view the Final CCO Report and the Close Contract Report.

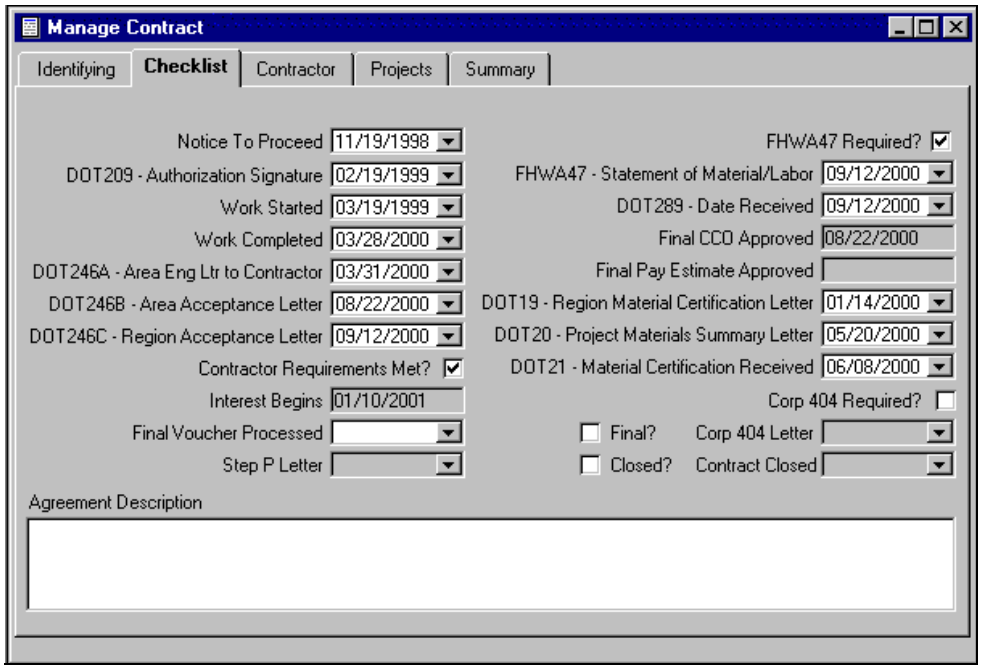
It is important to understand that the finalling instructions given here will final the contract *specifically from the perspective of the field personnel*. The Financial Representative will still be responsible for actually *closing* the contract.

To final a contract, perform the following steps.

1. Create the Final Contract Change Order, (referring to those instructions if necessary.)
2. Create the Final Pay Estimate, (referring to those instructions if necessary.)
3. From the CM&P Frame Toolbar, click on the **Manage Contract Button**.

   The Manage Contract Window displays below the Manage Contract Toolbar.
4. Click on the **Checklist Tab**.

   The Manage Contract Window Checklist Tab displays as shown below.



5. Click on the **Final?** checkbox.

   A checkmark now appears in the checkbox.
6. Click on the **Save Button** and then on the **Close Button**.

Edit a Project

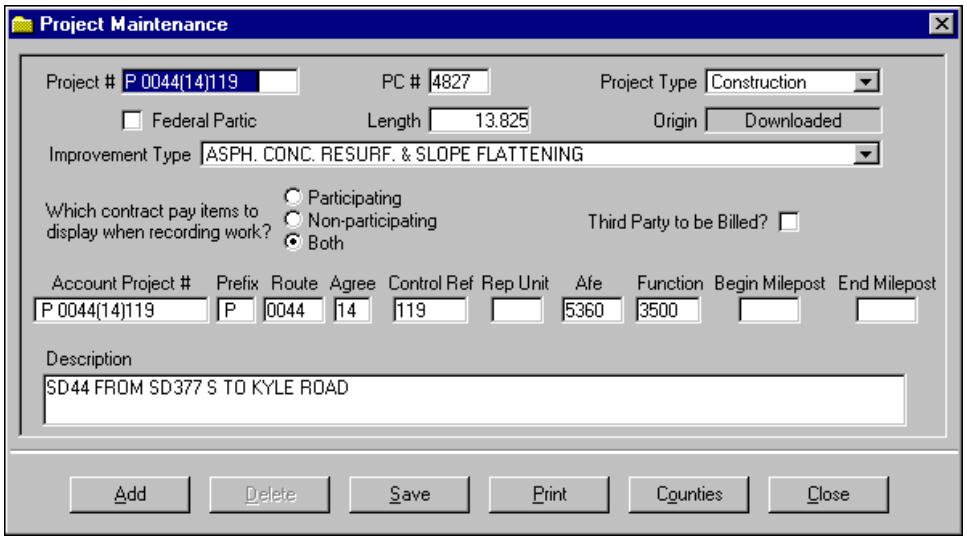
To edit a project, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window appears below the Manage Contract Toolbar.

2. Click on the **Edit-View Project Button** .

   The Project Maintenance Window appears as shown below.



3. Edit the desired information displayed in the window.

4. Click on the **Save Button** Save at the bottom of the window.

5. Click on the **Close Button** Close at the bottom of the window.

> From this window, users may also edit county information for the project, by clicking on the **Counties Button** Counties.

Edit Project County Information

To edit project county information, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

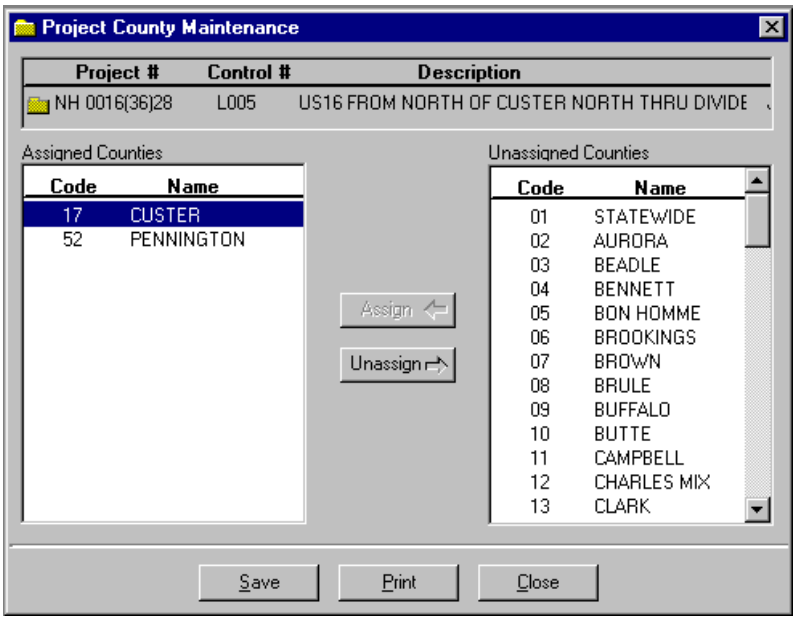
   The Manage Contract Window appears below the Manage Contract Toolbar.

2. Click on the **Edit-View Project Button** .

   The Project Maintenance Window appears.

3. Click on the **Counties Button** Counties.

   The Project County Maintenance Window appears as shown below.



4. Locate and select (highlight) the desired county.

5. Click on the **Assign Button** Assign or **Unassign Button** Unassign as appropriate.

6. Click on the **Save Button** Save at the bottom of the window.

7. Repeat steps 4-6 for other counties as desired.

8. Click on the **Close Button** Close at the bottom of the window.

Edit Pay Items

> The quantity of a pay item can only be modified through a contract change order. Any pay item that has been associated with either a contract change order or a pay estimate cannot be modified.

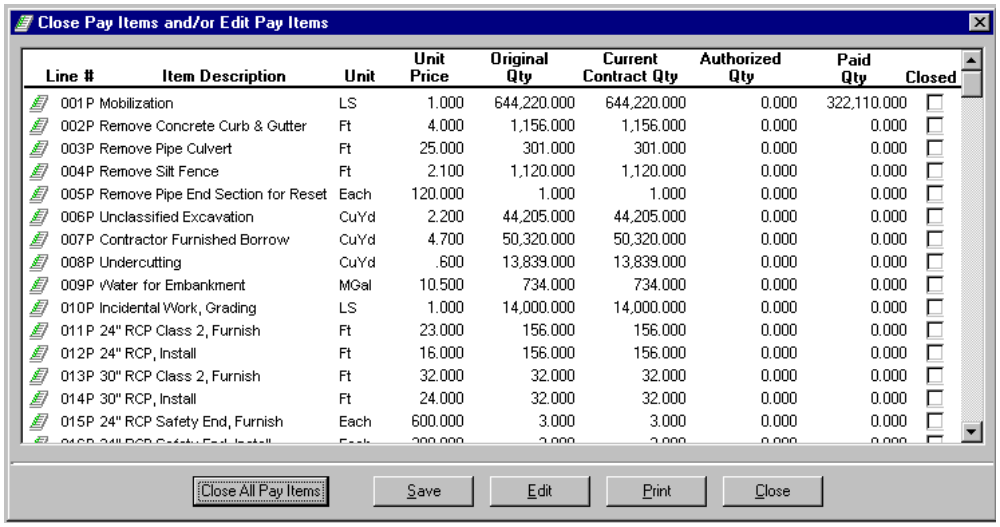
To edit a pay item, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window's Identifying Tab appears below the Manage Contract Toolbar.

2. Click on the **Close Pay Items Button** .

   The Close Pay Items and/or Edit Pay Items Window appears as shown below.



Line #	Item Description	Unit	Unit Price	Original Qty	Current Contract Qty	Authorized Qty	Paid Qty	Closed
001P	Mobilization	LS	1.000	644,220.000	644,220.000	0.000	322,110.000	☐
002P	Remove Concrete Curb & Gutter	Ft	4.000	1,156.000	1,156.000	0.000	0.000	☐
003P	Remove Pipe Culvert	Ft	25.000	301.000	301.000	0.000	0.000	☐
004P	Remove Silt Fence	Ft	2.100	1,120.000	1,120.000	0.000	0.000	☐
005P	Remove Pipe End Section for Reset	Each	120.000	1.000	1.000	0.000	0.000	☐
006P	Unclassified Excavation	CuYd	2.200	44,205.000	44,205.000	0.000	0.000	☐
007P	Contractor Furnished Borrow	CuYd	4.700	50,320.000	50,320.000	0.000	0.000	☐
008P	Undercutting	CuYd	.600	13,839.000	13,839.000	0.000	0.000	☐
009P	Water for Embankment	MGal	10.500	734.000	734.000	0.000	0.000	☐
010P	Incidental Work, Grading	LS	1.000	14,000.000	14,000.000	0.000	0.000	☐
011P	24" RCP Class 2, Furnish	Ft	23.000	156.000	156.000	0.000	0.000	☐
012P	24" RCP, Install	Ft	16.000	156.000	156.000	0.000	0.000	☐
013P	30" RCP Class 2, Furnish	Ft	32.000	32.000	32.000	0.000	0.000	☐
014P	30" RCP, Install	Ft	24.000	32.000	32.000	0.000	0.000	☐
015P	24" RCP Safety End, Furnish	Each	600.000	3.000	3.000	0.000	0.000	☐

3. Locate the desired pay item.

4. Select (highlight) the desired pay item and click on the **Edit Button** Edit.

   OR

   Double click on the desired pay item.

The Pay Item Maintenance Window appears as shown below.

5. Edit the pay item as desired.
6. Click on the **Save Button** Save.
7. Repeat steps 3-6 as desired for other pay items.
8. Click on the **Close Button** Close.

Edit or Enter Subcontractor EEO Information

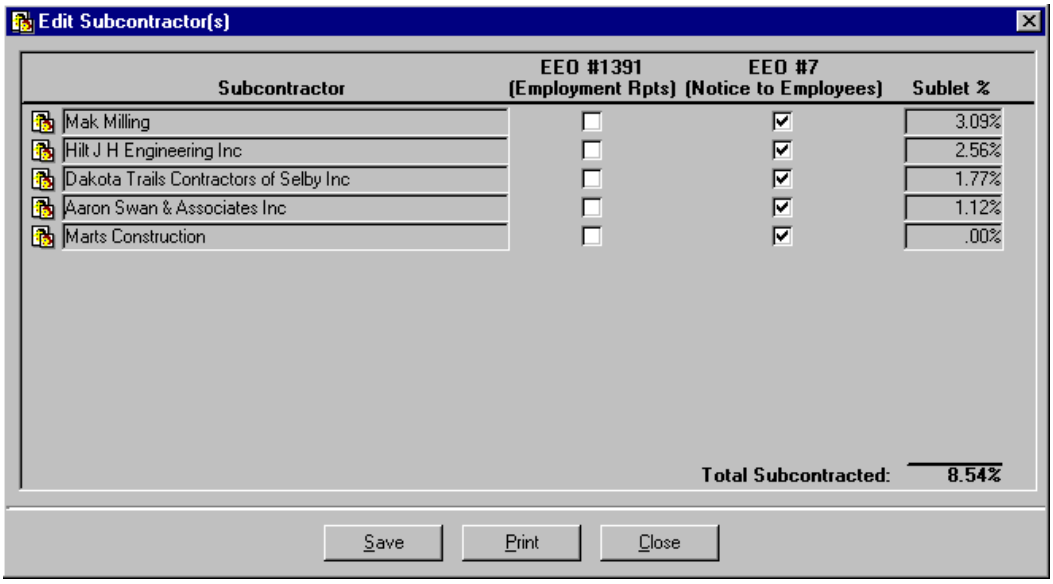
To edit or enter subcontractor EEO information, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window Identifying Tab displays below the Manage Contract Toolbar.

2. Click on the **Subcontractor Button** .

   The Edit Subcontractor(s) Window displays as shown below.



3. Click on the **EEO #1391 (Employment Rpts)** checkboxes as appropriate to specify if the subcontractors must file EEO #1391 reports.

4. Click on the **EEO #7 (Notice to Employees)** checkboxes as appropriate to specify if the subcontractors must file EEO #7 letters.

5. Click on the **Save Button** Save.

6. Click on the **Print Button** Print if desired to print the subcontractor on your default printer.

7. Click on the **Close Button** Close.

Edit Contract Days

To edit the contract working day range on the CM&P System, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Button** .

   The Identifying Tab of the Manage Contract Window appears below the Manage Contract Toolbar.

2. Click on the **Manage Contract Days Button** on the Manage Contract Toolbar.

   The Manage Contract Days Window appears as shown below.

3. Edit the desired date(s) using the dropdown calendars in the **Begin Date** and/or **End Date** fields.

4. Click on the **OK Button** OK.

> These two dates define the group of dates available to technicians when entering information in the Contract Weather Day Window.

Edit Contract Phase Days

> Contract phase setups are required for assessing working days by phase and interim completion dates.

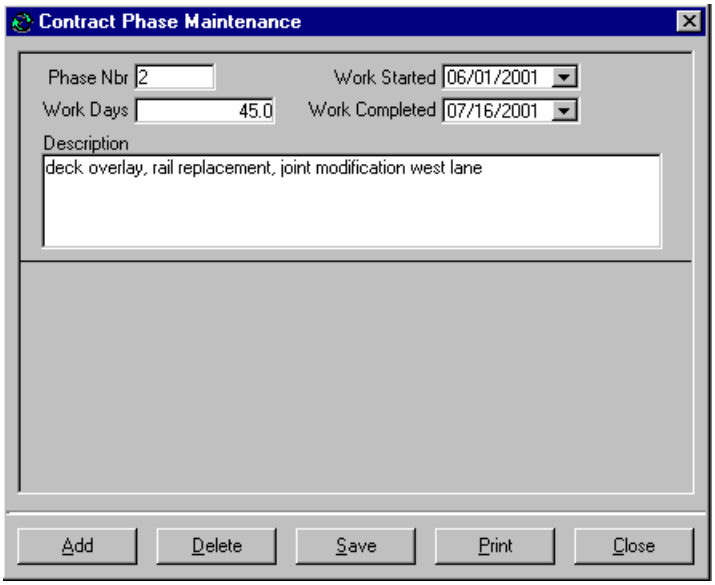
To edit contract phases, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button**.

   The Manage Contract Window's Identifying Tab appears below the Manage Contract Window Toolbar.

2. Click on the **Manage Contract Phases Button**.

   The Contract Phase Maintenance Window appears as shown below.



3. Edit the desired information, using the dropdown calendars for the **Work Started** and **Work Completed** fields as appropriate.

4. Click on the **Save Button** Save.

5. Click on the **Close Button** Close.

Edit a Contract Log Entry

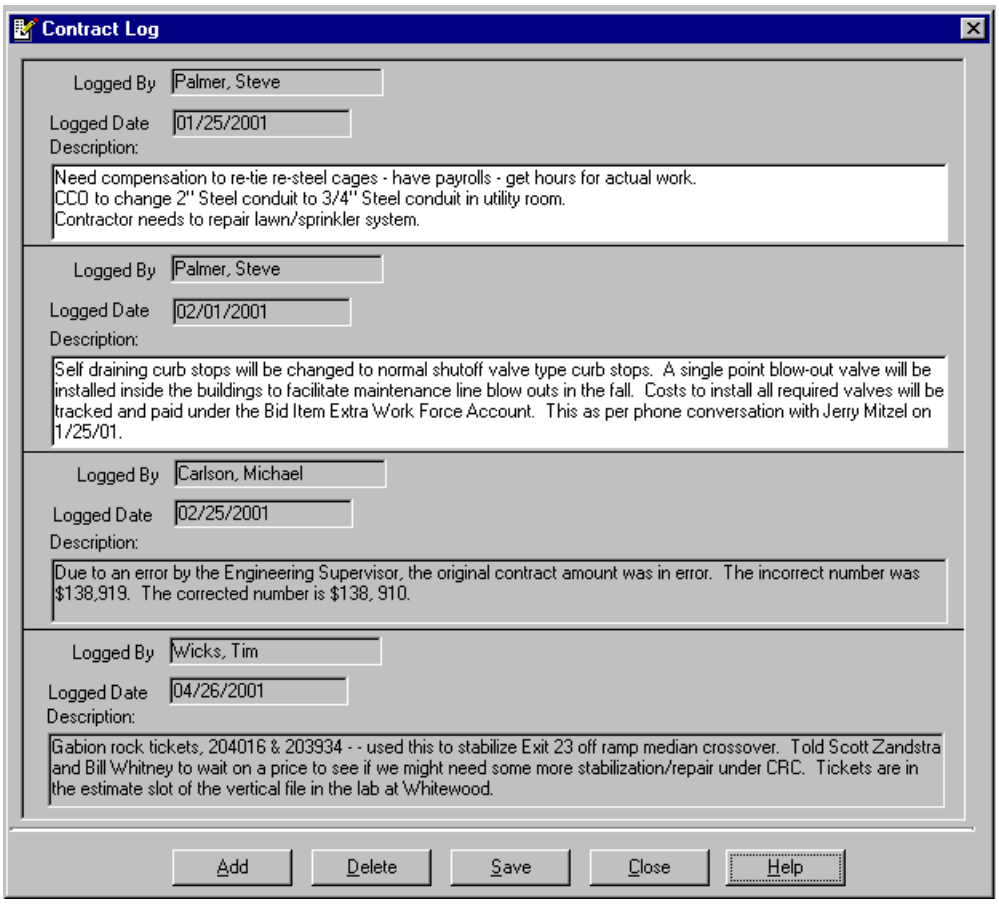
To edit a contract log entry, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window appears below the Manage Contract Toolbar appear.

2. Click on the **Manage Contract Log Button** .

   The Contract Log Window appears with any earlier log entries as shown below. (The user's log entries will display with white fields because they are editable for the user.)



3. Locate the desired contract log entry, scrolling through the chronological list if necessary.

4. Edit the information logged in the **Description** field as desired.

5. Click on the **Save Button** Save.

6. Click on the **Close Button** Close.

Users may edit only their own log entries.

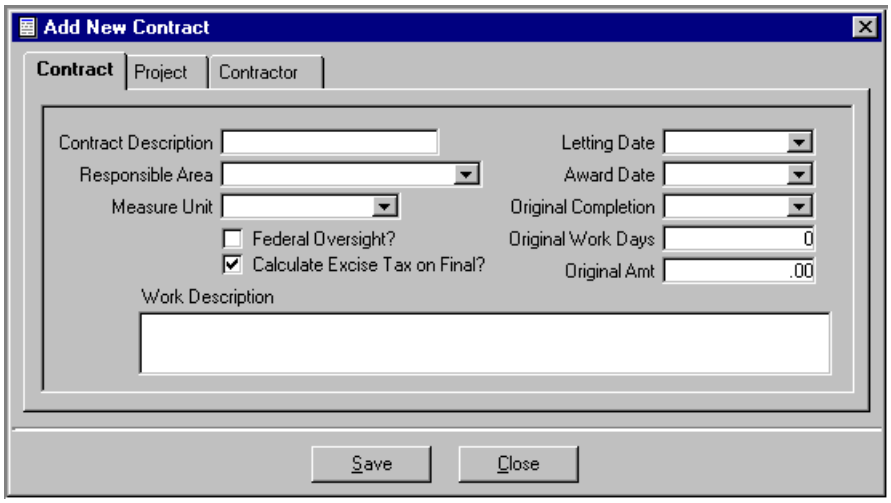
Create an Informal Contract

Informally let contracts with standard bid items and a PCEMS number may be created in the CM&P System by engineering supervisors.

To create an informal contract, perform the following steps.

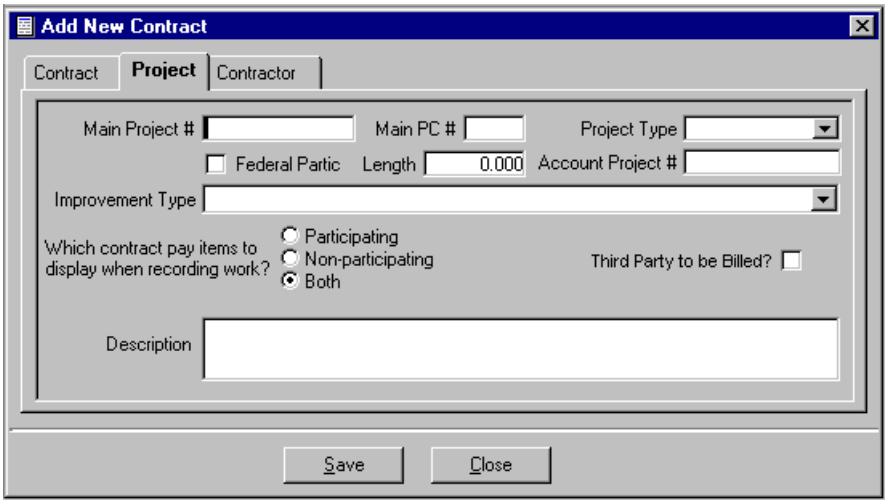
1. Close any open CM&P windows (including the Select a Contract Window).
2. Follow the menu path: **File**, **New Contract**.

   The Add New Contract Window appears as shown below.



3. On the **Contract Tab**, enter descriptive information in the **Contract Description** and **Work Description** fields.
4. Select the desired information from the dropdown listings for the **Responsible Area, Measure Unit, Letting Date, Award Date,** and **Original Completion** fields.
5. Mark the **Federal Oversight?** and **Calculate Excise Tax on Final?** checkboxes if appropriate.
6. Enter the appropriate information in the **Original Work Days** and **Original Amount** fields.
7. Click on the **Project Tab**.

The Add New Contract Window Project Tab displays as shown below.



8. Enter the appropriate information in the **Main Project #, Main PC#,** and **Account Project #** fields.

9. Select the desired information from the dropdown listings for the **Project Type** and **Improvement Type** fields.

10. Mark the **Federal Participation** checkbox if appropriate.

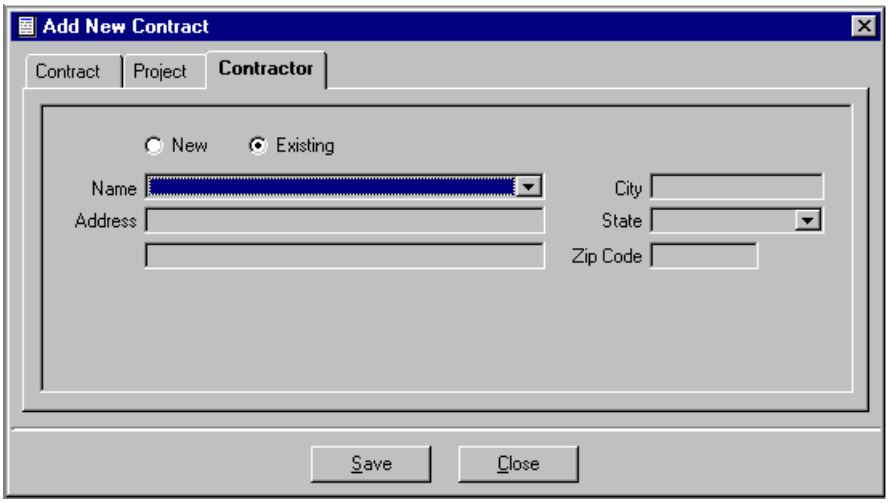
11. Mark the **Participating**, **Non-participating**, or **Both** radio button if appropriate.

12. Mark the **Third Party to be Billed?** checkbox if appropriate.

13. Enter the appropriate information in the **Length** and **Description** fields.

14. Click on the **Contractor Tab**.

    The Add New Contract Window Contractor Tab displays as shown below.



15. Mark either the **New** or **Existing** radio button as appropriate.

    If the **New** radio button is selected, contractor information fields become available for entries. However, if the **Existing** radio button is selected, only the **Name** field dropdown list is available for a choice of contractors already entered into the CM&P System.

16. Enter contractor information for a new contractor.

    OR

    Select the appropriate existing contractor from the dropdown list.

17. Click on the **Save Button** Save. (If required information is missing, the system will prompt for the needed information.)

18. Click on the **Close Button** Close.

    CM&P assigns a contract id number to the new contract and displays the Manage Contract Window for the new contract.

19. Click on the **Project Button** to edit the Main Project information, associate Counties information, and add any other minor project.

20. Click on the **Pay Items Button** to add contract line items. (Repeat this procedure for any added projects.)

21. Click on the **Days Button** to specify a contract working day range so that work can be recorded for the contract in the field.

22. Contact Teresa Rupe in Finance by email or phone (773-5615) to have the appropriate accounting information entered.

    This will generate Pay Estimate #1 and Mobilization will be paid as though it came from Bid Letting. The first Pay Estimate from the field for contract items of work should then be Pay Estimate #2.

WARNING: If users fail to notify Finance about an informally let contract, they will be unable to pay the contractor.

To change any information about the informal contract's contractor, use the Contractor Window from the menu path: **Administration, Maintain Code Tables, Contractor**.

Add Pay Items to a New Contract

Refer to the help topic Resume Adding Pay Items to an Informal Contract if returning to this process after closing the Close Pay Items and/or Edit Pay Items Window.

To add pay items to a new contract, perform the following steps.

1. If necessary, from the CM&P Frame Toolbar, click on the **Manage Contract Button**.

   The Manage Contract Window appears below the Manage Contract Toolbar.

2. Click on the **Close Pay Items Button**.

   The Close Pay Items and/or Edit Pay Items Window appears and displays as empty.

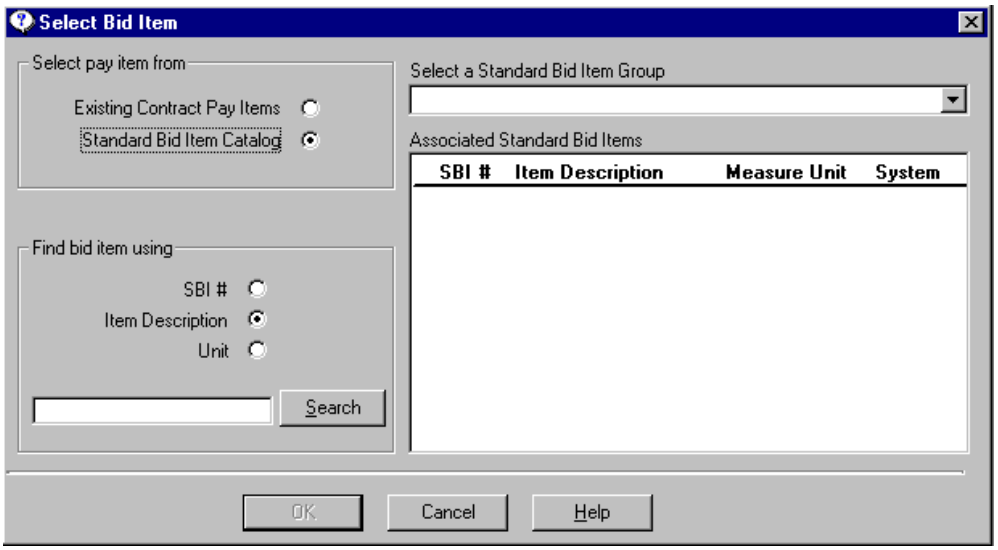
   The Pay Item Maintenance Window appears and displays as empty as well.

3. Click on the **Add Button** Add.

   The Select Bid Item Window appears and displays as empty.

4. In the **Select pay item from** panel, mark the **Standard Bid Item Catalog** radio button.

   The **Select a Standard Bid Item Group** field appears above the list panel on the right side of the window as shown below.



5. Use the **Select a Standard Bid Item Group** field's dropdown list to select (highlight) the desired group of bid items from which to select a bid item.

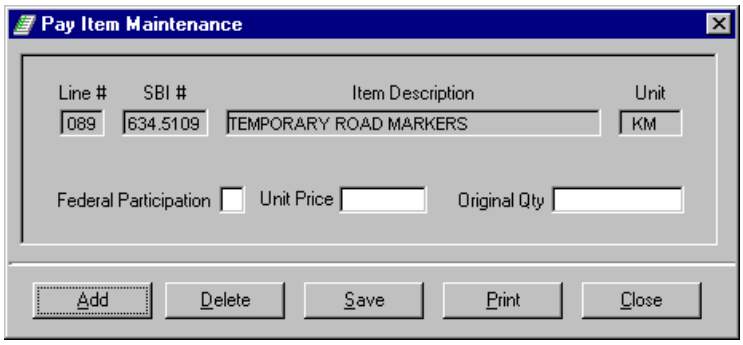
6. Locate the item to be added, using the **Find bid item using** panel's search function if necessary.

7. Select (highlight) the desired item and click on the **OK Button** OK.

   OR

   Double click on the desired item.

   The Pay Item Maintenance Window appears, with line number, SBI number, item description, and unit of measurement already supplied as shown below.



8. Using either **N** or **P**, indicate whether Federal Participation is to be expected for this item.

9. Enter the desired amount in the **Unit Price** field.

10. Enter the desired amount in the **Original Quantity** field.

> The pay item as entered must be unique in its combination of SBI #, Federal Participation indication, and Unit Price.

11. Click on the **Save Button** Save at the bottom of the window.

12. To add another pay item to the contract at this time, repeat steps 3-11.

13. Click on the **Close Button** Close at the bottom of the window.

Resume Adding Pay Items to an Informal Contract

> Always add pay items to a contract through the CCO process, unless entering information for an informal contract.

To resume adding pay items to an informal contract, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button**.

   The Manage Contract Window appears below the Manage Contract Toolbar appear.

2. Click on the **Close Pay Items Button**.

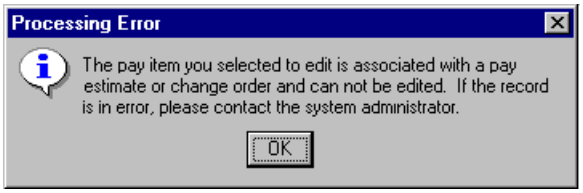
   The Close Pay Items and/or Edit Pay Items Window appears, displaying all recorded pay items for the contract.

3. Select (highlight) any pay item listed and click on the **Edit Button** Edit.

   OR

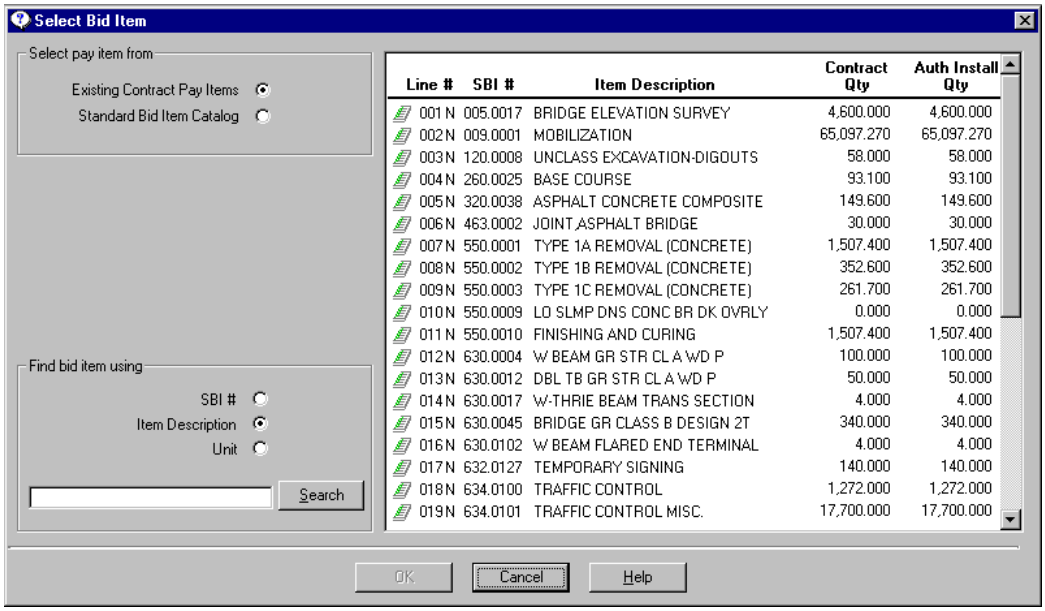
   Double click on any pay item listed.

   The Pay Item Maintenance Window appears. If the pay item selected has been associated with a CCO or pay estimate, a Processing Error message (which will need to be **OKed**) will also appear as shown below.



4. Click on the **Add Button** Add.

The Select Bid Item Window appears as shown below.



5. In the **Select pay item from** panel, choose and mark the radio button for the group of pay items within which the new pay item will be found.

6. Locate the item to be added, using the **Find bid item using** panel's search function if necessary.

7. Select (highlight) the desired item and click on the **OK Button**.

   OR

   Double click on the desired item.

   The Pay Item Maintenance Window appears, with line number, SBI number, item description, and unit of measurement already supplied.

8. Using either **N** or **P**, indicate whether Federal Participation is to be expected for this item.

9. Enter the desired amount in the **Unit Price** field.

10. Enter the desired amount in the **Original Quantity** field.

> The pay item as entered must be unique in its combination of SBI #, Federal Participation indication, and Unit Price.

11. Click on the **Save Button** [Save] at the bottom of the window.

12. To add another pay item to the contract at this time, repeat steps 4-11.

13. Click on the **Close Button** [Close] at the bottom of the window.

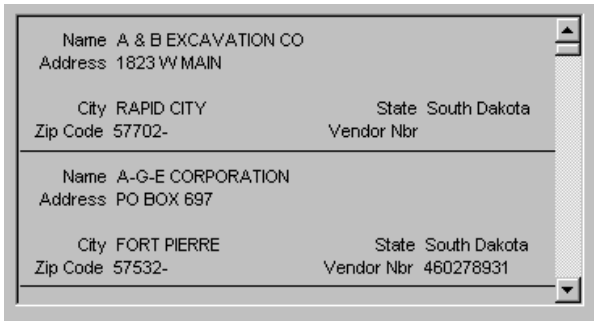
Edit Contractor Information on an Informal Contract

No contractor information from other contracts can be affected by users. Prime contractors on a formally let project cannot be modified.

To edit contractor information on an informally let contract, perform the following steps:

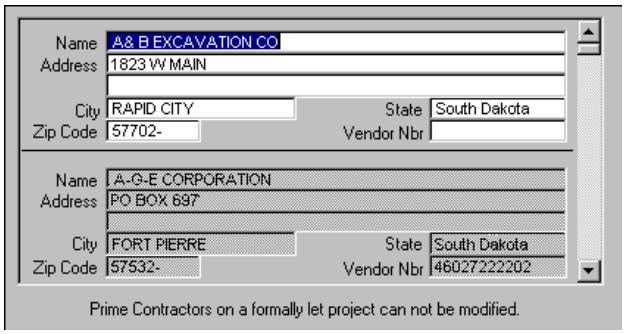
1. Follow the menu path: **Administration**, **Maintain Code Tables**, **Contractor.**

   The Contractor Window appears as shown below.



2. Click on the **Modify Button**.

   The fields within the Contractor Window become white, as shown below, indicating that data can be entered.



3. Locate the desired **contractor record**, specifying a sort if necessary.
4. Click inside the desired **field**.
5. Edit the desired **information**.
6. Click on the **Save Button**.
7. Click on the **Close Button**.

9. Record Work

The Record Work Window is reached through the **Record Work Button** on the Frame bar Toolbar or through the menu path: **Goto, Record Work**. Within this window, users can record work within the CM&P System. Using buttons on the Record Work Toolbar shown below, users can add, edit, or delete item installations. They can also authorize item installations partially, individually, consecutively, or en masse.

The **Print Button** allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **Item Installation Button** allows users to record item installations and site observations that are specific to an individual item installations.

The **Authorize All Button** allows users to authorize all item installations for a contract.

The **Authorize Item Installs Button** opens the Authorize Item Installation Window (a pay item must first be selected.) This enables users to authorize the item installation(s) that have been recorded for a particular pay item.

The **Help Button** allows users to retrieve help from the application's online help file. If the specific information required is not supplied immediately, try searching the Help Topics panel to the left of the main Help panel.

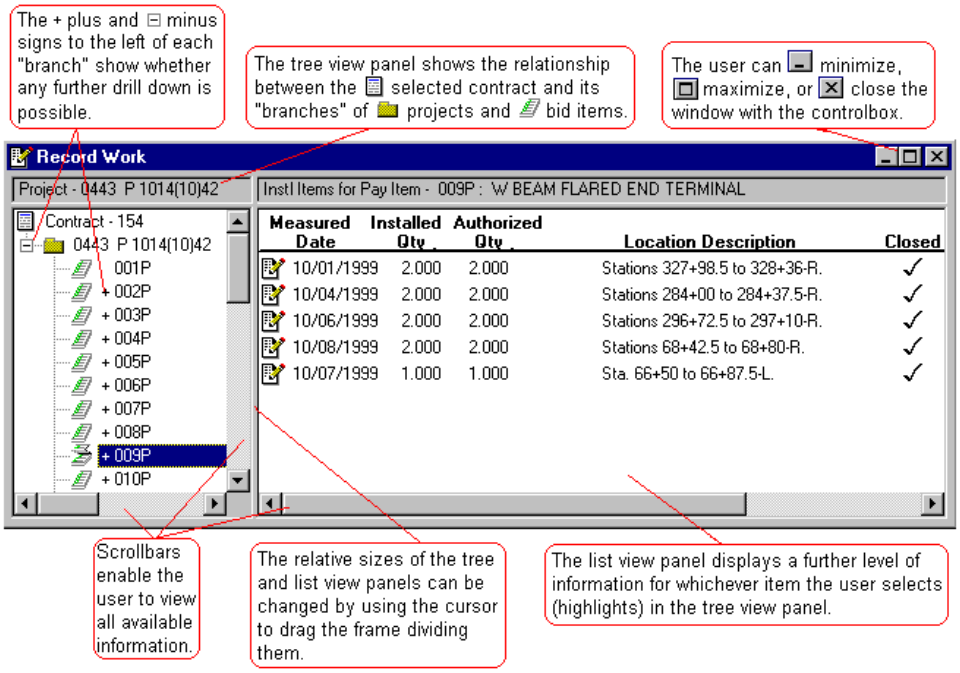
The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.

Record Work Window

When first opened, the Record Work Window displays current contract, installed, authorized, and paid quantities for each pay item as in the example below. This allows users to view the status of item installations for the contract overall.

Line #	Item Description	Unit	Unit Price	Current Contract Qty	Installed Qty	Authorized Qty	Paid Qty
001N	MOBILIZATION	L.S.	.30	123,000.00	123,000.00	123,000.00	123,000.00
001P	MOBILIZATION	L.S.	.70	123,000.00	123,000.00	123,000.00	123,000.00
002P	REMOVE BEAM GR	L.F.	1.50	1,100.00	1,100.00	1,100.00	1,100.00
003P	REMOVE W BEAM GR	EACH	100.00	12.00	12.00	12.00	12.00
004P	REM & RES PIPE END	EACH	250.00	2.00	2.00	2.00	2.00
005P	REMOVE RUBRAIL /RES	L.F.	5.00	96.00	96.00	96.00	96.00
006P	UNCLASS EXCAV-DIGOL	CUYD	5.00	4,999.00	4,999.00	4,999.00	4,999.00
007P	BORROW UNCLASS EXC	CUYD	4.25	3,466.00	3,466.00	3,466.00	3,466.00
008P	BASE COURSE (SALV)	TON	3.00	2,946.20	2,946.20	2,946.20	2,946.20
009N	HYDRATED LIME/ASPH C	TON	110.00	57.40	57.40	57.40	57.40
009P	HYDRATED LIME/ASPH C	TON	110.00	282.40	282.40	282.40	282.40
010N	ASPH CONC CONTRACTC	TON	15.00	3,028.40	3,028.40	3,028.40	3,028.40
011N	AC CONTR FURN & PLAC	TON	24.00	518.70	518.70	518.70	518.70
012N	AC CONTR FURN & PLAC	TON	27.00	127.90	127.90	127.90	127.90
013N	AC CONTR FURN & PLAC	TON	23.00	4,511.00	4,511.00	4,511.00	4,511.00

The Record Work Window also allows users to view individual item installation information as shown in the drilled down and annotated example below.



Item Installations

Create an Item Installation

To install a quantity of a pay item on the CM&P system, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Record Work Button** .

   The Record Work Window appears below the Record Work Toolbar.

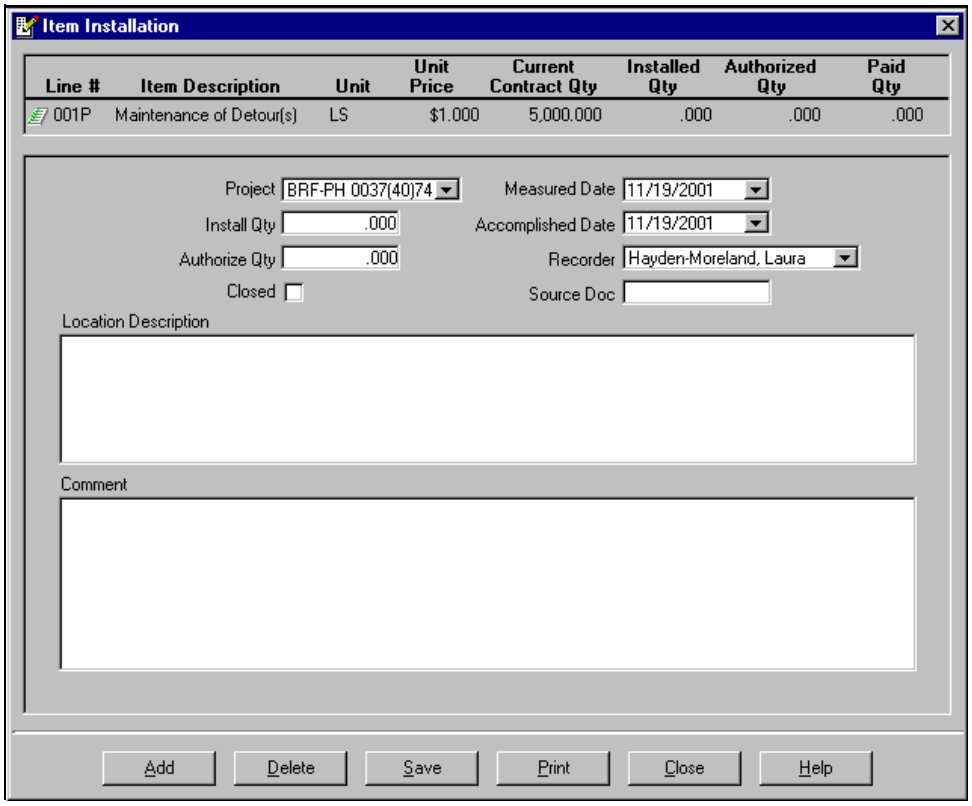
2. Select (highlight) the desired **project** in the tree panel if more than one is included in the contract.

   The project's pay items display below the project folder in the tree panel.

3. Select the desired **pay item** in the tree panel.

4. Click on the **Item Installation Button** .

   The Item Installation Window appears as shown below.



5. Enter the install quantity in the **Install Qty** field.

6. Change the dates in the **Measured Date** and/or **Accomplished Date** fields (if necessary) by selecting the appropriate date(s) from the fields' drop-down lists.

7. Change the name in the **Recorder** field (if necessary) by selecting the appropriate name from the field's drop-down list.

8. Enter the source document (if any) in the **Source Doc** field.

9. Enter any station number(s) or other descriptive information in the **Location Description** field. This information is used to identify the individual item installs as listed in the Record Work Window and the Authorize Item Installs Window.

10. Enter any comment(s) concerning the new item in the **Comment** field.

11. Click on the **Save Button** [Save] at the bottom of the window.

12. If recording another installation of the **same** pay item is desired at this time, click on the **Add Button** [Add] and repeat steps 5-11.

13. Click on the **Close Button** [Close] at the bottom of the window.

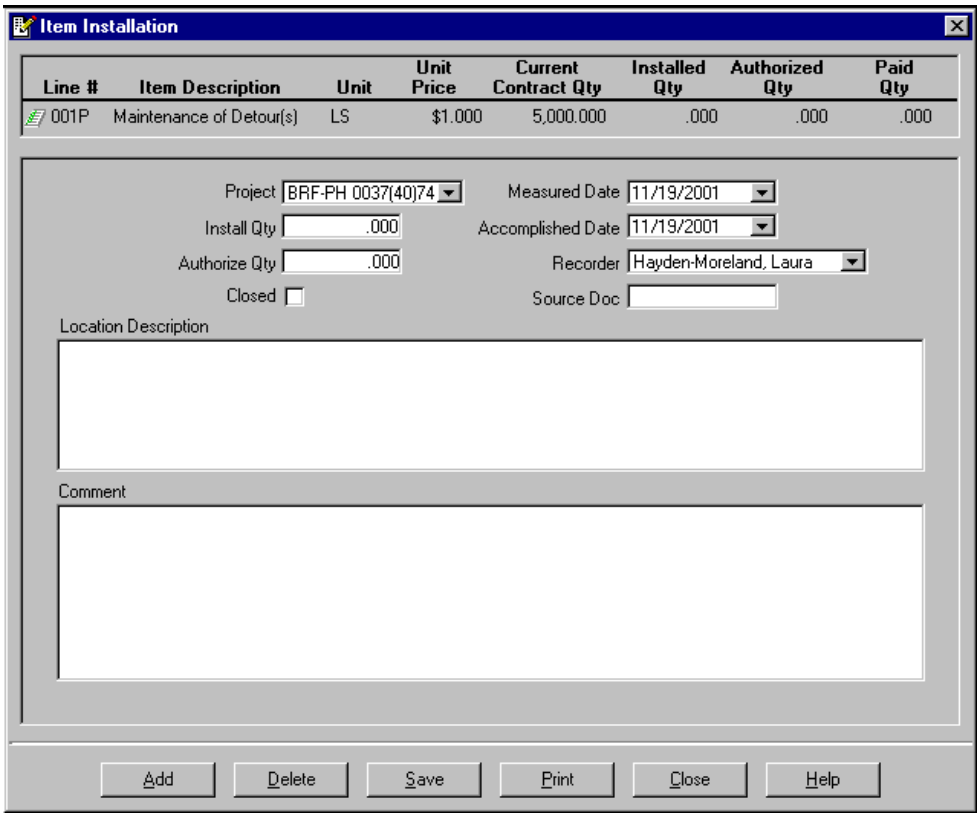
> If recording another installation of a **different** pay item is desired at this time, refer to Record an Additional Item Installation.

Record an Additional Item Installation

When an item installation is completed, to complete another for a different pay item, perform the following steps.

1. Return to the Record Work Window.
2. Select the desired **pay item** in the tree panel.
3. Click on the **Item Installation Button** .

   The Item Installation Window appears as shown below.



5. Enter the install quantity in the **Install Qty** field.
6. Change the dates in the **Measured Date** and/or **Accomplished Date** fields (if necessary) by selecting the appropriate date(s) from the fields' drop-down lists.
7. Change the name in the **Recorder** field (if necessary) by selecting the appropriate name from the field's drop-down list.
8. Enter the source document (if any) in the **Source Doc** field.

9. Enter any station number(s) or other descriptive information in the **Location Description** field. This information is used to identify the individual item installs as listed in the Record Work Window and the Authorize Item Installs Window.

10. Enter any comment(s) concerning the new item in the **Comment** field.

11. Click on the **Save Button** [Save] at the bottom of the window.

12. If recording another installation of the **same** pay item is desired at this time, click on the **Add Button** [Add] and repeat steps 5-11.

13. Click on the **Close Button** [Close] at the bottom of the window.

14. Repeat steps 1-13 as desired for further different additional item installations.

Edit an Item Installation

To edit an item installation, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Record Work Button** .

   The Record Work Window appears below the Record Work Toolbar.

2. Select (highlight) the desired **project** in the tree panel if more than one is included in the contract.

   The project's pay items display below the project folder in the tree panel.

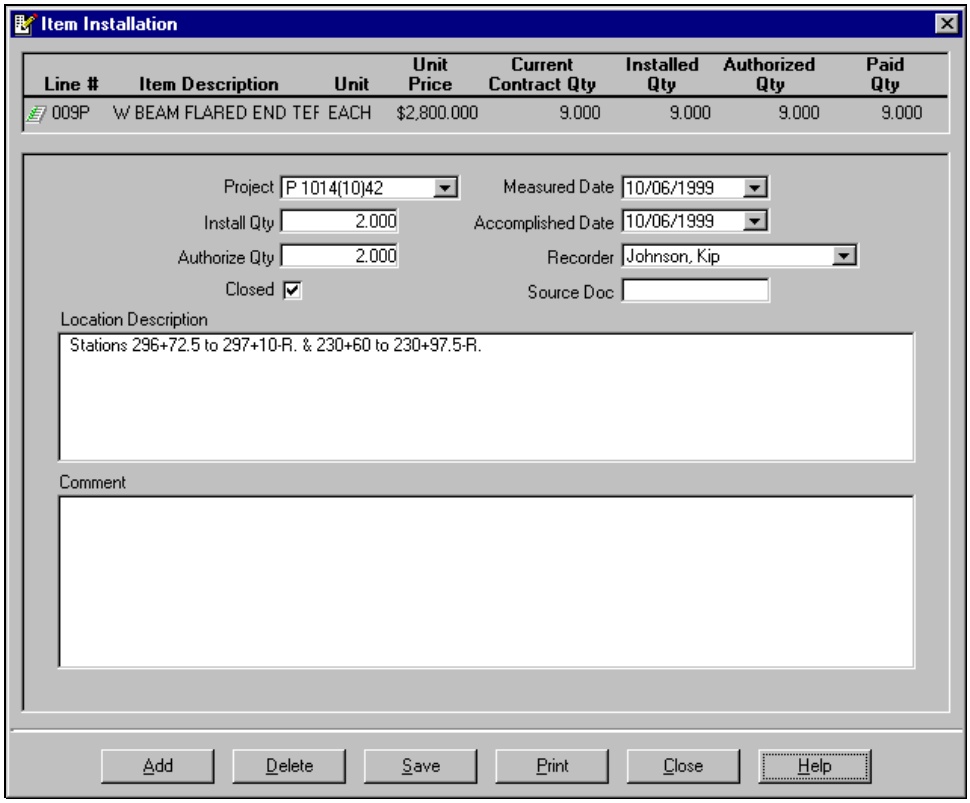
3. Select the desired **pay item** in the tree panel.

   The item installs recorded for that pay item appear in the list panel.

4. Select the desired **item installation** in the list panel.

5. Click on the **Item Installation Button** .

   The Item Installation Window appears with the item installation's recorded information as shown below.



5. Edit the information displayed as desired.

6. Enter any comment(s) concerning the changed item in the **Comment** field if necessary.

7. Click on the **Save Button** [Save] at the bottom of the window.

8. Click on the **Close Button** [Close] at the bottom of the window.

Delete an Item Installation

The need to delete an item installation is rare, but it is occasionally necessary. To delete an item installation, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Record Work Button** .

   The Record Work Window appears below the Record Work Toolbar.

2. Select (highlight) the desired **project** in the tree panel if more than one is included in the contract.

   The project's pay items display below the project folder in the tree panel.

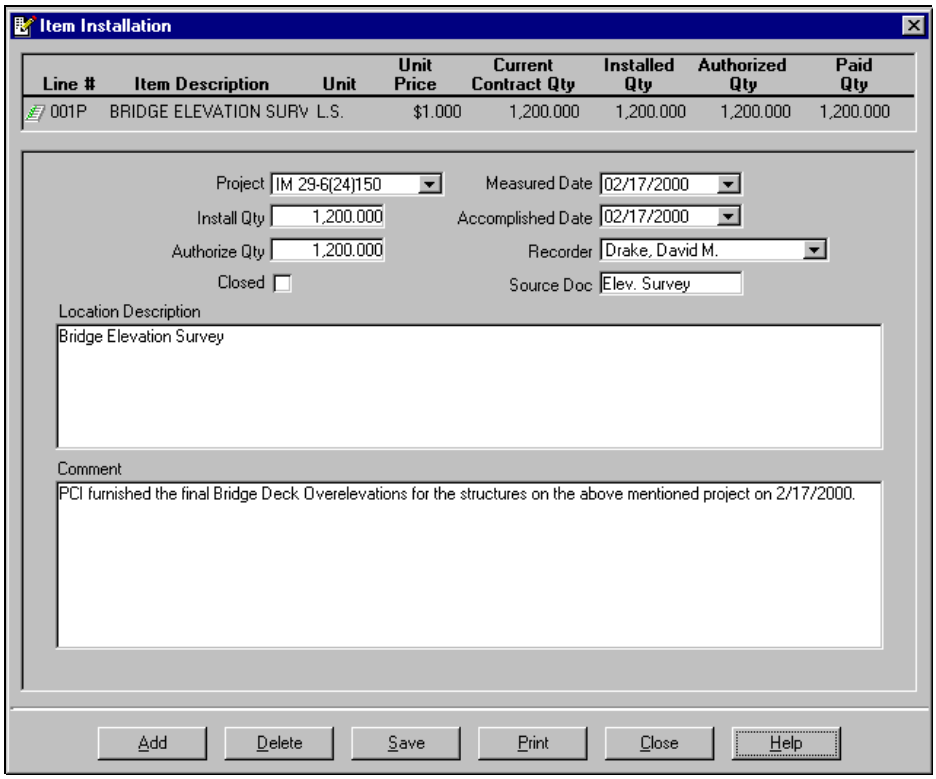
3. Select the desired **pay item** in the tree panel.

   The item installs recorded for that pay item appear in the list panel.

4. Select the desired **item installation** in the list panel.

5. Click on the **Item Installation Button** .

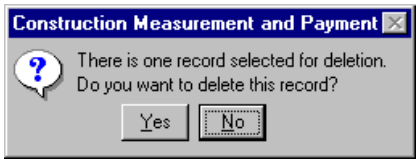
   The Item Installation Window appears with the item installation's recorded information as shown below.



6. Verify that this is the desired item installation to delete.

7. Click on the **Delete Button** [Delete] at the bottom of the window.

   CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** [No] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] enters the deletion command into the CM&P System.



8. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

9. Click on the **Save Button** [Save] at the bottom of the window.

   The deletion just made is now recorded.

10. Click on the **Close Button** [Close] at the bottom of the window.

Close an Item Installation

Closing an item installation indicates agreement with the quantity in the item installation.

Users may choose to close many item installations as they are grouped into pay items at once (refer to Close Pay Items), or to authorize and close item installs both at once (refer to Authorize and Close Item Installations), but there are times when it is best to close item installations individually from the Item Installation Window.

To close an item installation from the Item Installation Window, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Record Work Button** .

   The Record Work Window appears below the Record Work Toolbar.

2. Select (highlight) the desired **project** in the tree panel if more than one is included in the contract.

   The project's pay items display below the project folder in the tree panel.

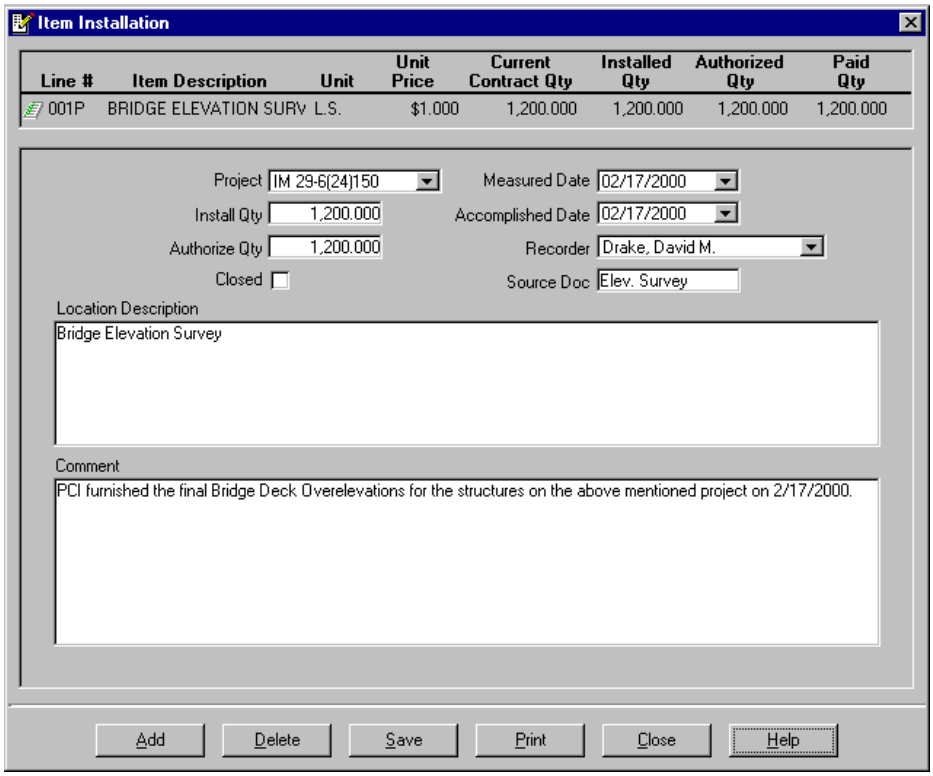
3. Select the desired **pay item** in the tree panel.

   The item installs recorded for that pay item appear in the list panel.

4. Select the desired **item installation** in the list panel.

5. Click on the **Item Installation Button** .

The Item Installation Window appears with the item installation's recorded information as shown below.



6. Click on the **Closed** checkbox

   A checkmark appears in the checkbox.

7. Enter any comment(s) concerning the closed item in the **Comment** field if necessary.

8. Click on the **Save Button** [Save] at the bottom of the window.

9. Click on the **Close Button** [Close] at the bottom of the window.

   CM&P returns to the Record Work Window. A checkmark appears in the **Closed** column of the item installation that was just closed.

If users manually authorize item installations, they must manually close them.

Recorders cannot make changes after authorization and closing.

Reopen an Item Installation

To reopen an item installation, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Record Work Button** .

   The Record Work Window appears below the Record Work Toolbar.

2. Select (highlight) the desired **project** in the tree panel if more than one is included in the contract.

   The project's pay items display below the project folder in the tree panel.

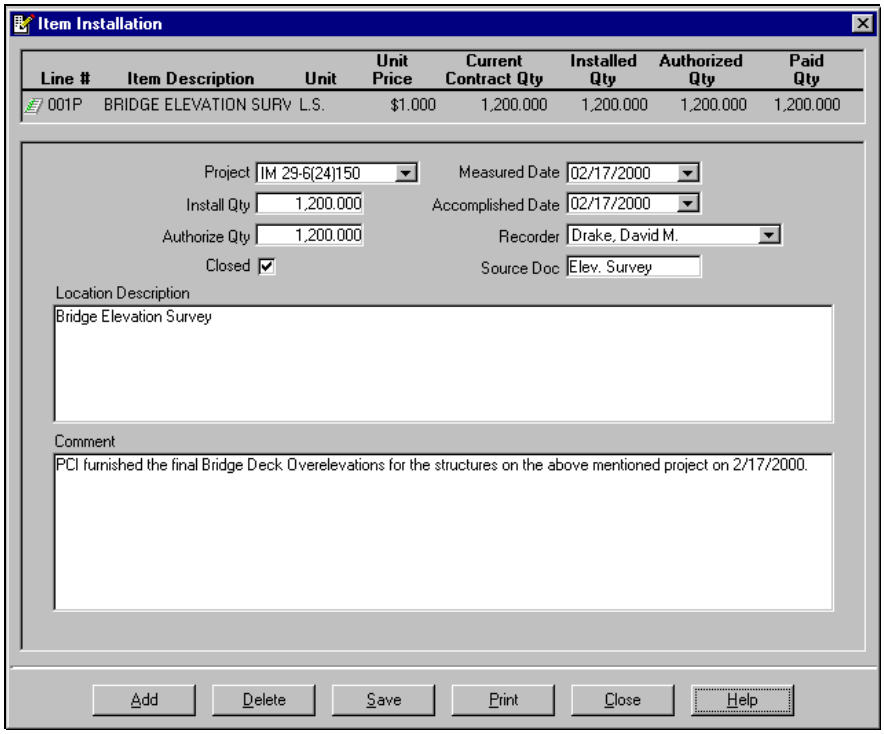
3. Select the desired **pay item** in the tree panel.

   The item installs recorded for that pay item appear in the list panel.

4. Select the desired **item installation** in the list panel.

5. Click on the **Item Installation Button** .

   The Item Installation Window appears with the item installation's recorded information as shown below.



6. Click on the **Closed** checkbox.

   The checkmark disappears from the checkbox.

7. Enter any comment(s) concerning the reopened item in the **Comment** field if necessary.

8. Click on the **Save Button** [Save] at the bottom of the window.

9. Click on the **Close Button** [Close] at the bottom of the window.

   CM&P returns to the Record Work Window. The checkmark disappears from the **Closed** column of the item installation that was just reopened.

Authorizations

Authorize a Partial Quantity on an Item Installation

To authorize a partial quantity on an item installation in the Item Installation Window, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Record Work Button** .

   The Record Work Window appears below the Record Work Toolbar.

2. Select (highlight) the desired **project** in the tree panel if more than one is included in the contract.

   The project's pay items display below the project folder in the tree panel.

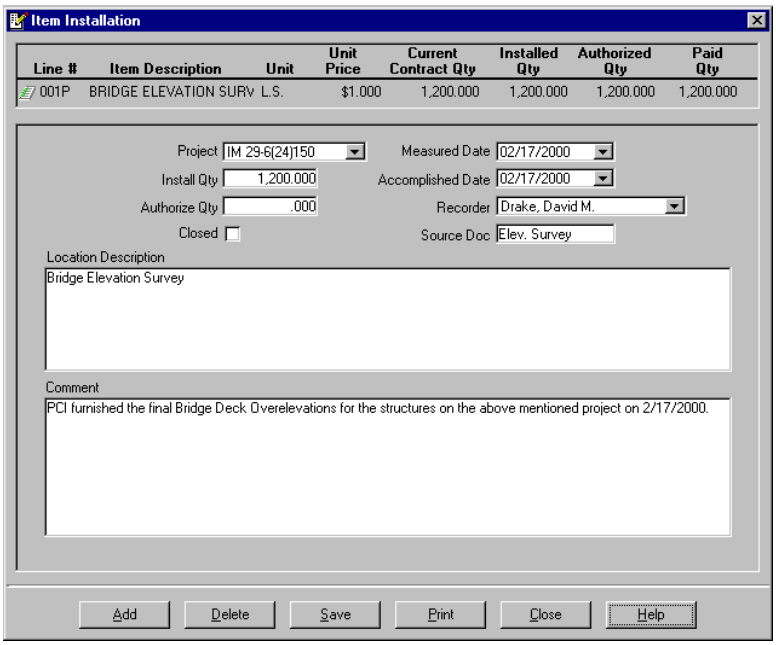
3. Select the desired **pay item** in the tree panel.

   The item installs recorded for that pay item appear in the list panel.

4. Select the desired **item installation** in the list panel.

5. Click on the **Item Installation Button** .

   The Item Installation Window appears with the item installation's recorded information as shown below.



6. Enter the quantity to authorize in the **Authorize Qty** field.
7. Enter any comment(s) concerning the authorized item in the **Comment** field if necessary.
8. Click on the **Closed** checkbox if a closed status is desired for the item installation at this time.

   A checkmark appears in the **Closed** checkbox.
9. Click on the **Save Button** [Save] at the bottom of the window.
10. Click on the **Close Button** [Close] at the bottom of the window.

If users manually authorize item installations, they must manually close them when appropriate.

Recorders cannot make changes after item installations are closed.

Authorize the Entire Quantity on an Item Installation

Users may simultaneously close and authorize the entire quantity on item installations from the Authorize Item Installs Window, or they may authorize the entire quantity on item installations (without necessarily closing them) from the Item Installation Window.

To authorize the entire quantity on an item installation from the Item Installation Window, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Record Work Button** .

   The Record Work Window appears below the Record Work Toolbar.

2. Select (highlight) the desired **project** in the tree panel if more than one is included in the contract.

   The project's pay items display below the project folder in the tree panel.

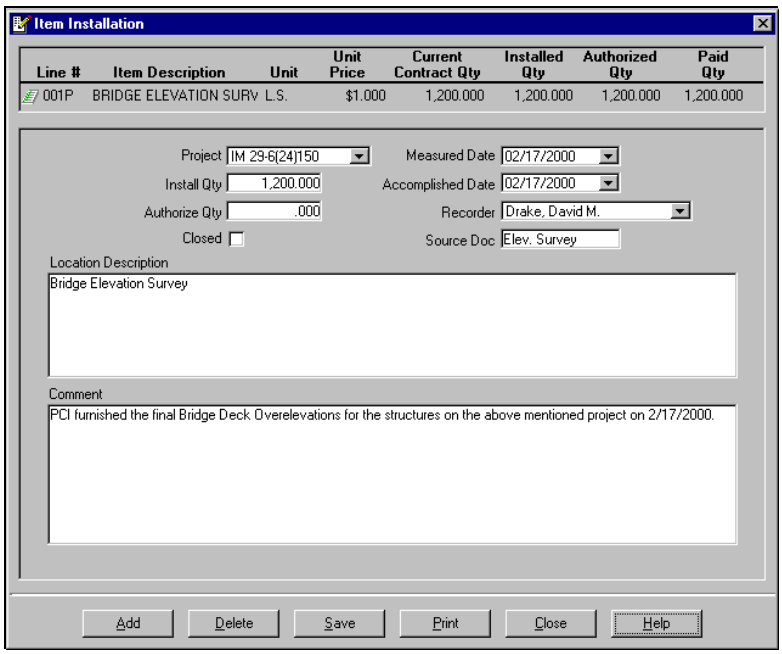
3. Select the desired **pay item** in the tree panel.

   The item installs recorded for that pay item appear in the list panel.

4. Select the desired **item installation** in the list panel.

5. Click on the **Item Installation Button** .

   The Item Installation Window appears with the item installation's recorded information.



6. Enter the same amount in the **Authorize Qty** field as appears in the **Install Qty** field.

7. Enter any comment(s) concerning the authorized item in the **Comment** field if necessary.

8. Click on the **Closed** checkbox if a closed status is desired for the item installation at this time.

   A checkmark appears in the **Closed** checkbox.

9. Click on the **Save Button** [Save] at the bottom of the window.

10. Click on the **Close Button** [Close] at the bottom of the window.

If users manually authorize item installations, they must manually close them when appropriate.

Recorders cannot make changes after item installations are closed.

Authorize and Close Item Installations

Users may choose to close many item installations (as they are grouped into pay items) at once from the Close Pay Items and/or Edit Pay Items Window, or to authorize a partial or entire quantity of an item installation in the Item Installation Window, but there are times when it is best to authorize and close item installations both at once from the Authorize Item Installs Window.

To authorize and close item installations through the Authorize Item Installs Window, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Record Work Button** .

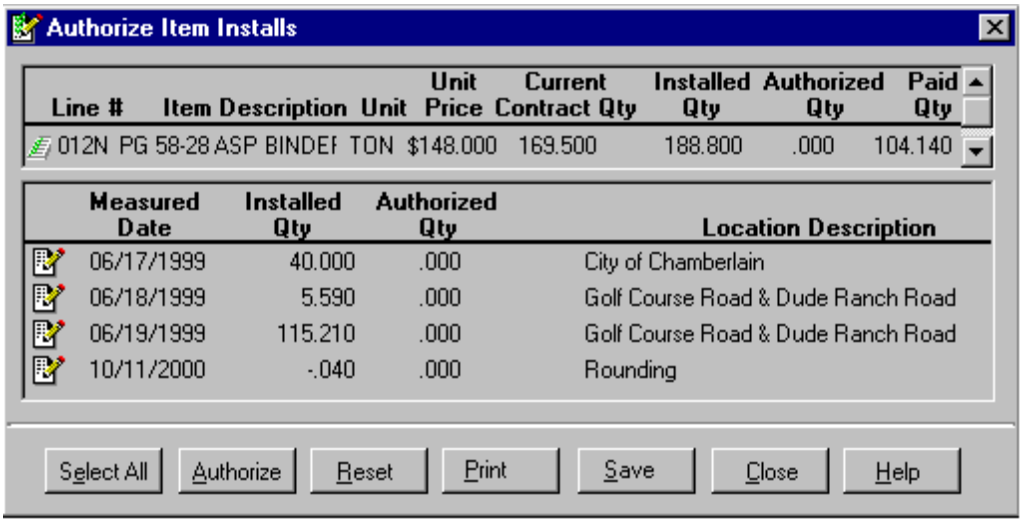
   The Record Work Window appears below the Record Work Toolbar.

2. Select (highlight) the desired **project** in the tree panel if more than one is included in the contract.

3. Select the first desired **line item** containing an installation (marked with a plus sign to the left of the line number).

4. Click on the **Authorize Item Install Button** .

   The Authorize Item Installs Window appears as shown below. If the pay item selected requires authorization (or marking as **Closed**), any install(s) recorded for it will appear in the lower panel of the window. If it does not require authorization, no item installations will appear (even if they have been recorded) and users should use the scrollbar to advance to the next item requiring attention.



5. Examine the installation(s) recorded for the line item displayed to determine whether any partial authorizations are necessary.

> If an installation should be authorized merely in part, double clicking on that installation opens the Item Installation Window for it. From this window users can authorize a partial installation, then return to the still open Authorize Item Installs Window.

6. If no partial installations are required, to **authorize only one** of a list of item installations recorded for the line item displayed in the top panel of the window, select (highlight) it and then click on the **Authorize Button** [Authorize].

   OR

   To **authorize every** installation recorded for the line item displayed in the top panel of the window, click on the **Select All Button** [Select All] and then click on the **Authorize Button** [Authorize].

7. Verify that the amounts in the **Authorized Qty** column in the lower panel are correct.

> The authorization can be reversed (with the **Reset Button** [Reset] at the bottom of the window) anytime before clicking on the **Save Button** [Save] at the bottom of the window.

8. Click on the **Save Button** [Save].

9. Use the Authorize Item Installs Window's scrollbar to advance to the next contract line item requiring authorization or closing.

10. Repeat steps 5-9 as desired for other contract line items requiring authorization.

11. Click on the **Close Button** [Close].

> By using this window to authorize an entire quantity, the item installations are automatically closed. Moving to the Item Installation Window to authorize partial quantities will not close the item installation.

> Recorders cannot make changes after item installations are closed.

10. Pay Estimates

The Pay Estimate Window is reached through the **Pay Estimate Button** on the Frame bar Toolbar or through the menu path: **Goto, Pay Estimate**. Within this window, users can create pay estimates within the CM&P System. Using buttons on the Pay Estimate Toolbar shown below, users can add, edit, or delete pay estimate items. They can authorize pay estimate items partially, individually, or en masse. They can also create, edit, or delete stockpiles and/or price adjustments.

The **Print Button** allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **Pay Estimate Button** on the Pay Estimate Window Toolbar opens the Pay Estimate Maintenance Window.

The **Pay for All Button** allows users to pay all as of yet unpaid pay items recorded.

The **Pay Estimate Item Button** opens the Pay Estimate Item Maintenance Window, within which users can create, edit, and delete pay estimate items.

The **Stockpile Button** allows users to access the Stockpile Maintenance Window, in which they can create, edit, or delete a stockpile.

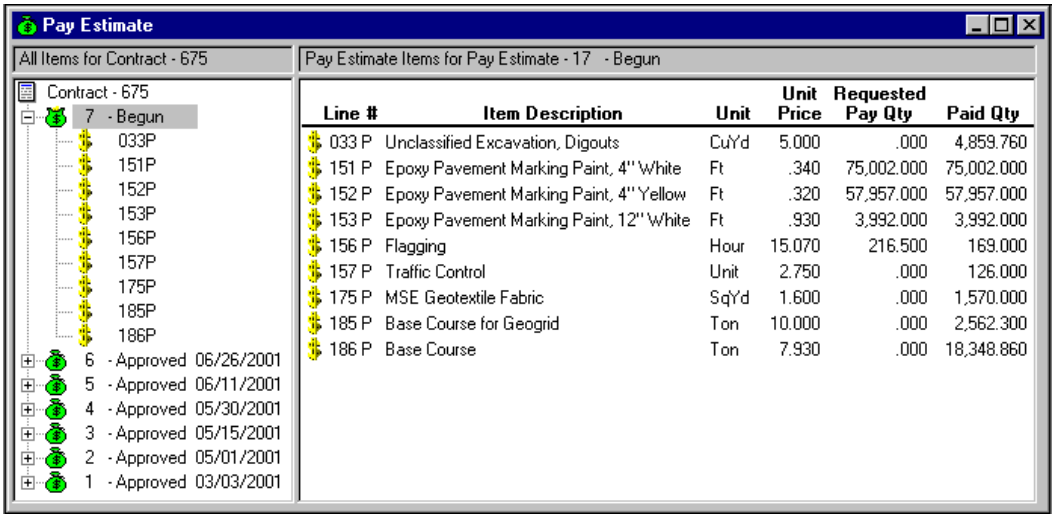
The **Price Adjustment Button** allows users to access the Price Adjustment Maintenance Window, in which they can create, edit, and delete price adjustments.

The **Help Button** allows users to retrieve help from the application's online help file. If the specific information required is not supplied immediately, try searching the Help Topics panel to the left of the main Help panel.

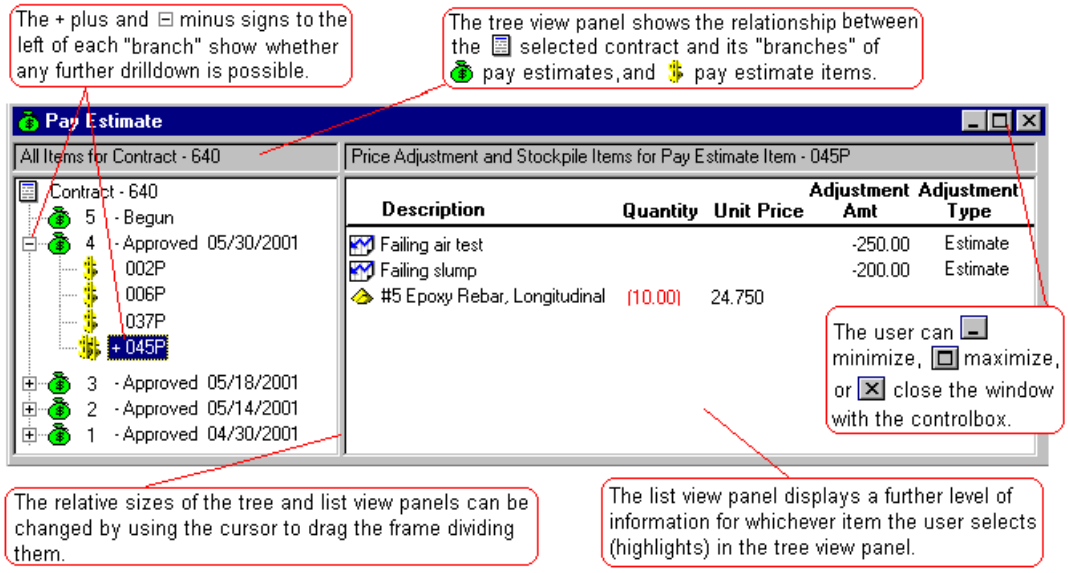
The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.

Pay Estimate Window

When first opened, the Pay Estimate Window displays the item descriptions, units, unit prices, requested pay quantities, and paid quantities for the line items included on the current pay estimate as shown below.



Selecting (highlighting) a desired pay estimate item in the tree panel causes the Pay Estimate Window to display as shown in the drilled down and annotated example below.



Pay Estimates

Create a Pay Estimate

> A new pay estimate is automatically created each time an approval date is recorded for the preceding pay estimate, until the Final Pay Estimate is approved. At that point, an additional pay estimate would become a Supplemental Pay Estimate.

To enter information into a new pay estimate, perform the following steps.

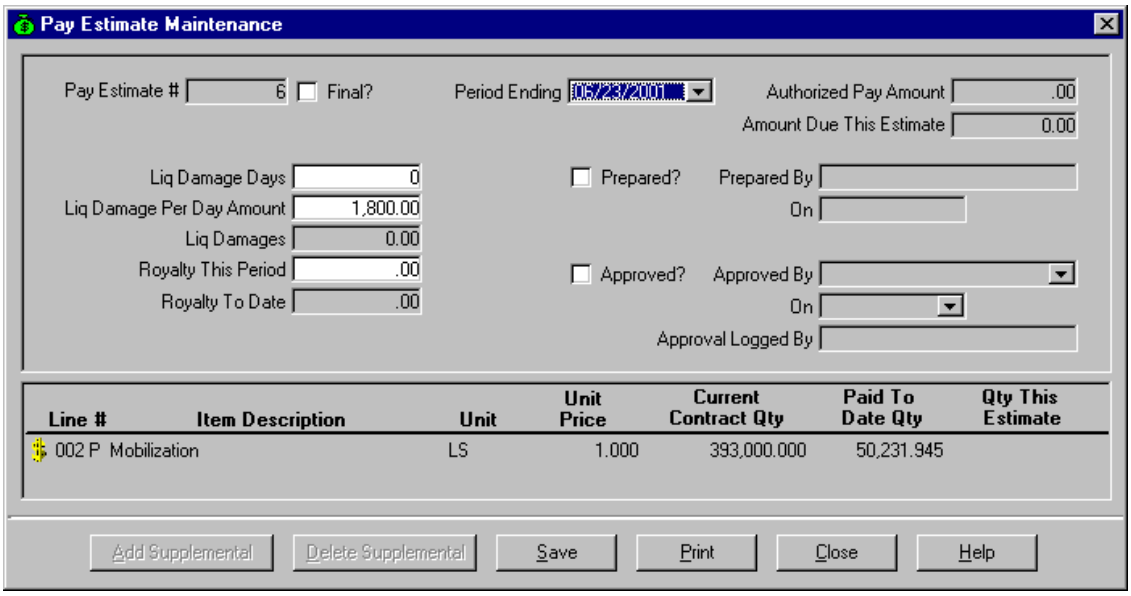
1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button**.

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Select (highlight) the most recent pay estimate in the tree panel if necessary.

3. Click on the **Pay Estimate Maintenance Button**.

   The Pay Estimate Maintenance Window appears as shown below.



4. Click on the **Final?** checkbox if this is the last pay estimate and it can be finalled.

5. Verify that the date supplied in the **Period Ending** field is the correct period ending date for the pay estimate. If necessary, use the field's dropdown calendar to select the correct date.

6. If necessary (and possible at this time), enter the number of assessed days in the **Liq Damage Days** field.

7. Verify that the amount supplied in the **Liq Damages Per Day Amount** field is correct. If necessary, enter the correct amount.

8. If necessary (and possible at this time), enter the royalty payment amount for the current period in the **Royalty This Period** field.

9. Click on the **Save Button** Save.

10. Click on the **Close Button** Close.

> A new pay estimate contains no pay estimate items. Users must create its pay estimate items or use the **Pay for All Button** to generate them.

> Users cannot delete a pay estimate. However, because contractors receive payment throughout the contract, there is no need to delete a pay estimate.

Edit a Pay Estimate

> Pay estimates may be edited *only* before they are approved.

To edit a pay estimate, perform the following steps.

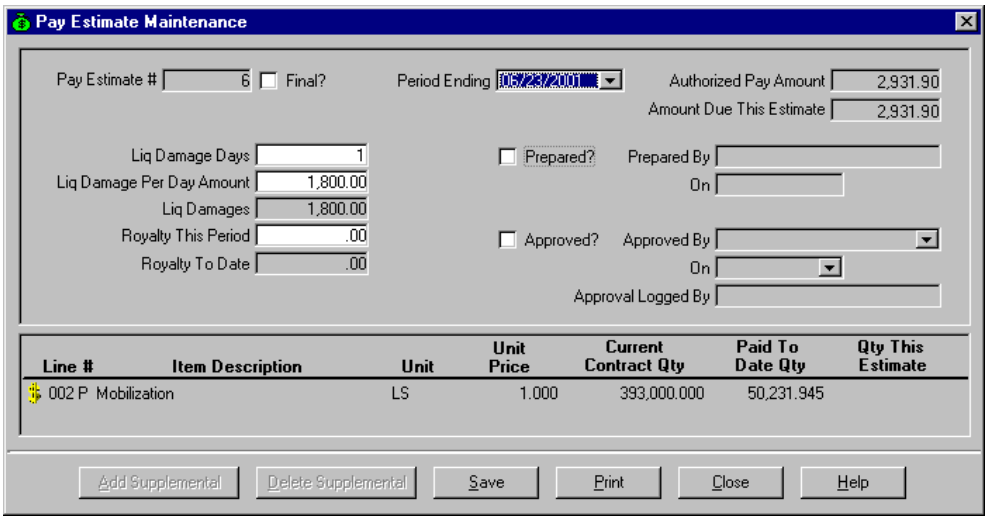
1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Select (highlight) the desired **pay estimate** in the tree panel.

3. Click on the **Pay Estimate Maintenance Button** .

   The Pay Estimate Maintenance Window appears as shown below.



4. Edit the information as desired.

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

> Users cannot delete a pay estimate. However, because contractors receive payment throughout the contract, there is no need to delete a pay estimate.

Mark a Pay Estimate as Prepared

To mark a pay estimate as prepared, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

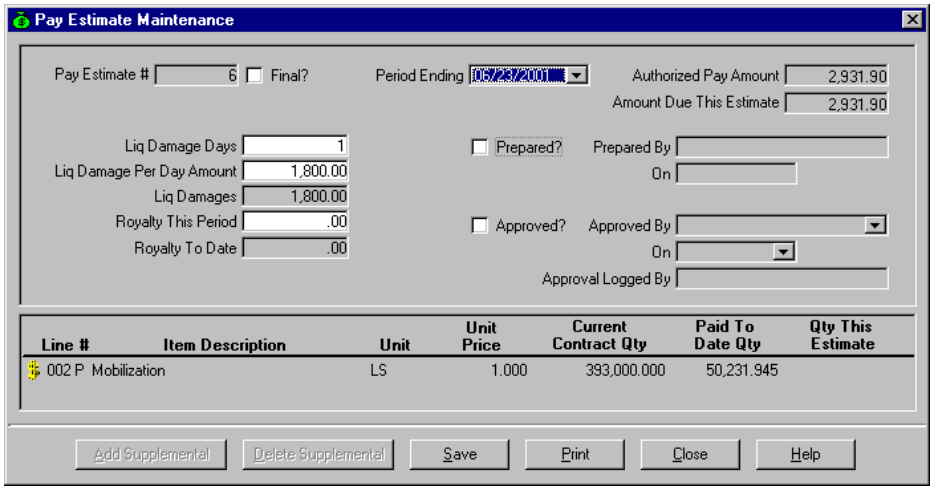
2. Select (highlight) the desired **pay estimate** in the tree panel.

   The associated pay estimate items are displayed in the right panel.

3. Verify that all the pay estimate items are complete and correct as listed.

4. Click on the **Pay Estimate Maintenance Button** .

   The Pay Estimate Maintenance Window appears as shown below.



5. Verify that the information displayed is correct.

6. Enter royalty deductions and/or liquidated damage days to be assessed if desired.

7. Click on the **Prepared?** checkbox.

   The **Prepared By** and **On** fields are completed automatically.

8. Click on the **Save Button** Save at the bottom of the window.

9. Click on the **Close Button** Close at the bottom of the window.

> The **Prepared?** checkbox must be marked before the **Approved?** checkbox can be marked, but it can be clicked on and the mark removed as long as the **Approved?** checkbox has not yet been marked.

Approve a Pay Estimate

To approve a pay estimate, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

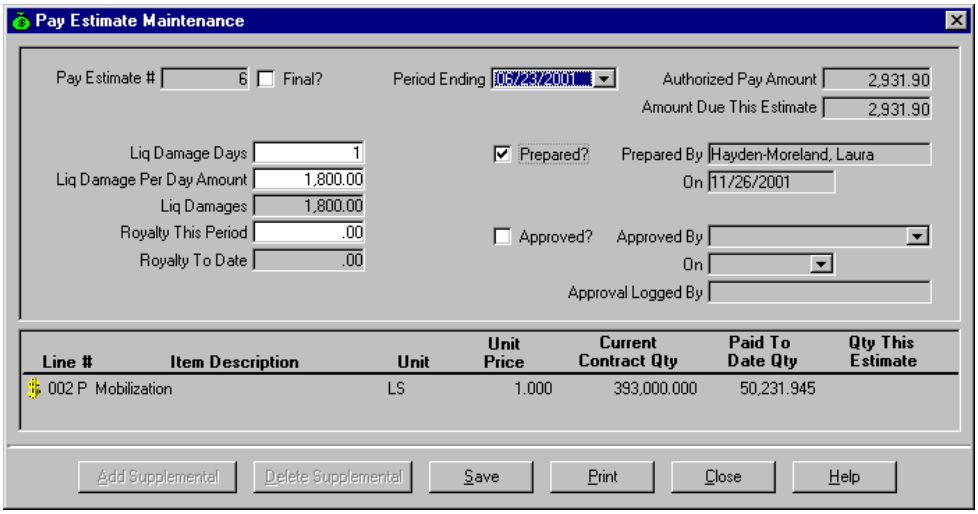
2. Select (highlight) the desired **pay estimate** in the tree panel.

   The pay estimate items associated with the pay estimate selected are displayed in the right panel.

3. Verify that all the pay estimate items are correct as listed. If necessary, edit pay estimate items for the pay estimate.

4. Click on the **Pay Estimate Maintenance Button** .

   The Pay Estimate Maintenance Window appears as shown below.



5. Verify that the information displayed is correct.

6. Enter or edit royalty deductions and/or liquidated damage days to be assessed if desired.

7. Click on the **Approved?** checkbox.

   The **Approved By, On,** and **Approval Logged By** fields are all completed automatically. The name of the person currently logged on is automatically entered in the **Approved By** and **Approval Logged By** fields. The **Approved By** field can be changed (click on the downward-pointing arrow in the field, and select the appropriate name from the resulting dropdown list); the **Approval Logged By** field cannot be changed. The **On** field contains the date on which the approval was made. The current date is automatically entered in this field. However, this field can be changed in the same way as the **Approved By** field.

8. Click on the **Save Button** Save at the bottom of the window.

9. Click on the **Close Button** [Close] at the bottom of the window.

> The **Prepared?** checkbox must be marked before the **Approved?** checkbox can be marked. Also, if this pay estimate is marked Final or Supplemental, there must be a corresponding Final or Supplemental CCO that has already been approved before the **Approved?** checkbox can be marked.

> Once the final pay estimate is approved, any other pay estimate for the contract must be created manually as a supplemental pay estimate.

Add Liquidated Damages

A contractor is financially penalized for each day that a contract goes beyond the end date specified in the contract. The amount for which the contractor is to be penalized -- the liquidated damage amount -- is defined at the beginning of a contract using the **Identifying Tab** in the Manage Contract Window. Liquidated damages are assessed in the Pay Estimate Maintenance Window and can be done while creating, editing, preparing or approving a pay estimate.

To add liquidated damages to a pay estimate, perform the following steps.

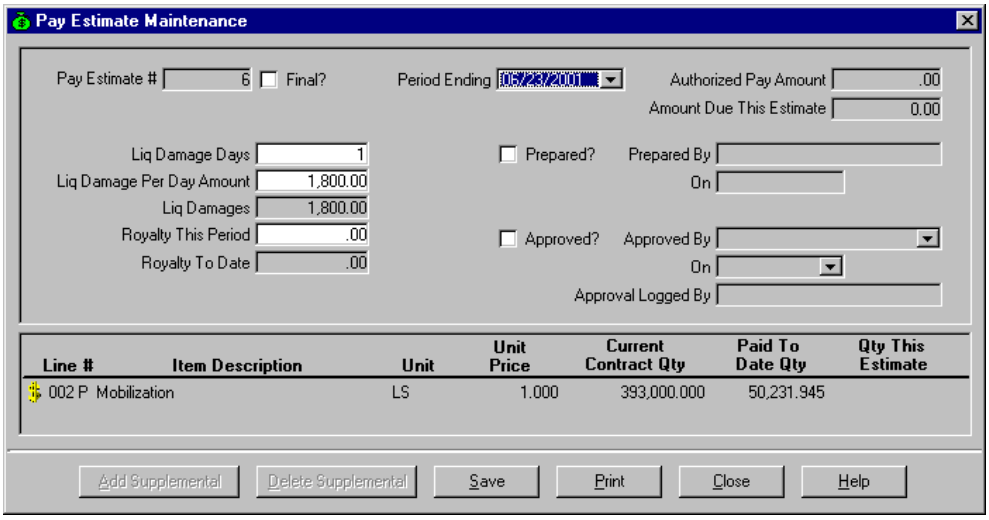
1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Select (highlight) the desired **pay estimate** in the tree panel.

3. Click on the **Pay Estimate Maintenance Button** .

   The Pay Estimate Maintenance Window appears as shown below.



4. Enter the desired number of days in the **Liquidated Damage Days** field.

   CM&P automatically displays the liquidated damages as shown above.

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

Add Royalty Deductions

When a contractor uses material from a landowner's property, the contractor has the option of having the state pay the landowner for the material. This material is, of course, the responsibility of the contractor, so the payment made by the state is withheld from the payments made to the contractor. This is termed a royalty deduction and is handled using the Pay Estimate Maintenance Window while creating, editing, preparing or approving a pay estimate.

To add royalty deductions to a pay estimate, perform the following steps.

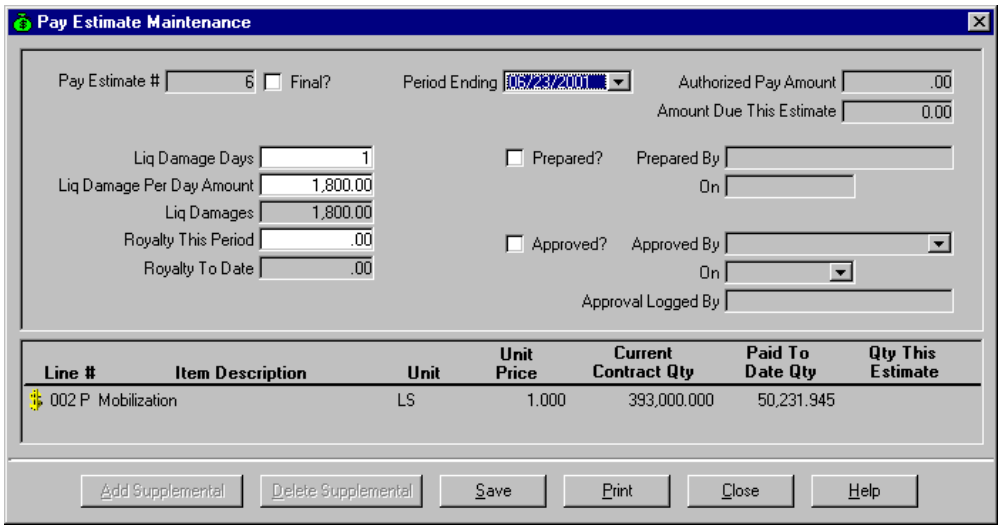
1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Select (highlight) the desired **pay estimate** in the tree panel.

3. Click on the **Pay Estimate Maintenance Button** .

   The Pay Estimate Maintenance Window appears as shown below.



4. Enter the desired amount in the **Royalty to Date** field.

   CM&P automatically displays the royalty to date.

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

Create a Final Pay Estimate

To create a final pay estimate, perform the following steps.

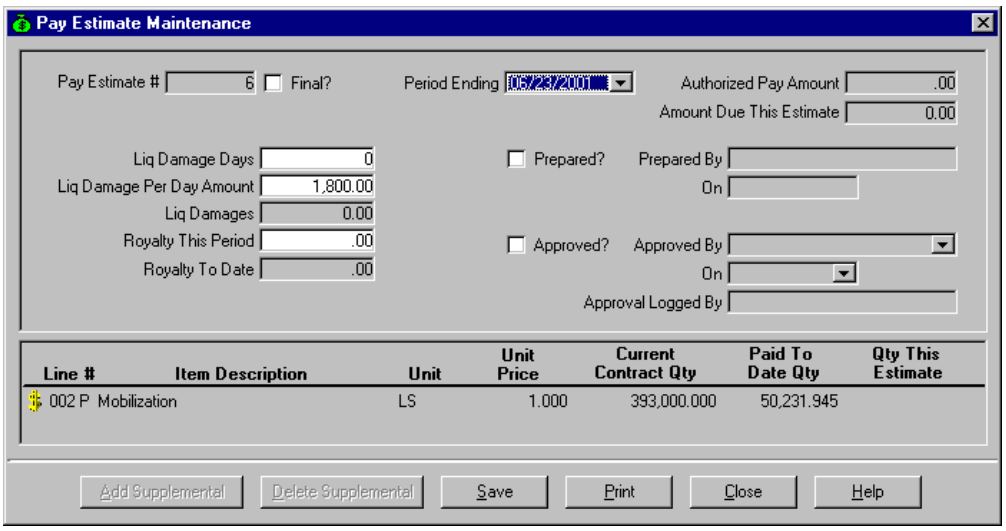
1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Select (highlight) the most recent pay estimate in the tree panel if necessary.

3. Click on the **Pay Estimate Maintenance Button** .

   The Pay Estimate Maintenance Window appears as shown below.



4. Click on the **Final?** checkbox.

5. Verify that the date supplied in the **Period Ending** field is the correct period ending date for the pay estimate. If necessary, use the field's dropdown calendar to select the correct date.

6. If necessary (and possible at this time), enter the number of assessed days in the **Liquidated Damage Days** field.

7. Verify that the amount supplied in the **Liquidated Damages Per Day Amount** field is correct. If necessary, enter the correct amount.

8. If necessary (and possible at this time), enter the royalty payment amount for the current period in the **Royalty This Period** field.

9. Click on the **Save Button** Save.

10. Click on the **Close Button** Close.

Only the expected last pay estimate of a contract needs to be or can be finalled.

Because this pay estimate is marked Final, there must be a corresponding Final CCO that has already been approved before the **Approved?** checkbox here can be marked. Also, once the final pay estimate is approved, any other pay estimate for the contract must be created manually as a supplemental pay estimate.

Create a Supplemental Pay Estimate

To create a supplemental pay estimate, perform the following steps.

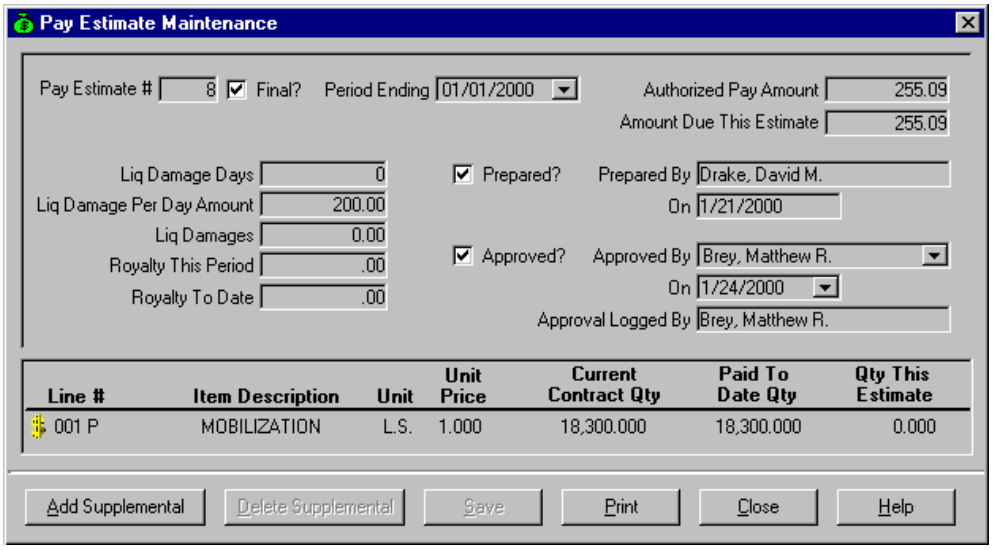
1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Select (highlight) the most recent pay estimate in the tree panel if necessary.

3. Click on the **Pay Estimate Maintenance Button** .

   The Pay Estimate Maintenance Window appears as shown below.



4. Click on the **Add Supplemental Button** Add Supplemental.

   The **Final?** checkbox is replaced by a field marked **Supplemental**, while the rest of the appropriate fields become blank and available for entries.

5. Verify that the date supplied in the **Period Ending** field is the correct period ending date for the pay estimate. If necessary, use the field's dropdown calendar to select the correct date.

6. If necessary (and possible at this time), enter the number of assessed days in the **Liquidated Damage Days** field.

7. Verify that the amount supplied in the **Liquidated Damages Per Day Amount** field is correct. If necessary, enter the correct amount. (Even though the field is gray, an entry can be made on a supplemental pay estimate.)

8. If necessary (and possible at this time), enter the royalty payment amount for the current period in the **Royalty This Period** field.

9. Click on the **Save Button** Save.

10. Click on the **Close Button** [Close].

> Because this pay estimate is marked Supplemental, there must be a corresponding Supplemental CCO that has already been approved before the **Approved?** checkbox here can be marked.

Pay for All Process

The **Pay for All Button** allows users to quickly create the items in a pay estimate. If users choose to use this process, a pay estimate item will be created for every contract pay item for which authorized install quantities exist that have not had pay requests made for them. The quantity for each new pay estimate item will be the difference between its **Authorized Install Quantity** and any **Requested Pay Quantity**.

> Any pay estimate items that already exist for the pay estimate before using the pay for all process will not be effected by it. Quantities automatically generated by using the **Pay for All Button** may still be changed (or the pay estimate items deleted all together) in the Pay Estimate Item Maintenance Window.

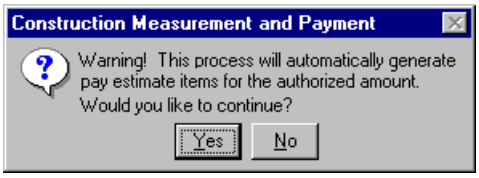
To use the pay for all process, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Click on the **Pay for All Button** .

   CM&P displays a warning message as in the example below. Clicking on the **No Button** No causes CM&P to return to the previous window, disregarding the pay for all command. Clicking on the **Yes Button** Yes enters the pay for all command into the CM&P System.



3. Click on the **Yes Button** Yes.

   A pay estimate item is created and displayed in the list panel for every contract pay item for which authorized install quantities exist that have not had pay requests made for them. The quantity for each new pay estimate item is the difference between its **Authorized Install Quantity** and any **Requested Pay Quantity**. Any pre-existing pay estimate items for the pay estimate are also displayed.

4. Review the pay estimate items displayed in the list panel. If necessary, adjust pay estimate item quantities or delete inappropriate pay estimate items in the Pay Estimate Item Maintenance Window.

Pay Estimate Items

Create a Pay Estimate Item

To create a pay estimate item, perform the following steps.

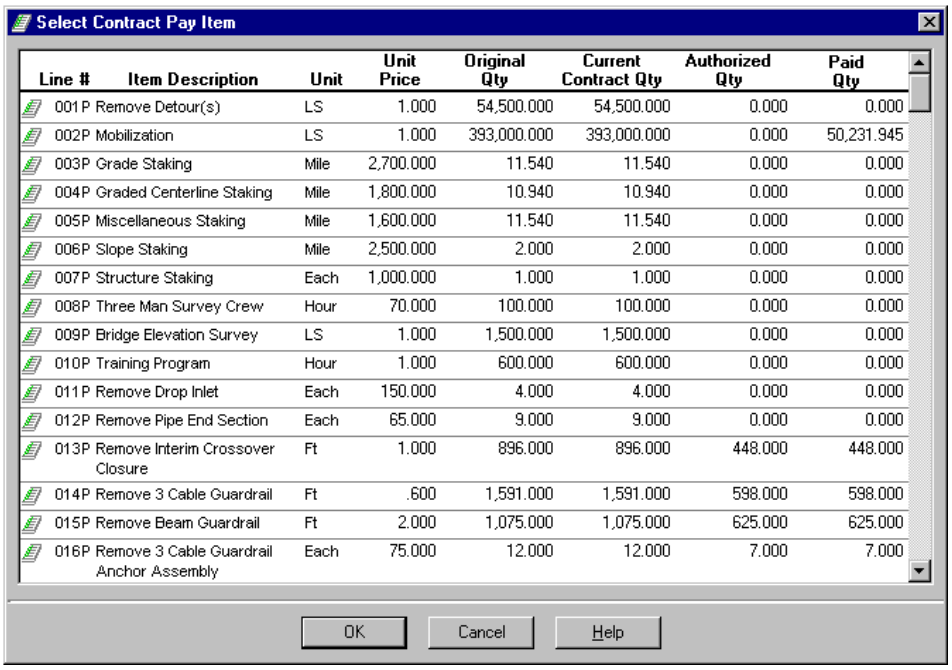
1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Click on the desired **pay estimate** in the tree panel.

3. Click on the **Pay Estimate Item Button** .

   The Select Contract Pay Item Window appears. This window displays all of the pay items associated with the selected contract as shown below.



Select Contract Pay Item

Line #	Item Description	Unit	Unit Price	Original Qty	Current Contract Qty	Authorized Qty	Paid Qty
001P	Remove Detour(s)	LS	1.000	54,500.000	54,500.000	0.000	0.000
002P	Mobilization	LS	1.000	393,000.000	393,000.000	0.000	50,231.945
003P	Grade Staking	Mile	2,700.000	11.540	11.540	0.000	0.000
004P	Graded Centerline Staking	Mile	1,800.000	10.940	10.940	0.000	0.000
005P	Miscellaneous Staking	Mile	1,600.000	11.540	11.540	0.000	0.000
006P	Slope Staking	Mile	2,500.000	2.000	2.000	0.000	0.000
007P	Structure Staking	Each	1,000.000	1.000	1.000	0.000	0.000
008P	Three Man Survey Crew	Hour	70.000	100.000	100.000	0.000	0.000
009P	Bridge Elevation Survey	LS	1.000	1,500.000	1,500.000	0.000	0.000
010P	Training Program	Hour	1.000	600.000	600.000	0.000	0.000
011P	Remove Drop Inlet	Each	150.000	4.000	4.000	0.000	0.000
012P	Remove Pipe End Section	Each	65.000	9.000	9.000	0.000	0.000
013P	Remove Interim Crossover Closure	Ft	1.000	896.000	896.000	448.000	448.000
014P	Remove 3 Cable Guardrail	Ft	.600	1,591.000	1,591.000	598.000	598.000
015P	Remove Beam Guardrail	Ft	2.000	1,075.000	1,075.000	625.000	625.000
016P	Remove 3 Cable Guardrail Anchor Assembly	Each	75.000	12.000	12.000	7.000	7.000

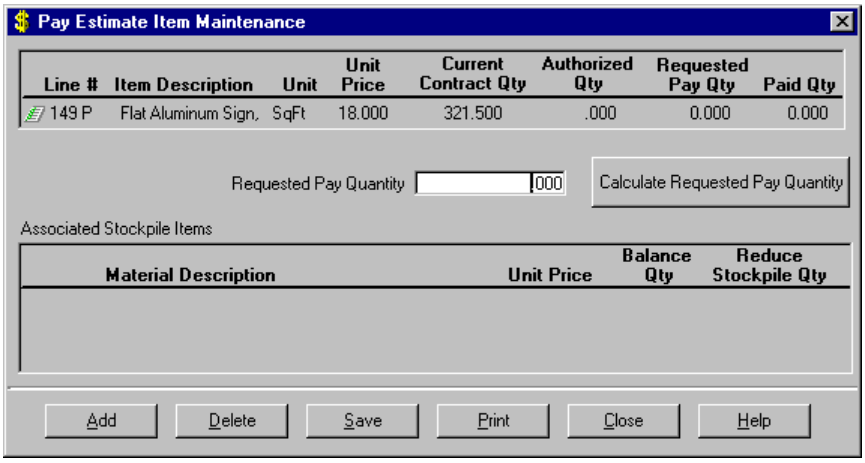
OK Cancel Help

4. Locate the desired **pay item**, using the scrollbar if necessary.

5. Select (highlight) the desired **pay item**.

6. Click on the **OK Button** OK at the bottom of the window.

The Pay Estimate Item Maintenance Window appears as shown below.



7. Enter the requested pay quantity in the **Requested Pay Quantity** field.

> Users may request any desired pay quantity, but the actual pay quantity can be at most 120% of the current contract quantity of the pay item. Request quantities over 120% are placed in the contract pay item withhold quantity. This record of the quantity originally requested when a contract change order is created allows the system to automatically pay for what couldn't be paid for previously because of an insufficient contract quantity.

OR

Click on the **Calculate Requested Pay Quantity Button** Calculate Requested Pay Quantity.

The number now displayed in the field is the quantity of authorized installed units that have not been paid for to date. (That is, the authorized install quantity minus the requested pay quantity for the pay item.)

8. Click on the **Save Button** Save.

9. Click on the **Add Button** Add and repeat steps 4-8 as desired for other pay estimate items.

> Clicking on the **Add Button** will bring up the Select Contract Pay Item Window, allowing users to choose the next item in the contract for which to pay. Clicking on the **Add Button** subsequent times will reposition users in the window at the last contract pay item selected.

10. Click on the **Close Button** Close.

> Adding a new pay estimate item to a prepared pay estimate will automatically clear the prepared status of the pay estimate. Also, adding a new pay estimate item to the current pay estimate will also automatically clear the prepared status of any unapproved final or supplemental contract change order.

Edit a Pay Estimate Item

To edit a pay estimate item, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

1. Locate the desired pay estimate in the tree panel.
2. Select (highlight) the desired **pay estimate**.

   The associated pay estimate items display in the list panel on the right.

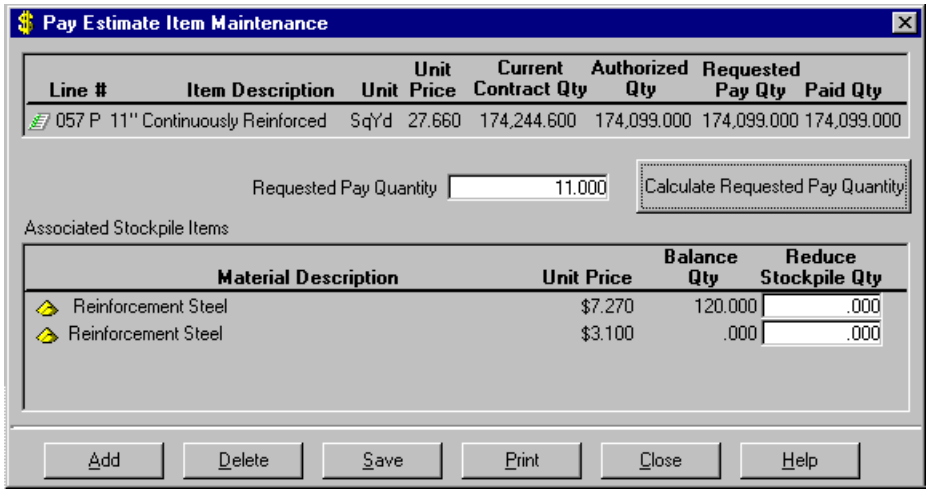
   OR

   Click on the **plus sign** to the left of the desired pay estimate.

   The associated pay estimate items appear in the tree panel below the pay estimate.

3. Locate the desired pay estimate item in the tree or list panel.
4. Select (highlight) the desired **pay estimate item**.
5. Click on the **Pay Estimate Item Button** .

   The Pay Estimate Item Maintenance Window appears as shown below.



6. Edit the information in the **Requested Pay Quantity** field as desired.
7. If information about any stockpile(s) was recorded for the pay estimate item, changes to any balance quantity can be made in the **Reduce Stockpile Quantity** field(s) as desired.

Users cannot enter a positive value in the **Reduce Stockpile Qty** field that is greater than the **Balance Qty** of the stockpile. On the other hand, users can enter any negative quantity in the **Reduce Stockpile Qty** field, which in turn will increase the **Balance Qty** of the stockpile. Entering a quantity in the **Reduce Stockpile Qty** field will create a stockpile entry for this pay estimate item with a quantity opposite to the value entered.

8. Click on the **Save Button** Save.

9. Click on the **Close Button** Close.

The numbers displayed in the **Authorized Qty, Requested Pay Qty,** and **Paid Qty** columns are cumulative.

Delete a Pay Estimate Item

> Pay estimate items which have stockpiles or price adjustments associated with them cannot be deleted. Users must first delete the stockpiles or cancel the price adjustments.

To delete a pay estimate item, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Locate the desired pay estimate in the tree panel.

3. Select (highlight) the desired **pay estimate**.

   The associated pay estimate items display in the list panel on the right.

   OR

   Click on the **plus sign** to the left of the desired pay estimate.

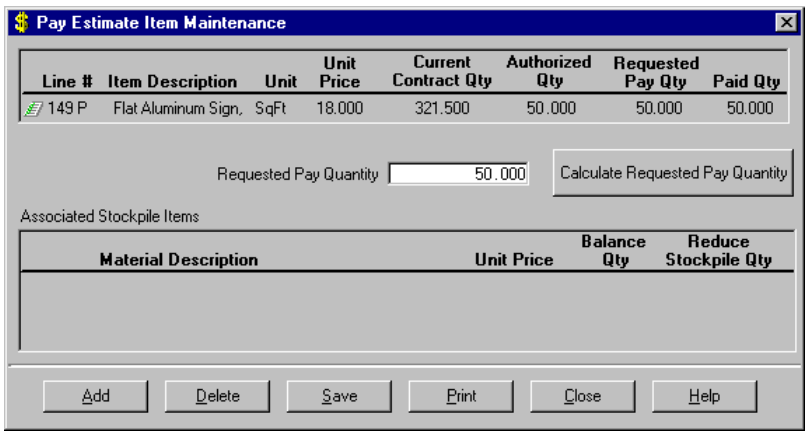
   The associated pay estimate items appear in the tree panel below the pay estimate.

4. Locate the desired pay estimate item in the tree or list panel.

5. Select (highlight) the desired **pay estimate item**.

6. Click on the **Pay Estimate Item Button** .

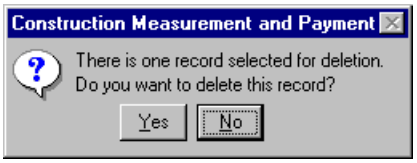
   The Pay Estimate Item Maintenance Window appears as shown below.



7. Verify that this is the desired pay estimate item to delete.

8. Click on the **Delete Button** Delete at the bottom of the window.

CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** [No] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] enters the deletion command into the CM&P System.



9. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

10. Click on the **Save Button** [Save].

    The deletion just made is now recorded.

11. Click on the **Close Button** [Close].

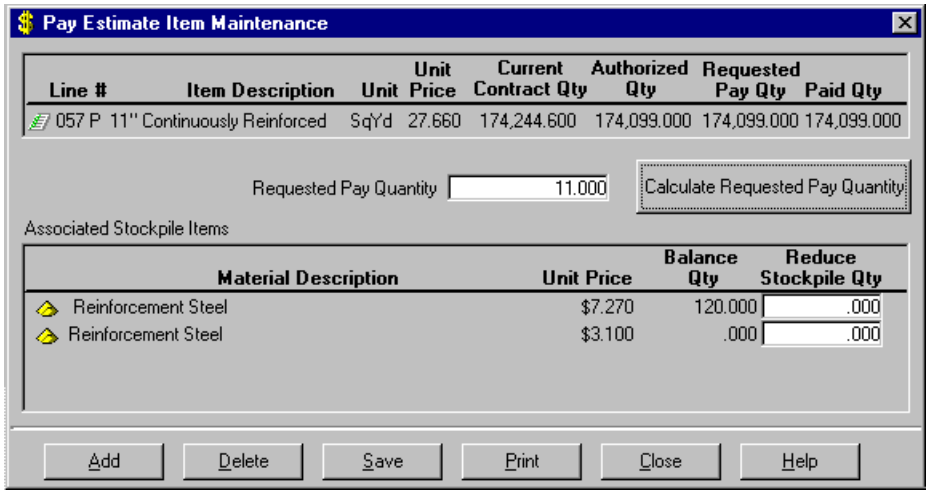
View a Pay Estimate Item

To view a pay estimate item, perform the following steps.

1. Click on the **Pay Estimate Button** .
2. Click on the **pay estimate** in the tree panel that contains the desired pay estimate item.

   The pay estimate items that correspond to the selected pay estimate appear in the right panel.
3. Click on the appropriate **pay estimate item**.
4. Click on the **Pay Estimate Item Button** .

   The Pay Estimate Item Maintenance Window appears as shown below.



5. View the desired information.
6. Click on the **Close Button** Close at the bottom of the window.

> The numbers displayed in the **Authorized Qty, Requested Pay Qty,** and **Paid Qty** columns are cumulative.

Price Adjustments

Create a Price Adjustment

To create a price adjustment, perform the following steps.

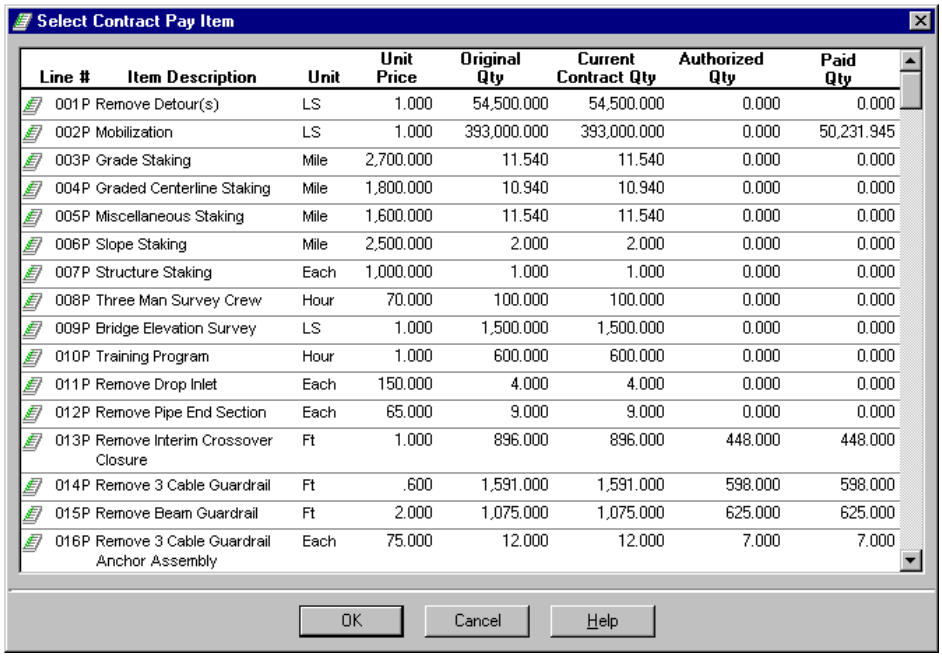
1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Select (highlight) the desired **pay estimate** in the tree panel.

3. A. If the pay estimate item for which a price adjustment is to be made has not yet been added to the pay estimate, click on the **Price Adjustment Button** .

   The Select Contract Pay Item Window appears as shown below.



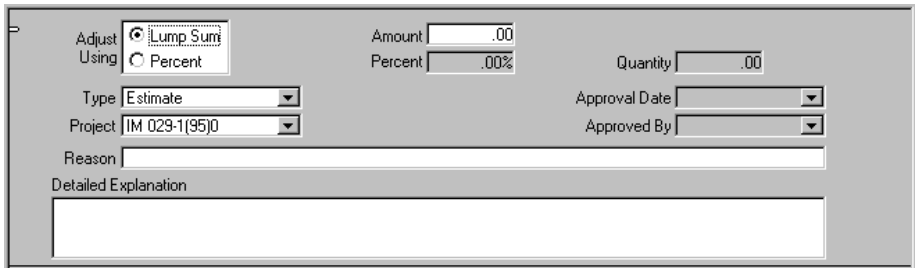
Select Contract Pay Item

Line #	Item Description	Unit	Unit Price	Original Qty	Current Contract Qty	Authorized Qty	Paid Qty
001P	Remove Detour(s)	LS	1.000	54,500.000	54,500.000	0.000	0.000
002P	Mobilization	LS	1.000	393,000.000	393,000.000	0.000	50,231.945
003P	Grade Staking	Mile	2,700.000	11.540	11.540	0.000	0.000
004P	Graded Centerline Staking	Mile	1,800.000	10.940	10.940	0.000	0.000
005P	Miscellaneous Staking	Mile	1,600.000	11.540	11.540	0.000	0.000
006P	Slope Staking	Mile	2,500.000	2.000	2.000	0.000	0.000
007P	Structure Staking	Each	1,000.000	1.000	1.000	0.000	0.000
008P	Three Man Survey Crew	Hour	70.000	100.000	100.000	0.000	0.000
009P	Bridge Elevation Survey	LS	1.000	1,500.000	1,500.000	0.000	0.000
010P	Training Program	Hour	1.000	600.000	600.000	0.000	0.000
011P	Remove Drop Inlet	Each	150.000	4.000	4.000	0.000	0.000
012P	Remove Pipe End Section	Each	65.000	9.000	9.000	0.000	0.000
013P	Remove Interim Crossover Closure	Ft	1.000	896.000	896.000	448.000	448.000
014P	Remove 3 Cable Guardrail	Ft	.600	1,591.000	1,591.000	598.000	598.000
015P	Remove Beam Guardrail	Ft	2.000	1,075.000	1,075.000	625.000	625.000
016P	Remove 3 Cable Guardrail Anchor Assembly	Each	75.000	12.000	12.000	7.000	7.000

OK Cancel Help

3.A.1. Locate and select (highlight) the desired pay estimate item, then click on the **OK Button** OK.

The Price Adjustment Maintenance Window appears as shown below.



3.A.2. Skip to step7.

OR

3. B. If the pay estimate item for which a price adjustment is to be made has already been added to the pay estimate, click on the **plus sign** to the left of the desired **pay estimate**.

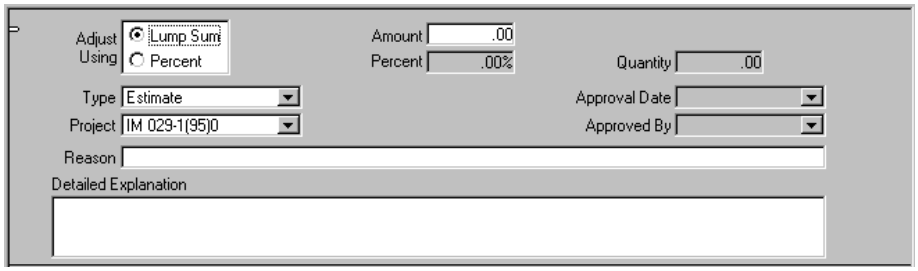
   The associated pay estimate items appear in the tree panel below the pay estimate. (Items with stockpiles and/or price adjustments display with a plus sign to their left.) Specific information about each pay estimate item appears in the list panel to aid in identifying the desired pay estimate item.

4. Locate the desired **pay estimate item**.

5. Select (highlight) the desired **pay estimate item** in the tree panel.

6. Click on the **Price Adjustment Button** .

   The Price Adjustment Maintenance Window appears as shown below.



7. Select the desired method for making the price adjustment, **Lump Sum** or **Percent**.

8. If the **Lump Sum** radio button was selected, enter the desired price adjustment amount in the **Amount** field.

   OR

   If the **Percent** radio button was selected, enter the desired price adjustment percentage in the **percent** field AND enter the desired quantity to receive the percentage price adjustment in the **Quantity** field.

Users cannot specify a price adjustment greater than the original contract quantity for the pay item.

9. Select the desired type of price adjustment from the **Type** field's dropdown listing: Estimate, Actual, or Back Out, but not Zeroed Out.

10. If **Actual** was selected for the **Type** field, the **Approval Date** and **Approved By** fields are automatically filled. Edit these fields with their dropdown calendars as necessary.

> If users select **Back Out** for the **Type** field on a price adjustment for an approved pay estimate, an offsetting price adjustment is automatically created in the current open pay estimate with **Back Out** in its **Type** field. At the same time, the original price adjustment's **Type** field is changed to **Zeroed Out**. Refer to Cancel a Price Adjustment if necessary.

11. Select the desired project from the **Project** field's dropdown listing.

12. Enter a descriptive title for the price adjustment in the **Reason** field.

> The description entered here will display on the Pay Estimate Report as well as identify the price adjustment in various CM&P windows.

13. Enter more specific information in the **Detailed Explanation** field.

14. Click on the **Save Button** [Save].

15. Click on the **Add Button** [Add] and repeat steps 7-14 for any additional price adjustments to the pay item as desired.

16. Click on the **Close Button** [Close].

Edit a Price Adjustment

> A price adjustment for an unapproved pay estimate cannot be changed to **Back Out** or **Zeroed Out** type. Instead, to remove the price adjustment amount for the pay estimate, users must delete the price adjustment.

To edit a price adjustment, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Locate the desired **pay estimate** in the tree panel.

3. Click on the **plus sign** to the left of the desired pay estimate.

   The associated pay estimate items appear in the tree panel below the pay estimate. (Items with stockpiles and/or price adjustments display with a plus sign to their left.) Specific information about each pay estimate item appears in the list panel to aid in identifying the desired pay estimate item.

4. Locate the desired **pay estimate item**.

5. Select (highlight) the desired **pay estimate item** in the tree panel.

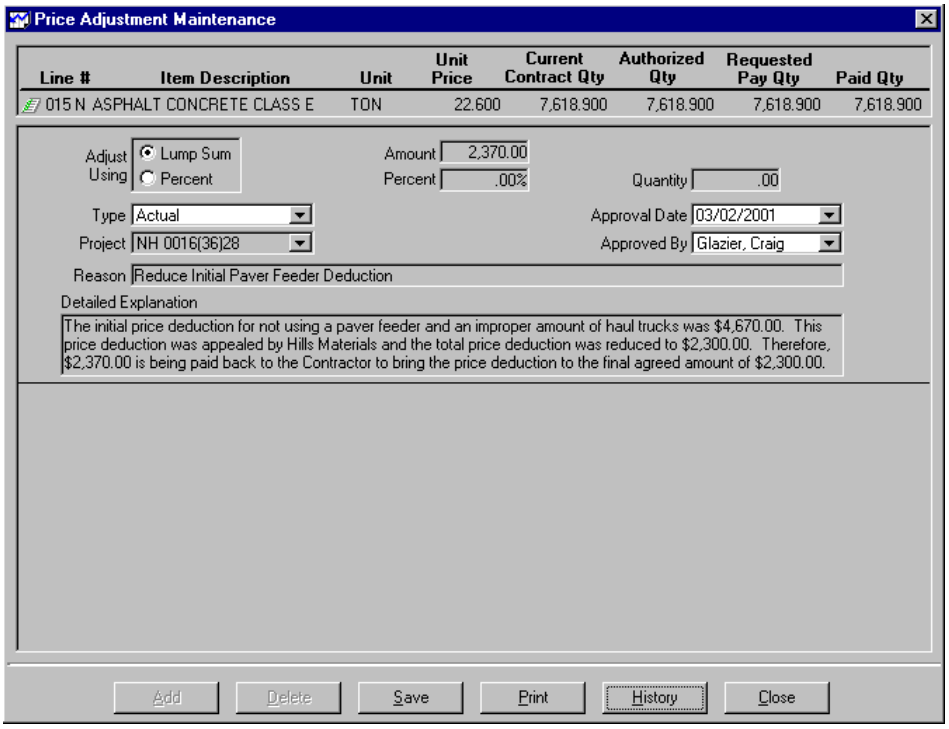
   The list panel displays the price adjustments associated with the selected pay estimate item.

6. Click on the **Price Adjustment Button** .

   OR

   Double click on the desired **price adjustment** in the list panel.

The Price Adjustment Maintenance Window appears as shown below.



7. Edit the price adjustment as desired.

> If users select **Back Out** for the **Type** field on a price adjustment for an approved pay estimate, an offsetting price adjustment is automatically created in the current open pay estimate with **Back Out** in its **Type** field. At the same time, the original price adjustment's **Type** field is changed to **Zeroed Out**. Refer to Cancel a Price Adjustment if necessary.

> If a price adjustment for an unapproved pay estimate is currently assigned to a contract change order, changing the price adjustment from **Actual** to another type will unassign it from the contract change order.

8. Click on the **Save Button** Save.

9. Click on the **Close Button** Close.

Add an Additional Price Adjustment

To add an additional price adjustment for a pay item, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Select (highlight) the desired **pay estimate** in the tree panel.

3. Click on the **plus sign** to the left of the desired **pay estimate**.

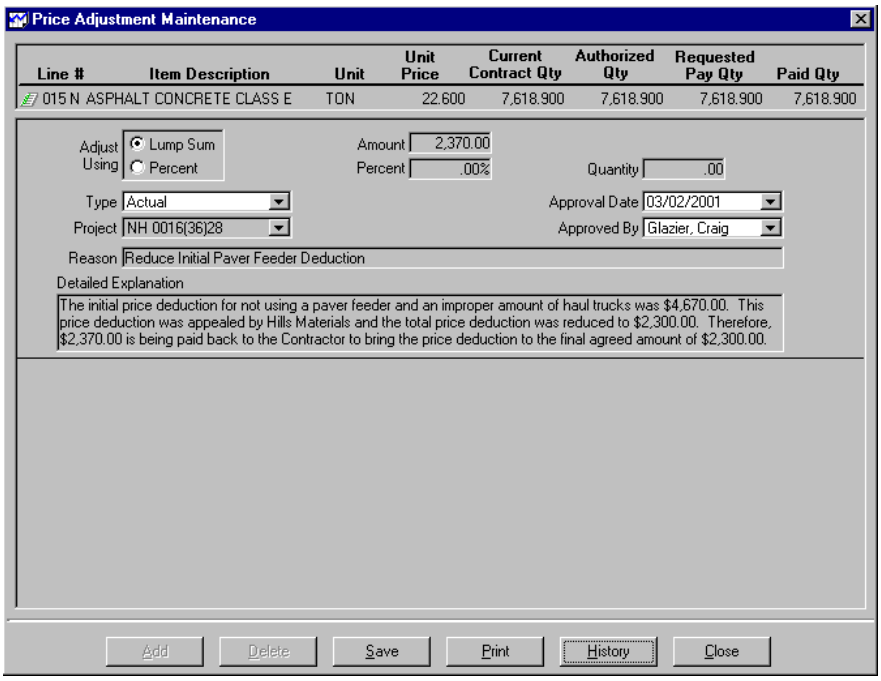
   The associated pay estimate items appear in the tree panel below the pay estimate. (Items with stockpiles and/or price adjustments display with a plus sign to their left.) Specific information about each pay estimate item appears in the list panel to aid in identifying the desired pay estimate item.

4. Locate the desired **pay estimate item**.

5. Select (highlight) the desired **pay estimate item** in the tree panel.

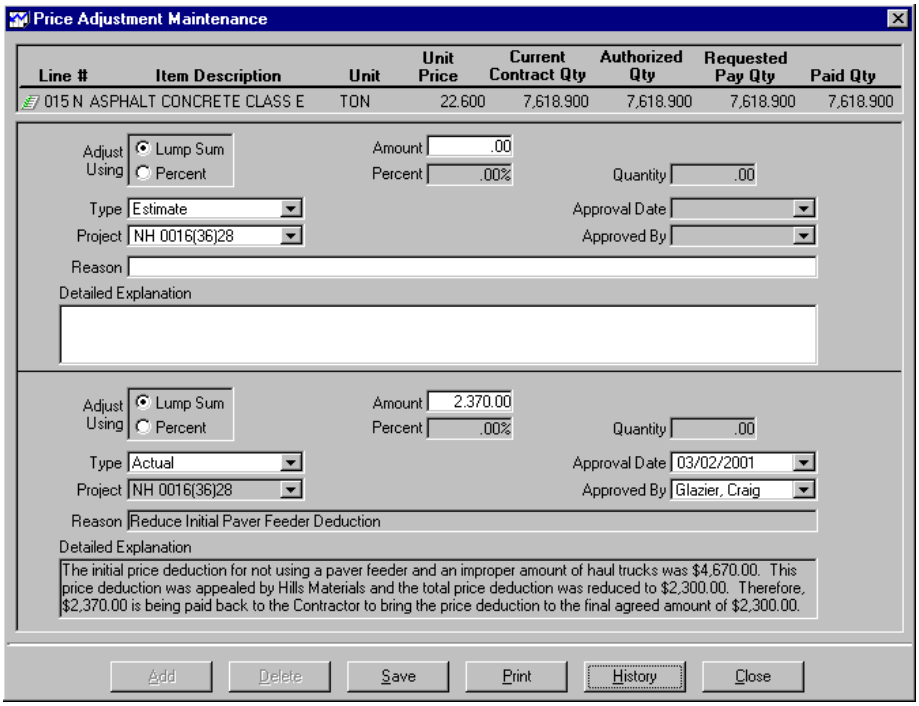
6. Click on the **Price Adjustment Button** .

   The Price Adjustment Maintenance Window appears with any price adjustments already made to the pay item as shown below.



7. Click on the **Add Button** Add .

A new price adjustment appears above the earlier price adjustment(s) as shown below.



8. Select the desired method for making the price adjustment, **Lump Sum** or **Percent**.

9. If the **Lump Sum** radio button was selected, enter the desired price adjustment amount in the **Amount** field.

   OR

   If the **Percent** radio button was selected, enter the desired price adjustment percentage in the **percent** field AND enter the desired quantity to receive the percentage price adjustment in the **Quantity** field.

> Users cannot specify a price adjustment greater than the original contract quantity for the pay item.

10. Select the desired type of price adjustment from the **Type** field's dropdown listing: Estimate, Actual, or Back Out, but not Zeroed Out.

11. If **Actual** was selected for the **Type** field, the **Approval Date** and **Approved By** fields are automatically filled. Edit these fields with their dropdown calendars as necessary.

> If users select **Back Out** for the **Type** field on a price adjustment for an approved pay estimate, an offsetting price adjustment is automatically created in the current open pay estimate with **Back Out** in its **Type** field. At the same time, the original price adjustment's **Type** field is changed to **Zeroed Out**. Refer to Cancel a Price Adjustment if necessary.

12. Select the desired project from the **Project** field's dropdown listing.

13. Enter a descriptive title for the price adjustment in the **Reason** field.

> The description entered here will display on the Pay Estimate Report as well as identify the price adjustment in various CM&P windows.

14. Enter more specific information in the **Detailed Explanation** field.

15. Click on the **Save Button** [Save].

16. Click on the **Add Button** [Add] and repeat steps 8-15 for any additional price adjustments to the pay item as desired.

17. Click on the **Close Button** [Close].

Cancel a Price Adjustment

Price adjustments on an unapproved pay estimate cannot be cancelled by backing out. Instead they must be deleted.

To cancel a price adjustment, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button**.

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Locate the desired pay estimate in the tree panel.

3. Click on the **plus sign** to the left of the desired pay estimate.

   The associated pay estimate items appear in the tree panel below the pay estimate. Items with stockpiles and/or price adjustments display with a plus sign to their left. Specific information about each pay estimate item appears in the list panel to aid in identifying the desired pay estimate item.

4. Locate the desired pay estimate item.

5. Select (highlight) the desired **pay estimate item** in the tree panel.

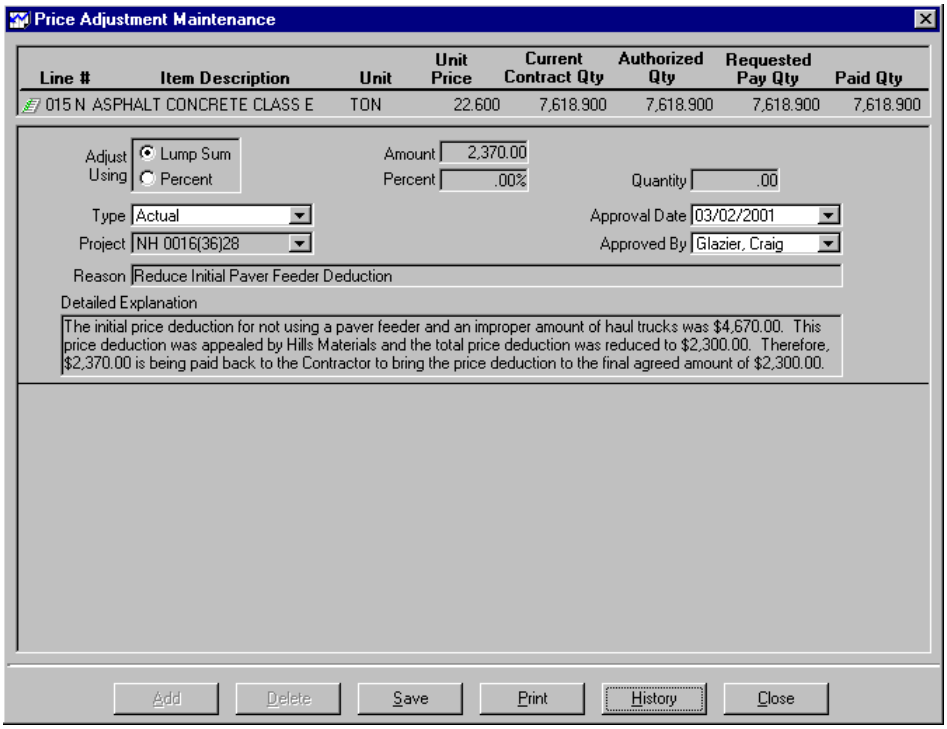
   The list panel displays the price adjustments associated with the selected pay estimate item.

6. Click on the **Price Adjustment Button**.

OR

Double click on the desired **price adjustment**.

The Price Adjustment Maintenance Window appears as shown below.



7. Select **Back Out** from the dropdown listing for the **Type** field.

   An offsetting price adjustment is automatically created in the current open pay estimate with **Back Out** in its **Type** field. At the same time, the original price adjustment's **Type** field is changed to **Zeroed Out**.

8. Click on the **Save Button** Save.

9. Click on the **Close Button** Close.

> The **Zeroed Out** type cannot be chosen by users. This type is automatically generated by the system when users back out an estimated or actual price adjustment on an approved pay estimate.

Delete a Price Adjustment

To delete a price adjustment, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Locate the desired **pay estimate** in the tree panel.

3. Click on the **plus sign** to the left of the desired pay estimate.

   The associated pay estimate items appear in the tree panel below the pay estimate. (Items with stockpiles and/or price adjustments display with a plus sign to their left.) Specific information about each pay estimate item appears in the list panel to aid in identifying the desired pay estimate item.

4. Locate the desired **pay estimate item**.

5. Select (highlight) the desired **pay estimate item** in the tree panel.

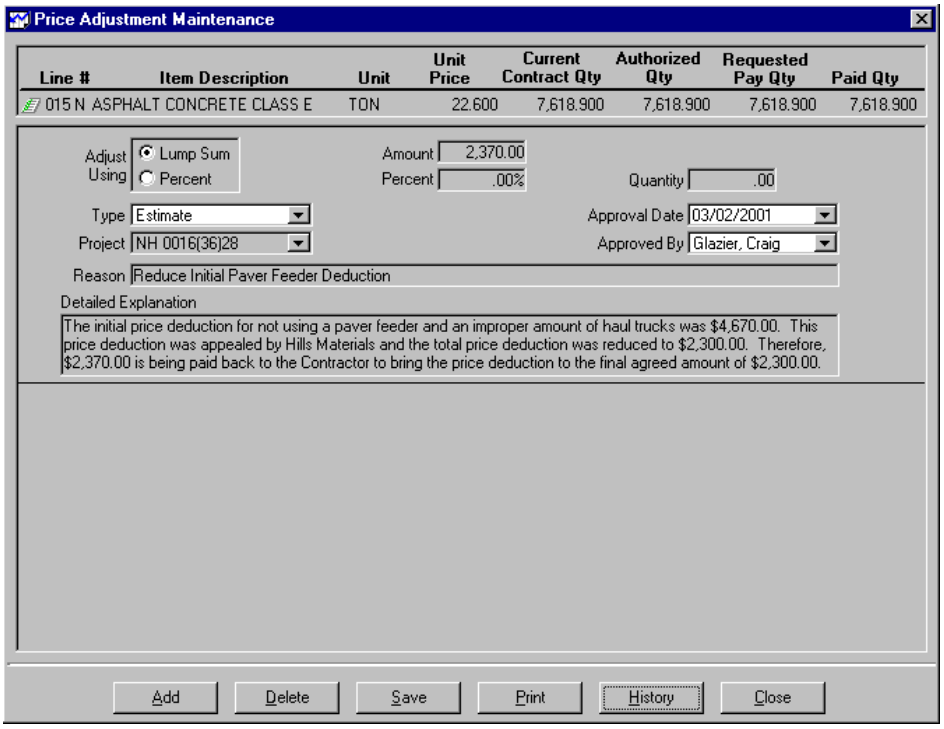
   The list panel displays the price adjustments associated with the selected pay estimate item.

6. Select (highlight) the desired **price adjustment** and click on the **Price Adjustment Button** .

   OR

   Double click on the desired **price adjustment**.

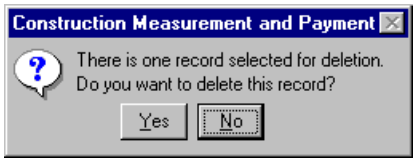
The Price Adjustment Maintenance Window appears as shown below.



7. Verify that this is the price adjustment to delete.

8. Click on the **Delete Button** [Delete] at the bottom of the window.

   CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** [No] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] enters the deletion command into the CM&P System.



9. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

10. Click on the **Save Button** [Save].

    The deletion just made is now recorded.

11. Click on the **Close Button** [Close].

View the Price Adjustment History of a Pay Item

To view the price adjustment history of a pay item, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears.

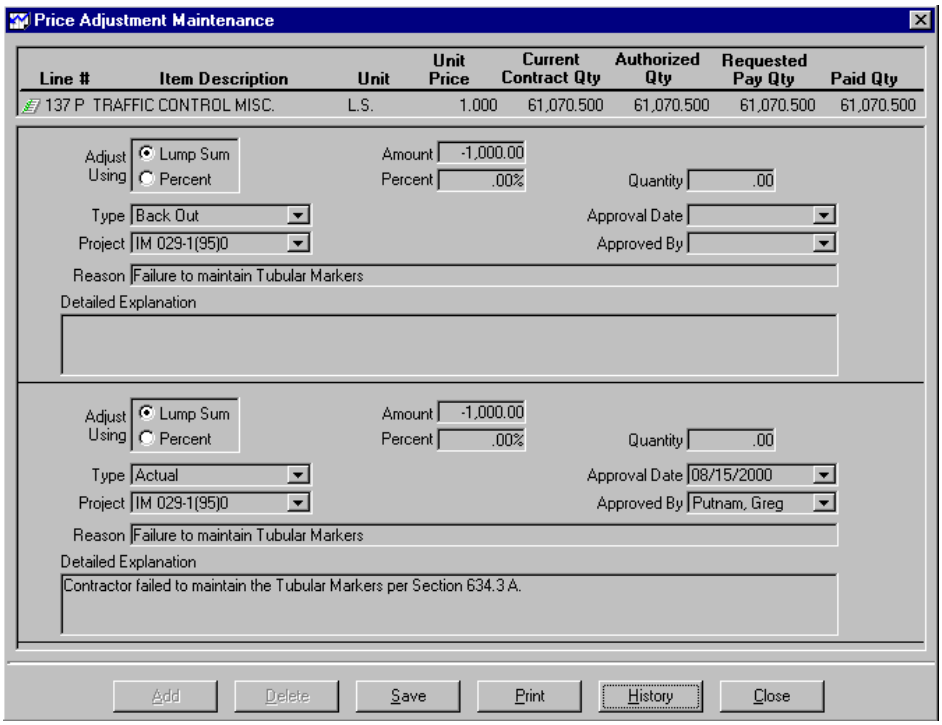
2. Click on the desired **pay estimate** in the left panel.

3. Click on the **Price Adjustment Button** .

   The Select Contract Pay Item Window appears. This window contains all of the pay estimate items in the selected pay estimate.

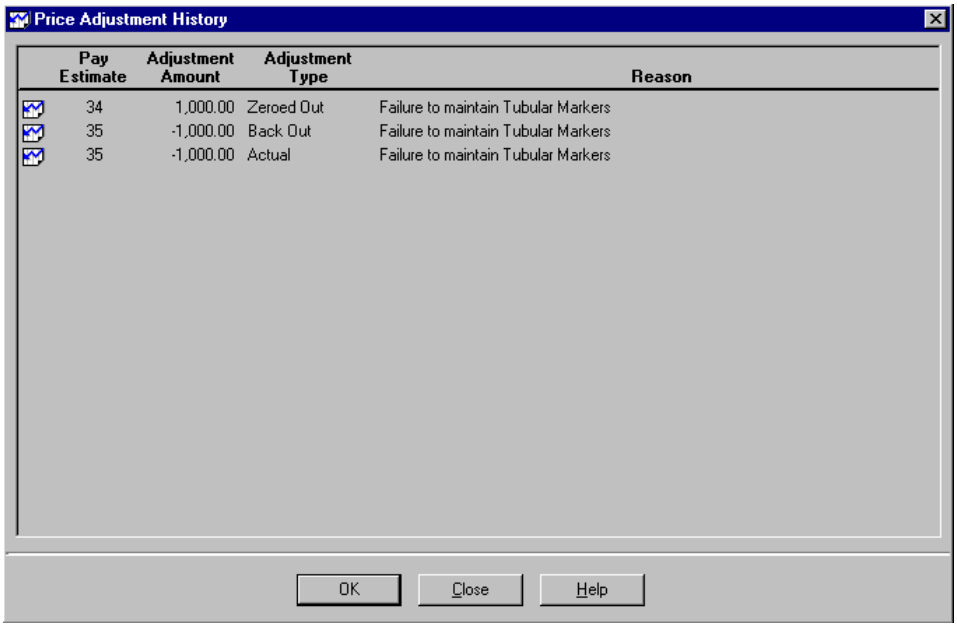
4. Click on the desired **pay item**.

   The Price Adjustment Maintenance Window appears as shown below.



5. Click on the **History Button** History at the bottom of the window.

The Price Adjustment History Window appears as shown below. This window shows all of the price adjustments made to the selected pay item.



6. View the price adjustment history of the pay item.

7. Click on the **Close Button** Close.

View a Price Adjustment

To view a price adjustment, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Locate the desired **pay estimate** in the tree panel.

3. Click on the **plus sign** to the left of the desired pay estimate.

   The associated pay estimate items appear in the tree panel below the pay estimate. (Items with stockpiles and/or price adjustments display with a plus sign to their left.) Specific information about each pay estimate item appears in the list panel to aid in identifying the desired pay estimate item.

4. Locate the desired **pay estimate item**.

5. Select (highlight) the desired **pay estimate item** in the tree panel.

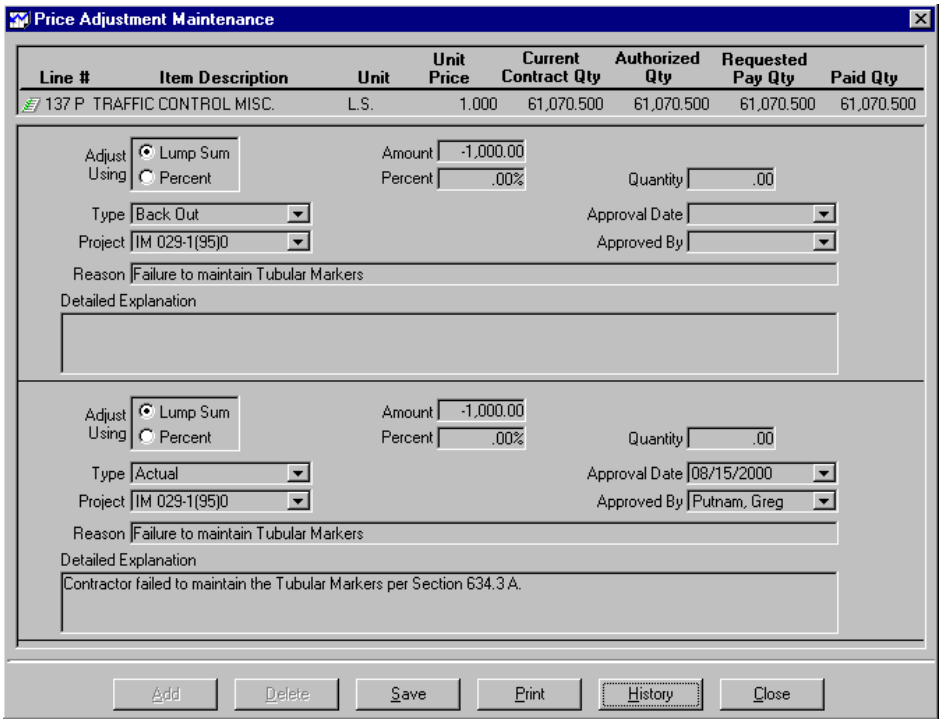
   The list panel displays the price adjustments associated with the selected pay estimate item.

6. Click on the **Price Adjustment Button** .

   OR

   Double click on the desired **price adjustment** in the list panel.

The Price Adjustment Maintenance Window appears as shown below.



7. View the price adjustment(s) displayed as desired.

8. Click on the **Close Button** Close.

Stockpile

Create a Stockpile

To create a stockpile, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

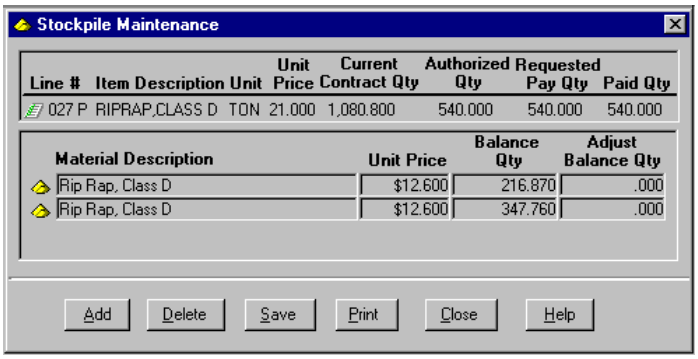
   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Select (highlight) the desired **pay estimate** in the tree panel.

   Any pay estimate items associated with the pay estimate display in the list panel.

3. If the stockpile will be for a pay estimate item already associated with the pay estimate, select (highlight) the desired pay estimate item in the list panel and click on the **Stockpile Button** .

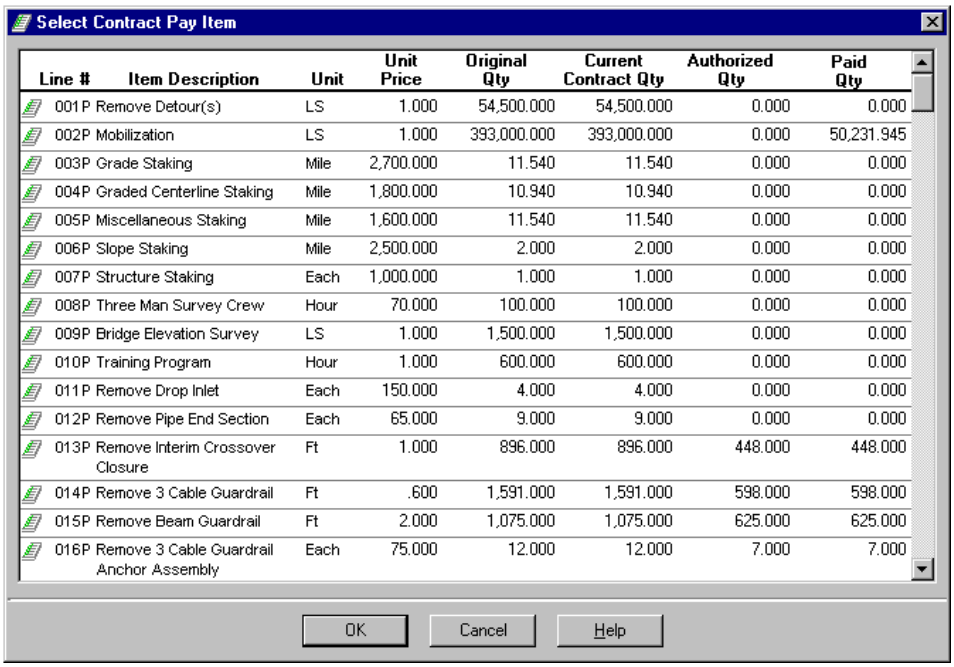
   The Stockpile Maintenance Window appears as shown below.



   Click on the **Add Button** Add and skip to step 8.

4. If no pay estimate item has been associated with the pay estimate for the stockpiled item, click on the **Stockpile Button** while only the desired **pay estimate** is selected (highlighted).

The Select Contract Pay Item Window appears as shown below. This window displays all of the pay items associated with the selected contract.



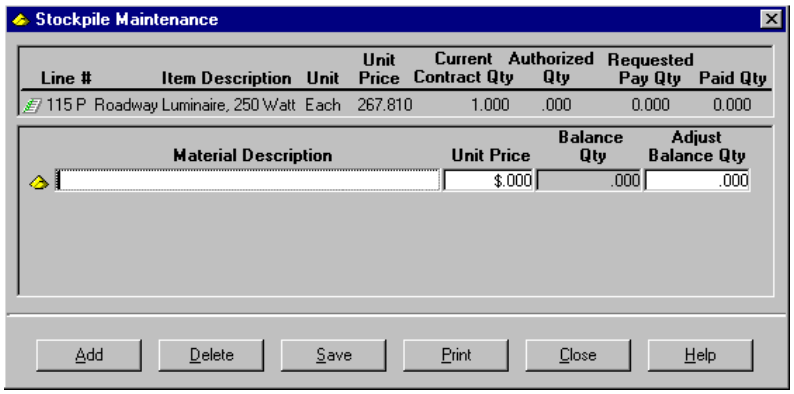
Line #	Item Description	Unit	Unit Price	Original Qty	Current Contract Qty	Authorized Qty	Paid Qty
001P	Remove Detour(s)	LS	1.000	54,500.000	54,500.000	0.000	0.000
002P	Mobilization	LS	1.000	393,000.000	393,000.000	0.000	50,231.945
003P	Grade Staking	Mile	2,700.000	11.540	11.540	0.000	0.000
004P	Graded Centerline Staking	Mile	1,800.000	10.940	10.940	0.000	0.000
005P	Miscellaneous Staking	Mile	1,600.000	11.540	11.540	0.000	0.000
006P	Slope Staking	Mile	2,500.000	2.000	2.000	0.000	0.000
007P	Structure Staking	Each	1,000.000	1.000	1.000	0.000	0.000
008P	Three Man Survey Crew	Hour	70.000	100.000	100.000	0.000	0.000
009P	Bridge Elevation Survey	LS	1.000	1,500.000	1,500.000	0.000	0.000
010P	Training Program	Hour	1.000	600.000	600.000	0.000	0.000
011P	Remove Drop Inlet	Each	150.000	4.000	4.000	0.000	0.000
012P	Remove Pipe End Section	Each	65.000	9.000	9.000	0.000	0.000
013P	Remove Interim Crossover Closure	Ft	1.000	896.000	896.000	448.000	448.000
014P	Remove 3 Cable Guardrail	Ft	.600	1,591.000	1,591.000	598.000	598.000
015P	Remove Beam Guardrail	Ft	2.000	1,075.000	1,075.000	625.000	625.000
016P	Remove 3 Cable Guardrail Anchor Assembly	Each	75.000	12.000	12.000	7.000	7.000

5. Locate the desired **pay item**, using the scrollbar if necessary.

6. Select (highlight) the desired **pay item**.

7. Click on the **OK Button** OK at the bottom of the window.

   The Stockpile Maintenance Window appears as shown below.



Line #	Item Description	Unit	Unit Price	Current Contract Qty	Authorized Qty	Requested Pay Qty	Paid Qty
115 P	Roadway Luminaire, 250 Watt	Each	267.810	1.000	.000	0.000	0.000

Material Description	Unit Price	Balance Qty	Adjust Balance Qty
	$.000	.000	.000

8. Enter a specific description of the stockpiled material in the **Material Description** field so that each particular stockpile can be identified.

9. Enter the unit price of the stockpiled material in the **Unit Price** field.

The sum of the unit prices in the **Unit Price** column cannot exceed the unit price shown in the upper panel.

10. Enter the number of units of the item to be added to the stockpile in the **Adjust Balance Quantity** field.

    Users can not enter a value into the **Adjust Balance Quantity** field which would cause the amount in the **Balance Quantity** field to be greater than the current contract quantity for the contract pay item.

11. Click on the **Save Button** [Save].

    The **Balance Quantity** field displays the balance quantity of the stockpiled material and the **Adjust Balance Quantity** field again becomes available for entry.

    To correct a mistaken entry, in the **Adjust Balance Quantity** field EITHER enter the amount necessary to increase the **Balance Quantity** to the desired amount OR enter the negative amount necessary to decrease the **Balance Quantity** to the desired amount. (The **Save Button** must be clicked on before the changes will occur.)

12. Click on the **Add Button** [Add] and repeat steps 8-11 to add any new stockpiles for the pay item as desired.

13. Click on the **Close Button** [Close].

Edit a Stockpile

To edit a stockpile, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Click on the **plus sign** to the left of the desired pay estimate.

   The associated pay estimate items appear in the tree panel below the pay estimate. (Items with stockpiles and/or price adjustments display with a plus sign to their left.) Specific information about each pay estimate item appears in the list panel to aid in identifying the desired pay estimate item.

3. Locate the desired **pay estimate item**.

4. Select (highlight) the desired **pay estimate item** in the tree panel.

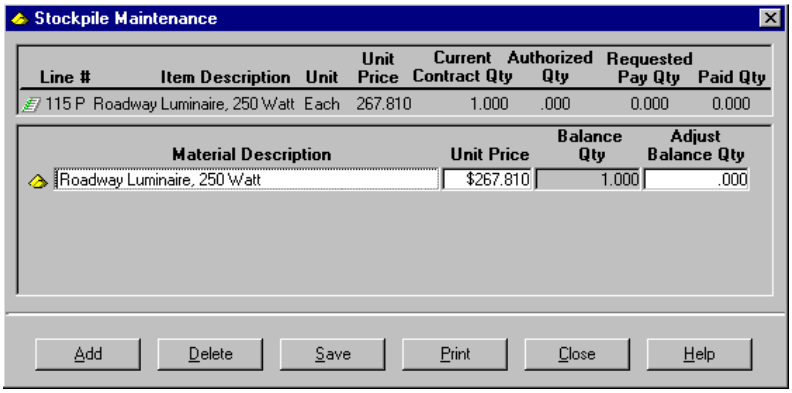
   The list panel displays the stockpile(s) associated with the selected pay estimate item.

5. Click on the **Stockpile Button** .

   OR

   Double click on the desired **stockpile** in the list panel.

   The Stockpile Maintenance Window appears as shown below. This window contains the information that was recorded about the stockpile(s) for the pay item selected.



6. Edit the information as desired, keeping in mind the following notes.

   The sum of the unit prices in the **Unit Price** column cannot exceed the unit price shown in the upper panel.

Users can not enter a value into the **Adjust Balance Quantity** field which would cause the amount in the **Balance Quantity** field to be greater than the current contract quantity for the contract pay item.

7. Click on the **Save Button** Save.

   The **Balance Quantity** field displays the balance quantity of the stockpiled material and the **Adjust Balance Quantity** field again becomes available for entry.

   To correct a mistaken entry, in the **Adjust Balance Quantity** field EITHER enter the amount necessary to increase the **Balance Quantity** to the desired amount OR enter the negative amount necessary to decrease the **Balance Quantity** to the desired amount. (The **Save Button** must be clicked on before the changes will occur.)

8. Click on the **Add Button** Add to add any new stockpiles for the pay item. Refer to steps 8-11 of Create a Stockpile if necessary.

9. Click on the **Close Button** Close.

   Stockpiles within approved pay estimates cannot be edited or deleted.

Delete a Stockpile

WARNING: CM&P displays no Deletion Confirmation Window when deleting stockpiles.

To delete a stockpile, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Pay Estimate Button** .

   The Pay Estimate Window appears below the Pay Estimate Toolbar.

2. Click on the **plus sign** to the left of the desired pay estimate.

   The associated pay estimate items appear in the tree panel below the pay estimate. (Items with stockpiles and/or price adjustments display with a plus sign to their left.) Specific information about each pay estimate item appears in the list panel to aid in identifying the desired pay estimate item.

3. Locate the desired **pay estimate item**.

4. Select (highlight) the desired **pay estimate item** in the tree panel.

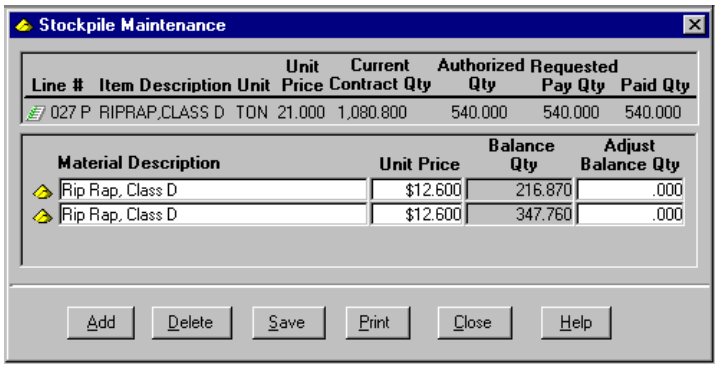
   The list panel displays the stockpile(s) associated with the selected pay estimate item.

5. Click on the **Stockpile Button** .

   OR

   Double click on the desired **stockpile** in the list panel.

   The Stockpile Maintenance Window appears as shown below. This window contains the information that was recorded about the stockpile(s) for the pay item selected.



6. Click on the specific stockpile to be deleted.

7. Verify that this is the stockpile to delete.

8. Click on the **Delete Button** Delete at the bottom of the window.

At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Delete Button** [Delete] to save the information as deleted.

9. Click on the **Save Button** [Save].

   The deletion just made is now recorded.

10. Click on the **Close Button** [Close].

Stockpiles within approved pay estimates cannot be edited or deleted.

11. Contract Change Orders

The Contract Change Order Window is reached through the **Contract Change Order Button** on the Frame bar Toolbar or through the menu path: **Goto, Contract Change Order**. Within this window, users can create change orders within the CM&P System. Using buttons on the Contract Change Order Toolbar shown below, users can create, edit, or delete contract change orders as well as their associated change items, change reasons, and change instructions. They can also assign or add price adjustments to contract change orders.

The **Print Button** allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **Change Order Button** allows users to enter information about a correction to a contract. A Change Order in some way alters the cost or schedule involved in a contract. This button opens the Change Order Maintenance Window, in which users can create, edit, and delete a change order.

The **Change Reason Button** opens the Change Reason Window, in which users can create, edit, and delete change reason(s).

The **Change Instruction Button** allows users to enter the details about how a contract change order is to be completed.

The **Change Item Button** accesses the Change Item Maintenance Window, from which users can create, edit, and delete a change item.

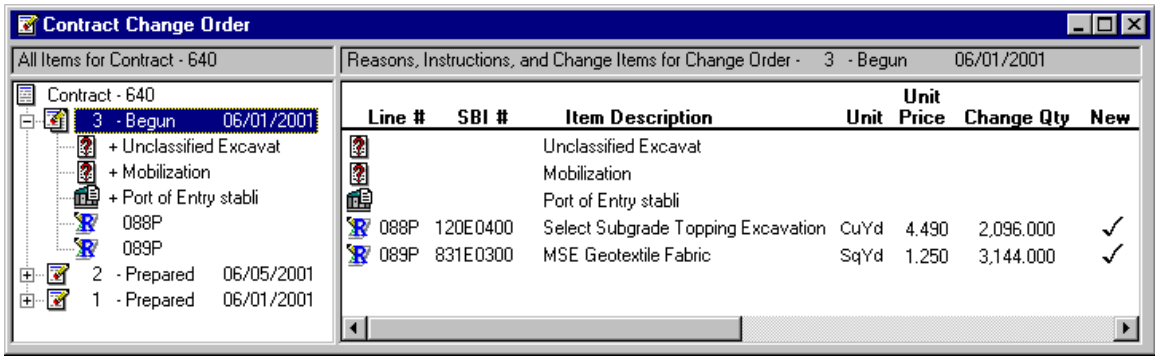
The **Assign Price Adjustment Button** opens the Assign Price Adjustments to CCO's Window, allowing users to move pay estimates' actual price adjustments into association with the Contract Change Order.

The **Help Button** allows users to retrieve help from the application's online help file. If the specific information required is not supplied immediately, try searching the Help Topics panel to the left of the main Help panel.

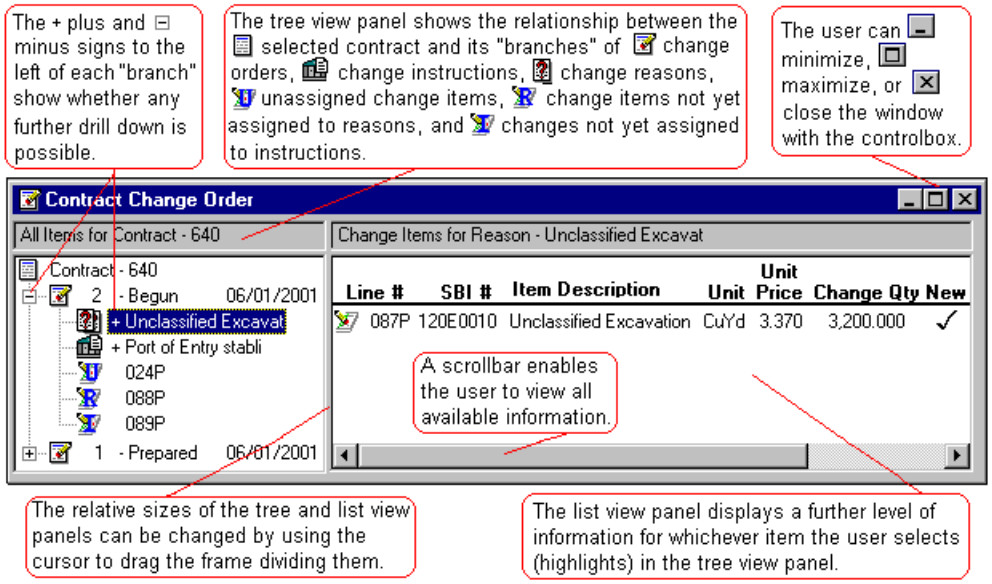
The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.

Contract Change Order Window

When first opened, the Contract Change Order Window displays reasons, instructions, and change items (along with their descriptive information) for the most recent contract change order as in the example below.



The Contract Change Order Window also allows users to view individual change item information as shown in the drilled down and annotated example below.



Contract Change Orders

Create a Contract Change Order

> Unlike pay estimates, when a contract change order is approved, no additional change order is created by CM&P. Users must create new contract change orders as they are needed.

To create a change order, perform the following steps.

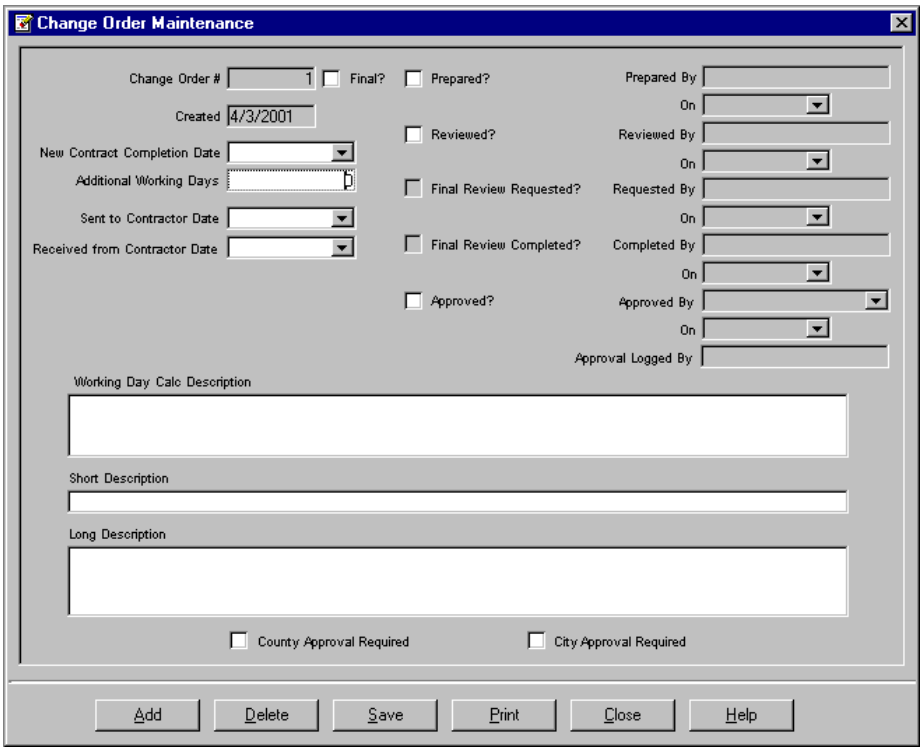
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the **contract** in the tree panel.

3. Click on the **Change Order Button** on the Contract Change Order Toolbar.

   The Change Order Maintenance Window appears as shown below.



4. Select the **Final?** checkbox if this is the last change order and it can be finalized.

5. Select the desired date from the **New Contract Completion Date** field's drop-down list if appropriate.

6. Enter the desired number in the **Additional Working Days** field if days have been added to the contract.

7. Enter a description of how the additional working days were calculated or a statement that no days were added in the **Working Day Calculation Description** field.

8. Enter a title for the new change order in the **Short Description** field.

> The short description entered here will identify the change order in the Management Notification Window.

9. Enter a longer explanation of the new change order in the **Long Description** field.

10. Click on the **County Approval Required** checkbox if the new change order requires county approval.

11. Click on the **City Approval Required** checkbox if the new change order requires city approval.

12. Click on the **Save Button** [Save] at the bottom of the window.

13. Click on the **Close Button** [Close] at the bottom of the window.

Edit a Contract Change Order

To edit a change order, perform the following steps.

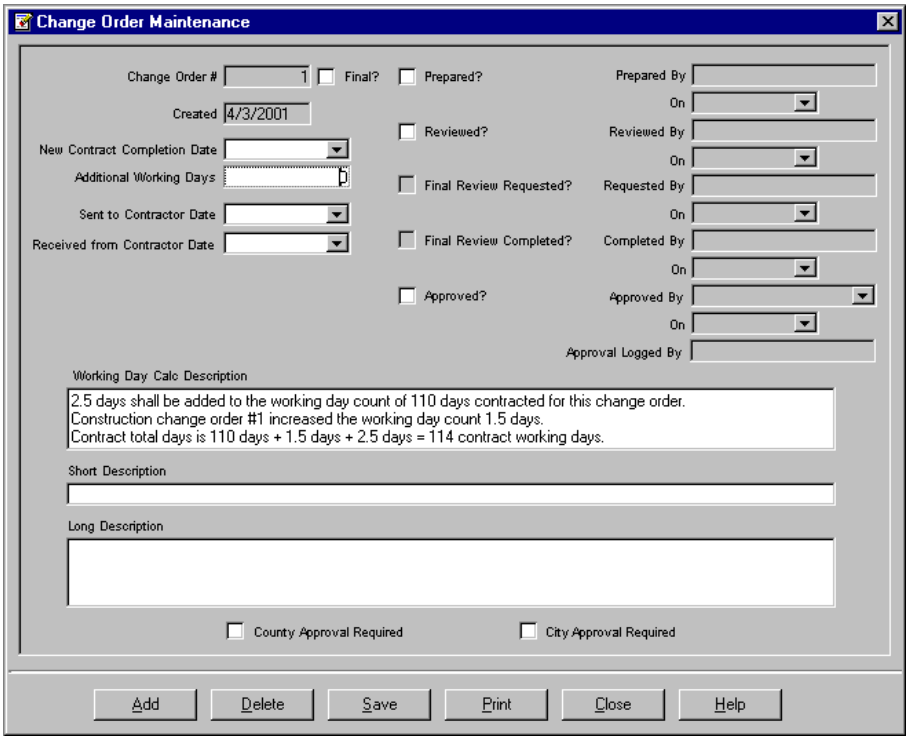
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the **Change Order Button** on the Contract Change Order Toolbar.

   The Change Order Maintenance Window appears as shown below.



4. Edit the information in the window as desired. Users may also mark CCO's as requiring city or county approval, prepared, reviewed, approved, final review requested, final review completed, final CCO received, or they may enter sent to and/or received from contractor dates.

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

Create a Final Contract Change Order

To create a final contract change order, perform the following steps.

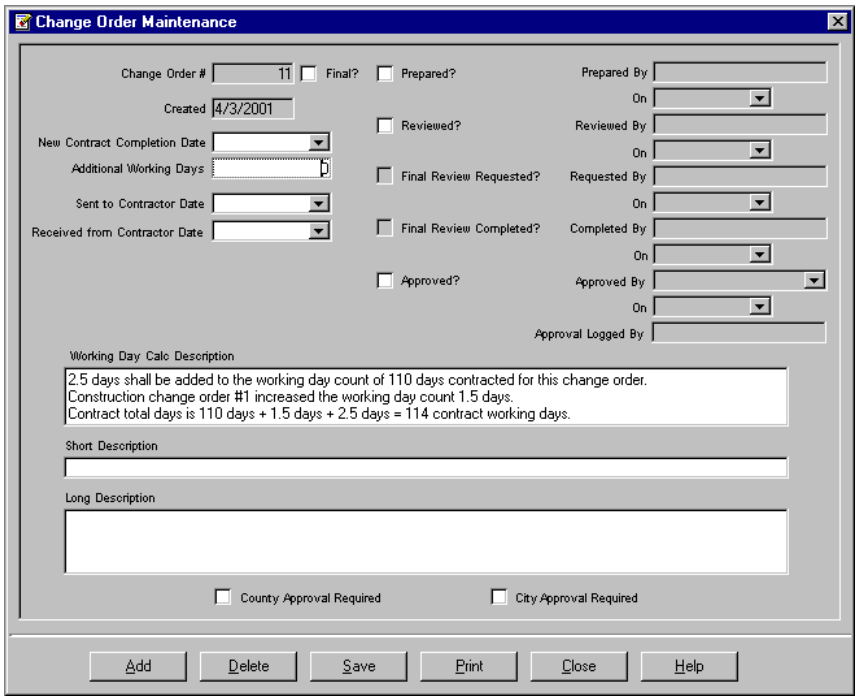
1. From the CM&P Frame Toolbar, click on the **Change Order Button** .

   The CCO Window and toolbar appear.

2. Click on the desired **CCO** in the tree panel on the left.

3. Click on the **Change Order Button** .

   The Change Order Maintenance Window appears as shown below.



4. Click on the **Final?** checkbox to create a checkmark in the checkbox.

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

   CM&P returns to the CCO Window. An **F** now appears next to the number of the final CCO in the tree panel.

Create a Supplemental Contract Change Order

To create a supplemental contract change order, perform the following steps.

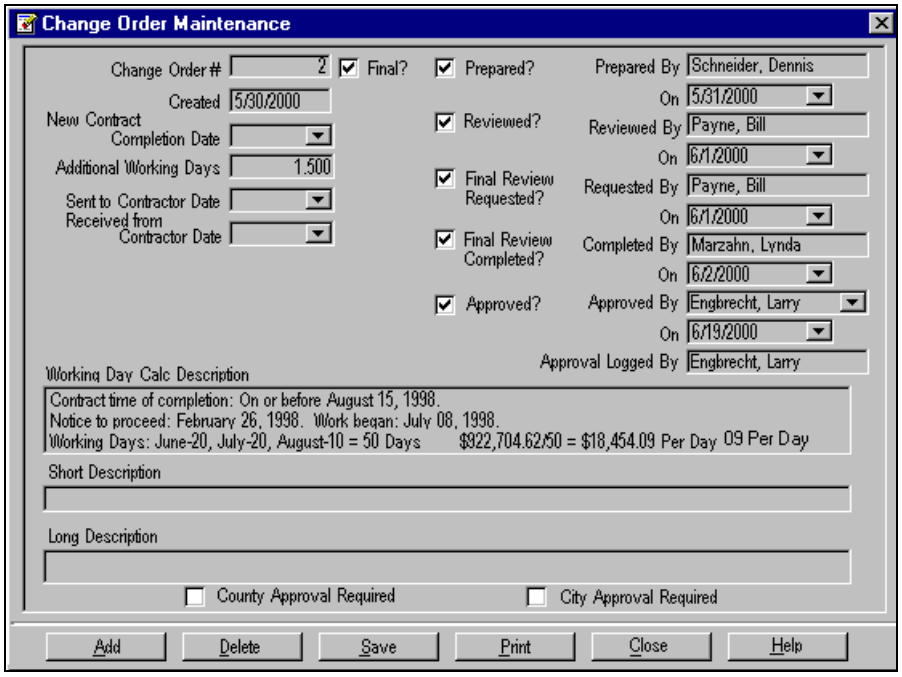
1. From the CM&P Frame Toolbar, click on the **Change Order Button** .

   The CCO Window and toolbar appear.

2. Click on the **final CCO** or **most recent supplemental CCO** (in the right panel).

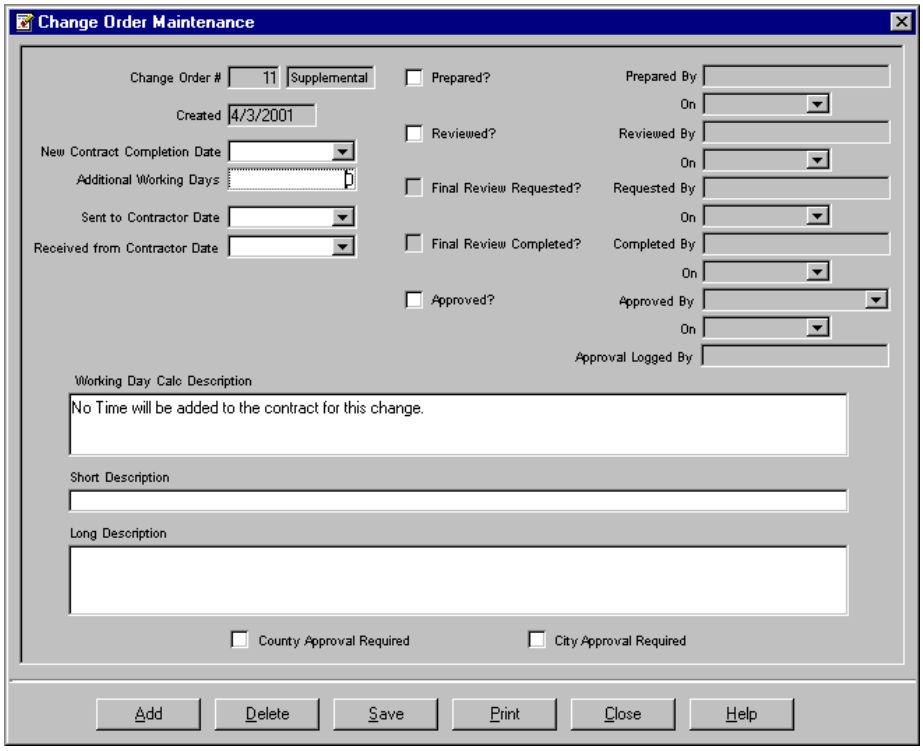
3. Click on the **Change Order Button** .

   The Change Order Maintenance Window appears with the information recorded for the selected CCO.



4. Click on the **Add Button** Add at the bottom of the window.

The Change Order Maintenance Window appears as shown below, already marked as a Supplemental CCO.



5. Complete the desired information.

6. Click on the **Save Button** Save at the bottom of the window.

7. Click on the **Close Button** Close at the bottom of the window.

   CM&P returns to the CCO Window. An **S** now appears next to the number of the supplemental CCO in the tree panel.

Delete a Contract Change Order

> Only the most recently created CCO can be deleted. Users must delete all change items, change reasons, and change instructions from a CCO before deleting the CCO.

To delete a contract change order, perform the following steps.

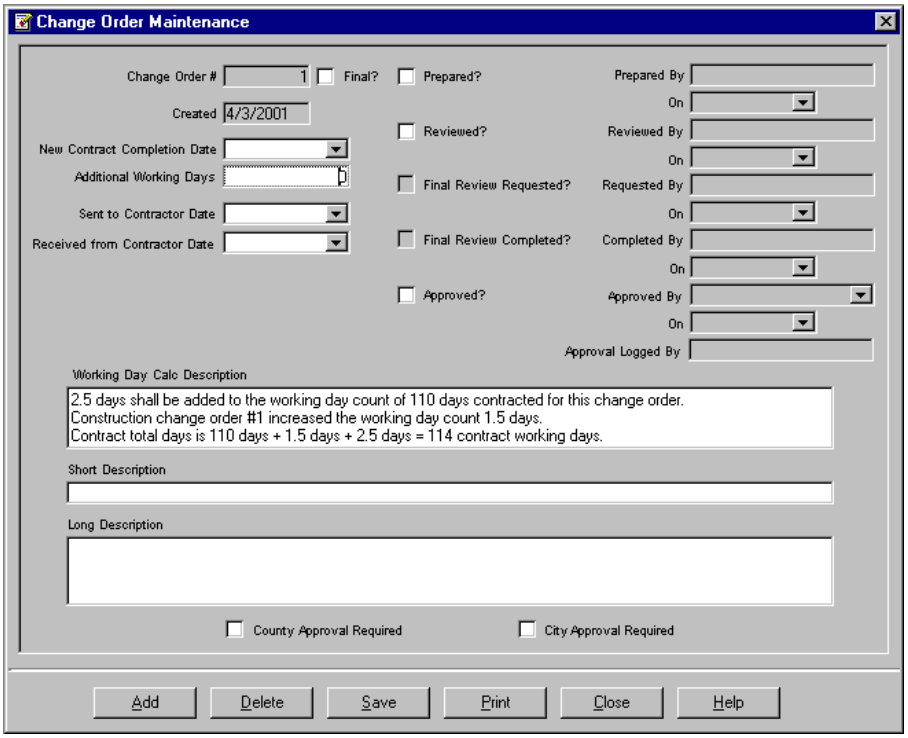
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the **Change Order Button** on the Contract Change Order Toolbar.

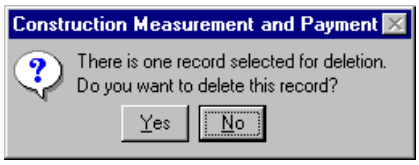
   The Change Order Maintenance Window appears as shown below.



4. Verify that this is the desired CCO to delete.

5. Click on the **Delete Button** Delete at the bottom of the window.

CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** [No] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] enters the deletion command into the CM&P System.



6. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

7. Click on the **Save Button** [Save] at the bottom of the window.

   The deletion just made is now recorded.

8. Click on the **Close Button** [Close] at the bottom of the window.

Mark a Contract Change Order as Final CCO Received

To mark a contract change order as having had the final CCO received, perform the following steps.

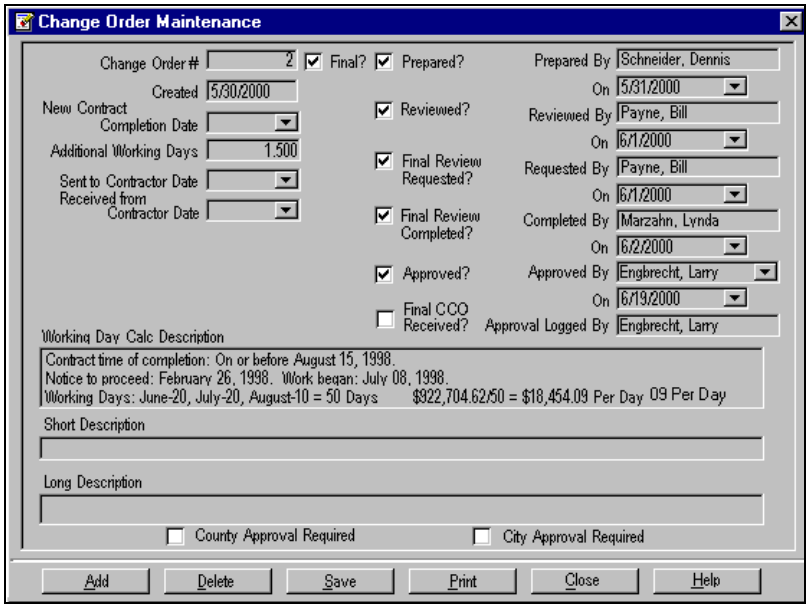
1. From the CM&P Frame Toolbar, click on the **Change Order Button** .

   The CCO Window and toolbar appear.

2. Click on the appropriate **CCO** in the tree panel on the left.

3. Click on the **Change Order Button** .

   The Change Order Maintenance Window appears as shown below.



4. Click on the **Final CCO Received?** checkbox.

   A checkmark appears in the box.

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

Mark a Contract Change Order as Requiring City or County Approval

To mark a contract change order as requiring city or county approval, perform the following steps.

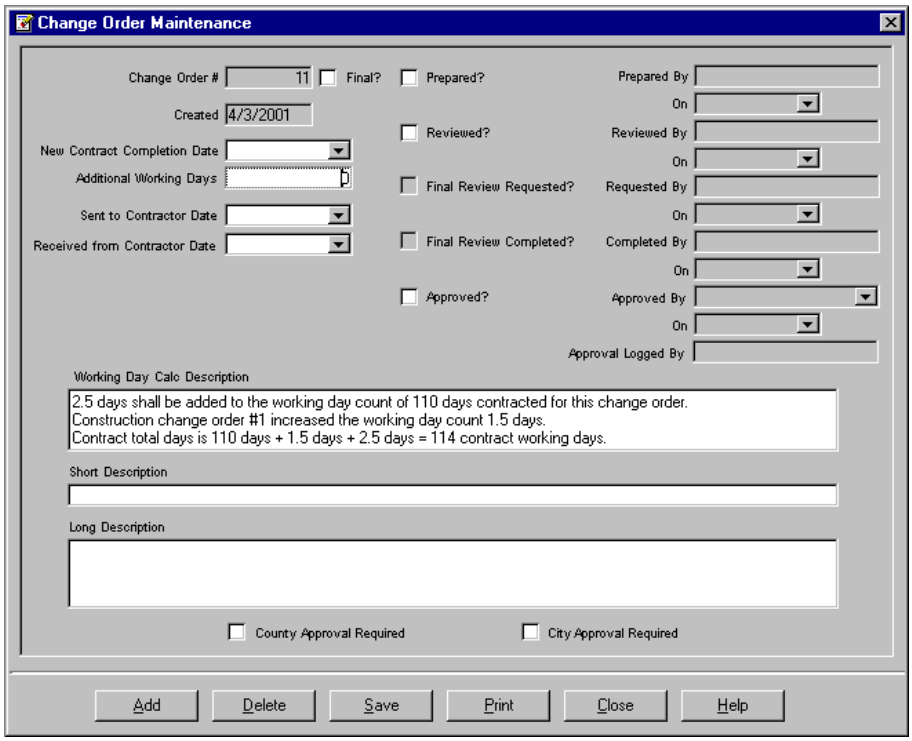
1. From the CM&P Frame Toolbar, click on the **Change Order Button** .

   The CCO Window and toolbar appear.

2. Click on the appropriate **CCO** in the tree panel on the left.

3. Click on the **Change Order Button** .

   The Change Order Maintenance Window appears as shown below.



4. Click on the **County Approval Required** checkbox and/or the **City Approval Required checkbox**.

   A checkmark appears in the box(es).

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

Enter Contractor Dates for a Contract Change Order

To enter sent to or received from contractor dates for a contract change order, perform the following steps.

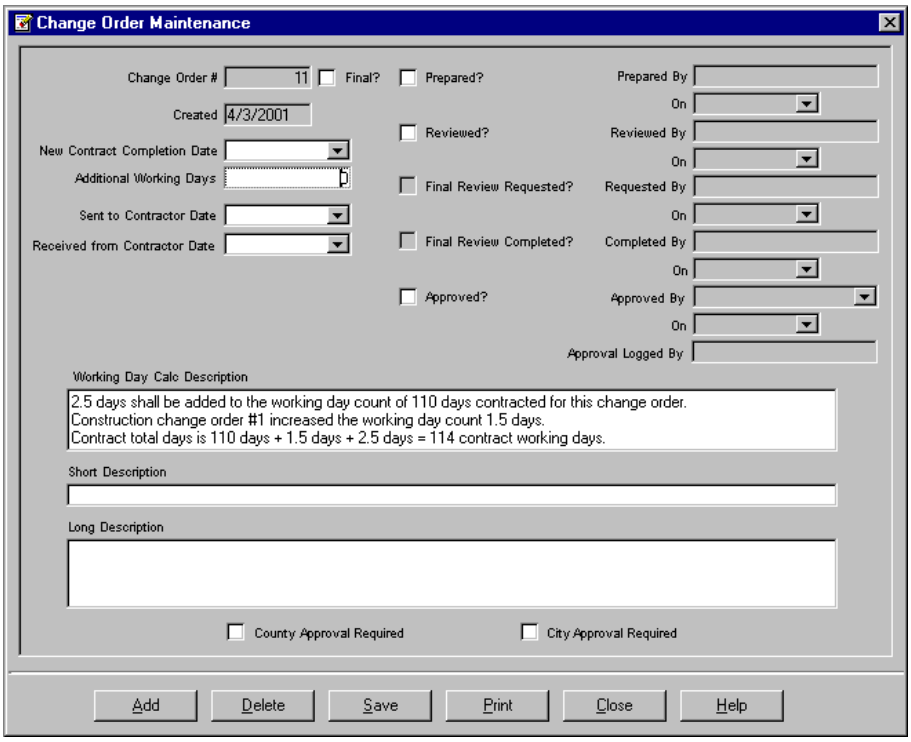
1. From the CM&P Frame Toolbar, click on the **Change Order Button** .

   The CCO Window and toolbar appear.

2. Click on the appropriate **CCO** in the tree panel on the left.

3. Click on the **Change Order Button** .

   The Change Order Maintenance Window appears as shown below.



4. Enter or select the appropriate date(s) from the dropdown calendar(s) in the **Sent to Contractor Date** and/or the **Received from Contractor Date** field(s).

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

Mark a Contract Change Order as Prepared

To mark a contract change order as prepared, perform the following steps.

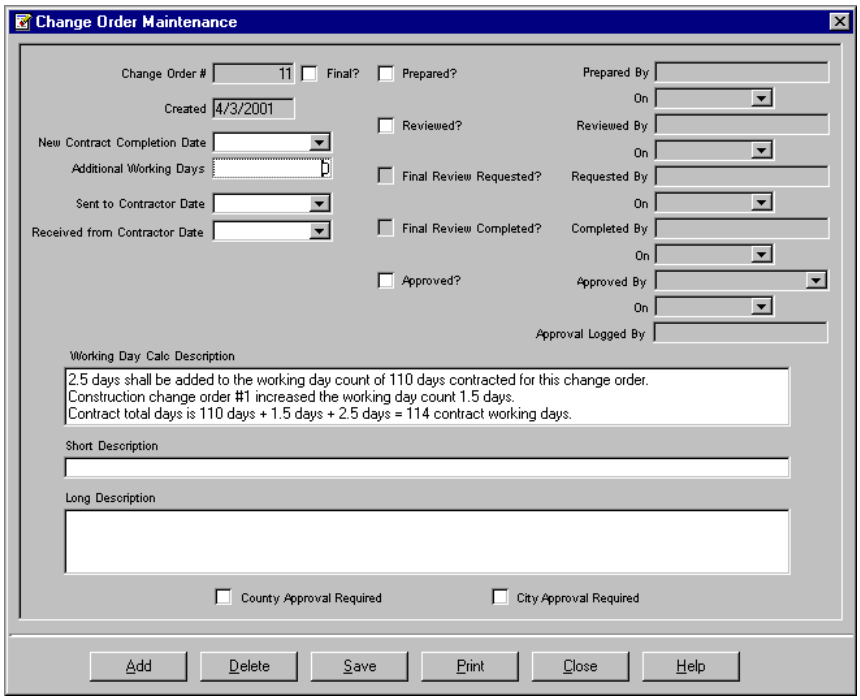
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the **Change Order Button** on the Contract Change Order Toolbar.

   The Change Order Maintenance Window appears as shown below.



4. Click on the **Prepared?** checkbox.

   A checkmark appears in the box. Information is also automatically entered in the **Prepared By** and **On** fields to the right of the checked box. Users can edit the information in the **On** field (by clicking on the downward-pointing arrow next to the field and selecting the proper information from the resulting dropdown calendar). However, the information in the **Prepared By** field cannot be changed.

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

Approve a Contract Change Order

> CCO's cannot be approved through the Mobile CM&P Application. Users must be logged onto the Desktop Application to perform this function.

To approve a contract change order, perform the following steps.

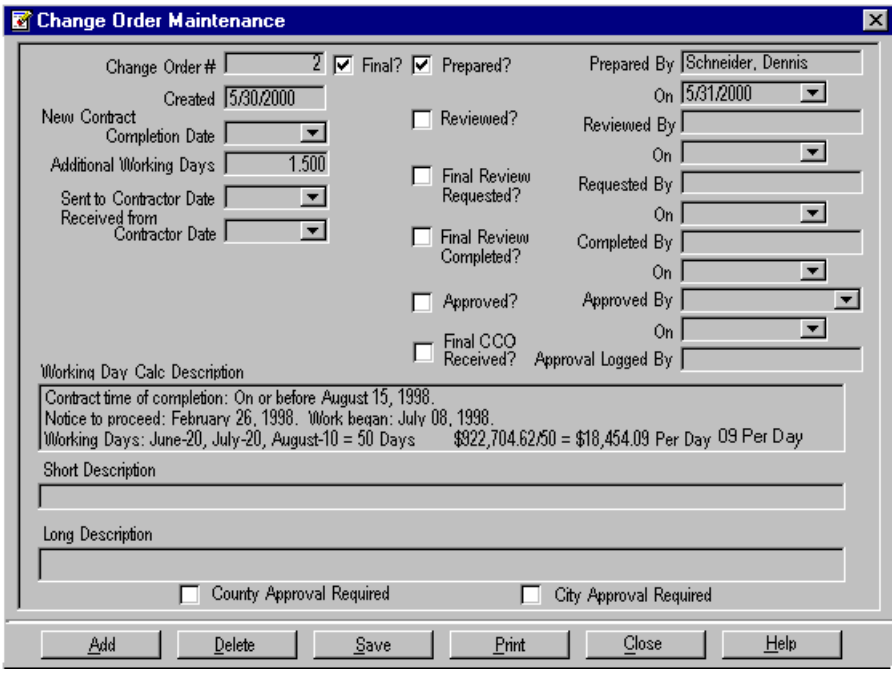
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the **Change Order Button** on the Contract Change Order Toolbar.

   The Change Order Maintenance Window appears as shown below.



> Users cannot mark a CCO as approved until it has been marked prepared. Also, users cannot approve a CCO if another, lower-numbered CCO has not yet been approved.

4. Click on the **Approved?** checkbox.

A checkmark appears in the checkbox.

Information is also automatically entered in the **Approved By**, **On**, and **Approval Logged By** fields to the right of the checked box. Users can edit the information in the **Approved By** and **On** fields (by clicking on the downward-pointing arrow next to the field and selecting the proper information from the resulting dropdown list and calendar, respectively). However, the information in the **Approval Logged By** field cannot be changed.

5. Click on the **Save Button** [Save] at the bottom of the window.

6. Click on the **Close Button** [Close] at the bottom of the window.

Price Adjustments

Assign a Price Adjustment to a Contract Change Order

To final a contract, all **Actual** price adjustments (created in the Pay Estimate section of CM&P) must be assigned to a contract change order.

To assign a price adjustment to a contract change order, perform the following steps.

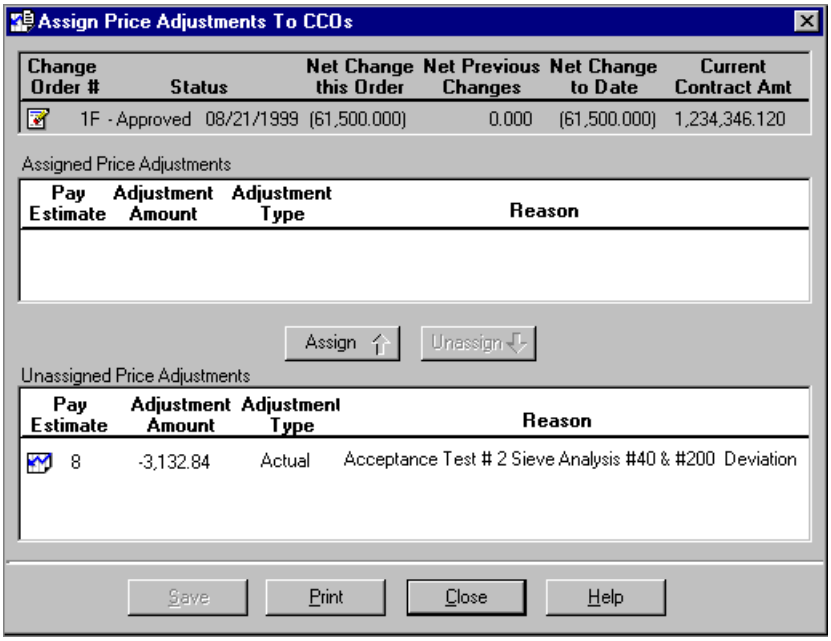
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the **Assign Price Adjustment Button** on the Contract Change Order Toolbar.

   The Assign Price Adjustments to CCO's Window appears as shown below.



4. Select (highlight) the desired price adjustment in the **Unassigned Price Adjustments** panel and click on the **Assign Button** Assign .

   The price adjustment moves to the **Assigned Price Adjustments** panel.

   OR

   Double click on the desired price adjustment in the **Unassigned Price Adjustments** panel.

The price adjustment moves to the **Assigned Price Adjustments** panel.

To correct a mistakenly assigned price adjustment, highlight the price adjustment in the **Assigned Price Adjustments** panel and click on the **Unassign Button** OR double click on the price adjustment. CM&P moves the price adjustment back to the **Unassigned Price Adjustments** panel.

5. Click on the **Save Button** [Save] at the bottom of the window.

6. Click on the **Close Button** [Close] at the bottom of the window.

Price adjustments assigned to a CCO display on the DOT 220B Report.

Unassign a Price Adjustment from a Contract Change Order

To final a contract, all **Actual** price adjustments (created in the Pay Estimate section of CM&P) must be assigned to a CCO.

To unassign a price adjustment from a contract change order, perform the following steps.

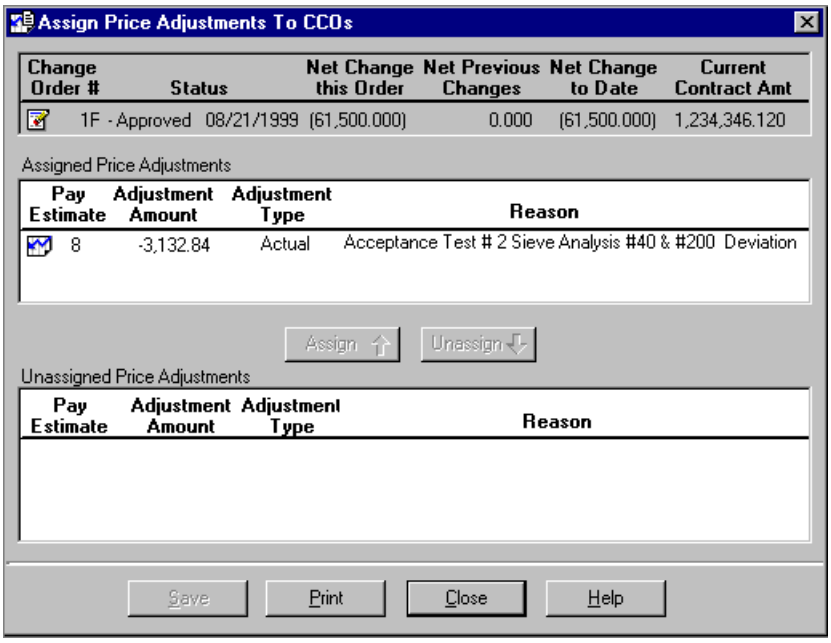
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the **Assign Price Adjustment Button** on the Contract Change Order Toolbar.

   The Assign Price Adjustments to CCO's Window appears as shown below.



4. Select (highlight) the desired price adjustment in the **Assigned Price Adjustments** panel and click on the **Unassign Button** Unassign.

   The price adjustment moves to the **Unassigned Price Adjustments** panel.

   OR

   Double click on the desired price adjustment in the **Assigned Price Adjustments** panel.

   The price adjustment moves to the **Unassigned Price Adjustments** panel.

To correct a mistakenly unassigned price adjustment, highlight the price adjustment in the **Unassigned Price Adjustments** panel and click on the **Assign Button** OR double click on the price adjustment. CM&P moves the price adjustment back to the **Assigned Price Adjustments** panel.

5. Click on the **Save Button** [Save] at the bottom of the window.

6. Click on the **Close Button** [Close] at the bottom of the window.

Price adjustments assigned to a CCO display on the DOT 220B Report.

Contract Change Item

Create a Contract Change Item

To create a new change item, perform the following steps.

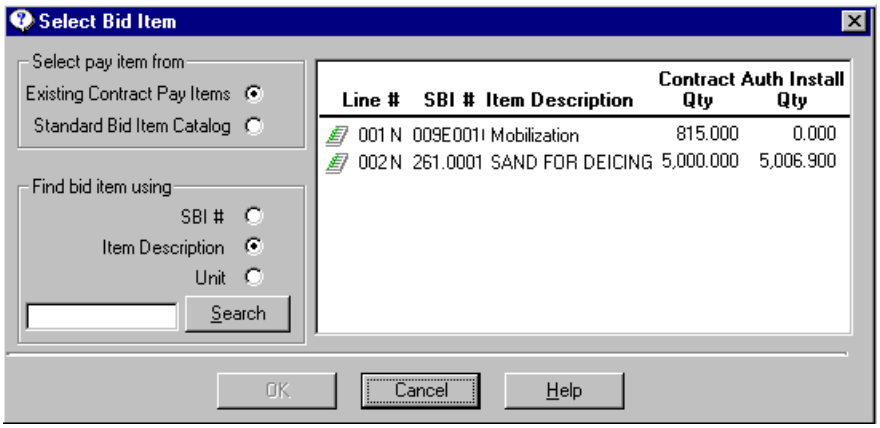
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Locate the desired change order in the tree panel.

3. Select (highlight) the desired change order and click on the **Change Item Button**. .

   The Select Bid Item Window appears as shown below.

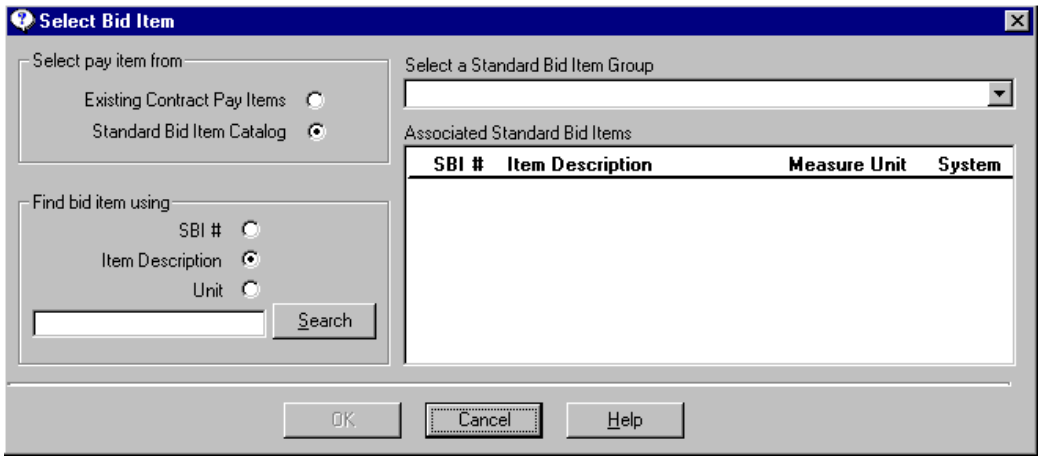


4. In the **Select pay item from** panel, mark the desired radio button. Use the **Existing Contract Pay Items** radio button for a current contract item that must be changed. (Proceed to step 5.)

   OR

   Use the **Standard Bid Item Catalog** radio button for an item that must be added to the contract.

If the **Standard Bid Item Catalog** radio button was selected, the **Select a Standard Bid Item Group** field appears above the list panel on the right side of the window as in the example shown below.



Then use the **Select a Standard Bid Item Group** field's dropdown list to select (highlight) the desired group of bid items from which to select a bid item.

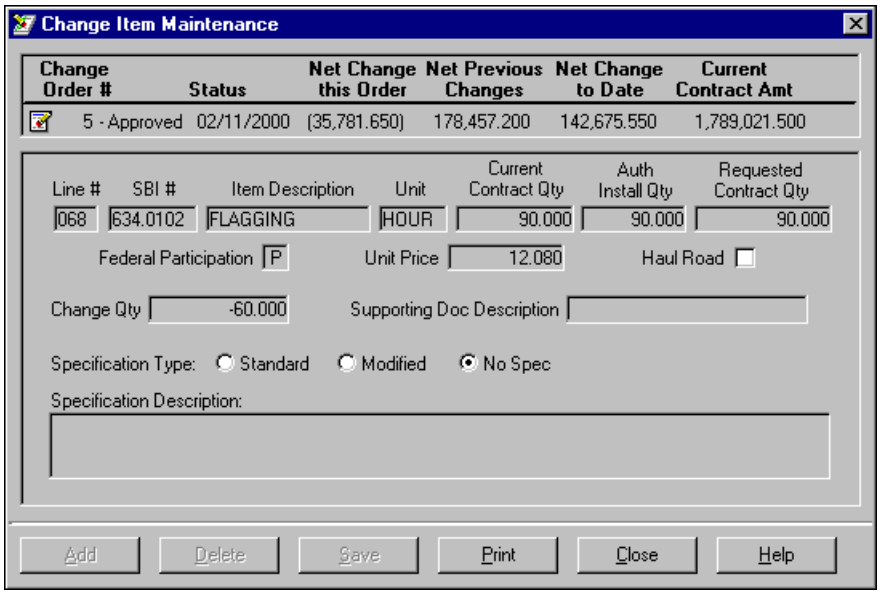
5. Locate the item to be added, using the **Find bid item using** panel's search function if necessary.

6. Select (highlight) the desired item and click on the **OK Button** OK.

   OR

   Double click on the desired item.

   The Change Item Maintenance Window appears as shown below.



7. If the item is being added to the contract, select **N** or **P** for the **Federal Participation** field and enter the desired amount in the **Unit Price** field.

8. If desired, click on the **Haul Road** checkbox to indicate that the change item involves a haul road.

9. Enter the desired amount in the **Change Quantity** field.

10. Enter the desired information in the **Supporting Documentation Description** field.

11. Select the appropriate Specification Type: **No Spec** if no testing or spec requirements exist for the item, **Standard** if the specifications to be used are listed in the Spec Book, or **Modified** if standard specification should be adjusted. If the **Modified** radio button choice is made, enter information about the adjustments in the **Specification Description** field.

12. Click on the **Save Button** Save.

13. Click on the **Add Button** Add and repeat steps 4-11 for other change items as desired.

14. Click on the **Close Button** Close.

The **Haul Road** checkbox allows payment on the item before CCO approval.

Edit a Contract Change Item

To edit a contract change item, perform the following steps.

2. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

3. Locate the desired **change order** in the tree panel.

4. Click on the desired change order.

   OR

   Click on the **plus sign** to the left of the desired change order.

   The associated change instructions, change reasons, and any unassigned change items appear below the change order.

5. Locate the desired change instruction , change reason , or unassigned change item in the tree panel.

6. Click on the desired **change instruction** or **change reason**.

   For change instructions and change reasons, the associated change items display in the list panel on the right.

   Then select (highlight) the desired **change item** in the list panel.

   OR

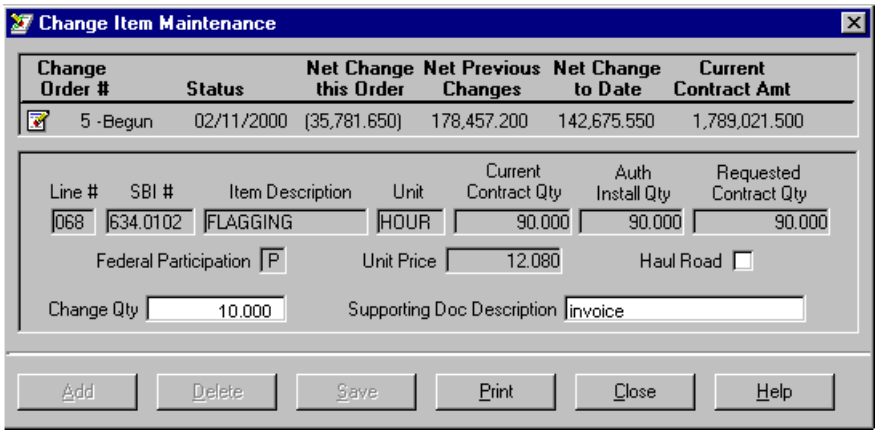
   Select (highlight) the desired **unassigned change item** in the tree panel.

7. Click on the **Change Item Button** .

   OR

   If the desired change item is in the list panel, double click on the **change item**.

The Change Item Maintenance Window appears as shown below.



8. Edit the desired information.

9. Click on the **Save Button** Save.

10. Click on the **Close Button** Close.

Delete a Contract Change Item

To delete a contract change item, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Locate the desired **change order** in the tree panel.

3. Click on the desired change order.

   OR

   Click on the **plus sign** to the left of the desired change order.

   The associated change instructions, change reasons, and any unassigned change items appear below the change order.

4. Locate the desired change instruction , change reason , or unassigned change item in the tree panel.

5. Click on the desired **change instruction** or **change reason**.

   For change instructions and change reasons, the associated change items display in the list panel on the right.

   Then select (highlight) the desired **change item** in the list panel.

   OR

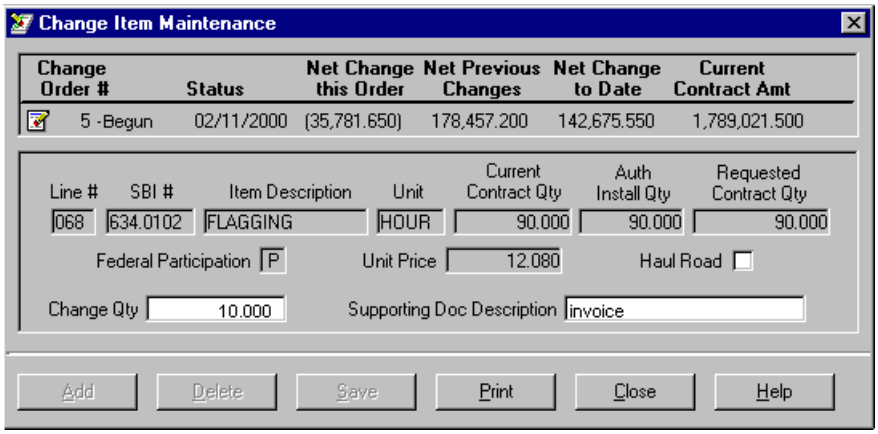
   Select (highlight) the desired **unassigned change item** in the tree panel.

6. Click on the **Change Item Button** .

   OR

   If the desired change item is in the list panel, double click on the **change item**.

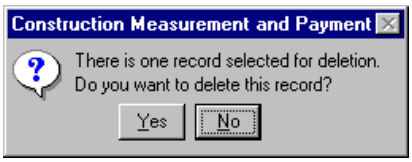
The Change Item Maintenance Window appears as shown below.



7. Verify that this is the change item to delete.

8. Click on the **Delete Button** [Delete] at the bottom of the window.

   CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** [No] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] enters the deletion command into the CM&P System.



9. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

10. Click on the **Save Button** [Save].

    The deletion just made is now recorded.

11. Click on the **Close Button** [Close].

Contract Change Instruction

Create a Contract Change Instruction

To create a contract change instruction, perform the following steps.

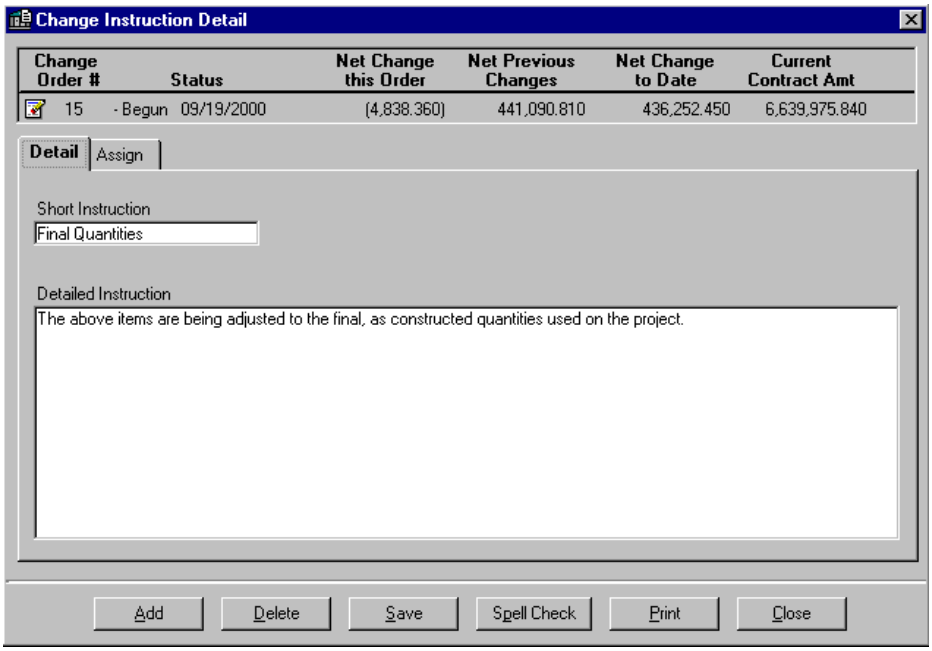
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the Change Instruction Button .

   The Change Instruction Detail Window's Detail Tab appears as shown below.



4. Enter a title for the change instruction in the **Short Instruction** field.

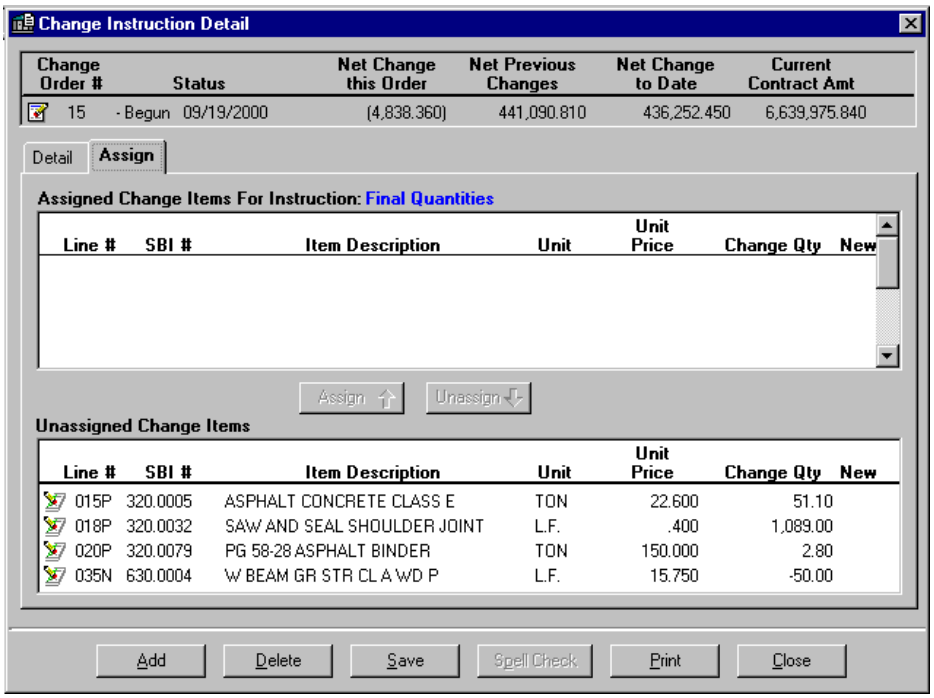
   > The information entered in the **Short Instruction** field will identify the change instruction in the tree panel of the Contract Change Order Window.

5. Enter a detailed description of the change instruction in the **Detailed Instruction** field.

   > The information entered in the **Detailed Instruction** field displays on the DOT 220A Report.

6. Click on the **Assign Tab.**

The Change Instruction Detail Window's Assign Tab appears as shown below.



7. Locate a desired existing change item to be assigned to this change instruction.

> If no change items are currently available, they must be created or unassigned from a different change instruction.

8. Select (highlight) the desired change item in the **Unassigned Change Items** panel and click on the **Assign Button** Assign.

   The change item moves to the **Assigned Change Items for Instruction: [ ]** panel.

   OR

   Double click on the desired change item in the **Unassigned Change Items** panel.

   The change item moves to the **Assigned Change Items for Instruction: [ ]** panel.

> To correct a mistakenly assigned change item, highlight the change item in the **Assigned Change Items for Instruction: [ ]** panel and click on the **Unassign Button** OR double click on the change item. CM&P moves the change item back to the **Unassigned Change Items** panel.

9. Repeat steps 7-8 for other change items as desired.

10. Click on the **Save Button** Save.

11. Click on the **Close Button** Close.

Edit a Contract Change Instruction

To edit a contract change instruction, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Click on the plus sign to the left of the desired **contract change order** in the tree panel.

   OR

   Double click on the desired **contract change order** in the tree panel.

   All of the change items, reasons, and instructions that relate to the selected change order display below it.

3. Select (highlight) the desired **change instruction**.

4. Click on the **Change Instruction Button** .

   The Change Instruction Detail Window's Detail Tab appears.

5. Edit the information in the window as desired, changing to the **Assign Tab** if necessary**.**

6. Click on the **Save Button** Save.

7. Click on the **Close Button** Close.

> For steps 2-3, users may also select (highlight) the desired **contract change order** in the tree panel, then select (highlight) the desired **change instruction** subsequently displayed in the list panel on the right.

Assign a Contract Change Item to a Change Instruction

To assign a contract change item to a contract change instruction, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Click on the plus sign to the left of the desired **contract change order** in the tree panel.

   OR

   Double click on the desired **contract change order** in the tree panel.

   All of the change items, reasons, and instructions that relate to the selected change order display below it.

3. Select (highlight) the desired **change instruction**.

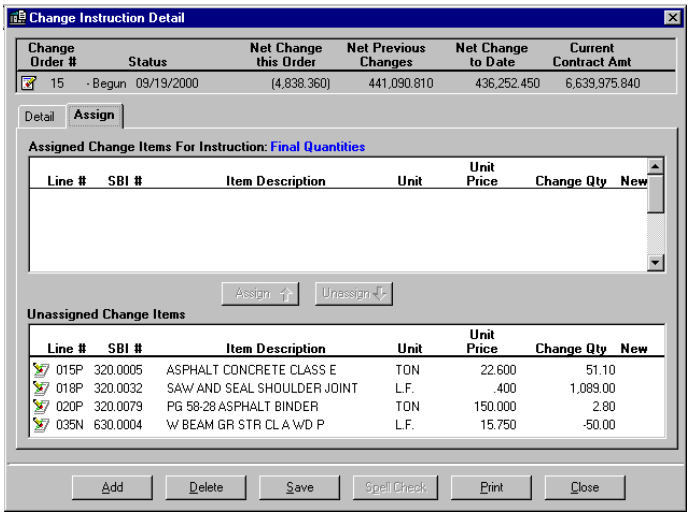
   > If no desirable change instruction is currently available, one must be created. Refer to Create a Contract Change Item if necessary.

4. Click on the **Change Instruction Button** .

   The Change Instruction Detail Window's Detail Tab appears.

5. Click on the **Assign Tab.**

   The Change Instruction Detail Window's Assign Tab appears as shown below.



6. Locate the desired existing change item to be assigned to this change instruction.

If no change items are currently available, they must be created or unassigned from a different change instruction. Refer to Create a Contract Change Item or Unassign a Contract Change Item from a Change Instruction if necessary.

7. Select (highlight) the desired change item in the **Unassigned Change Items** panel and click on the **Assign Button** Assign.

   The change item moves to the **Assigned Change Items for Instruction: [ ]** panel.

   OR

   Double click on the desired change item in the **Unassigned Change Items** panel.

   The change item moves to the **Assigned Change Items for Instruction: [ ]** panel.

To correct a mistakenly assigned change item, highlight the change item in the **Assigned Change Items for Instruction: [ ]** panel and click on the **Unassign Button** OR double click on the change item. CM&P moves the change item back to the **Unassigned Change Items** panel.

8. Repeat steps 7-8 for other change items as desired.

9. Click on the **Save Button** Save.

10. Click on the **Close Button** Close.

For steps 2-3, users may also select (highlight) the desired **contract change order** in the tree panel, then select (highlight) the desired **change instruction** subsequently displayed in the list panel on the right.

Unassign a Contract Change Item from a Change Instruction

To unassign a contract change item from a contract change instruction, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Click on the plus sign to the left of the desired **contract change order** in the tree panel.

   OR

   Double click on the desired **contract change order** in the tree panel.

   All of the change items, reasons, and instructions that relate to the selected change order display below it.

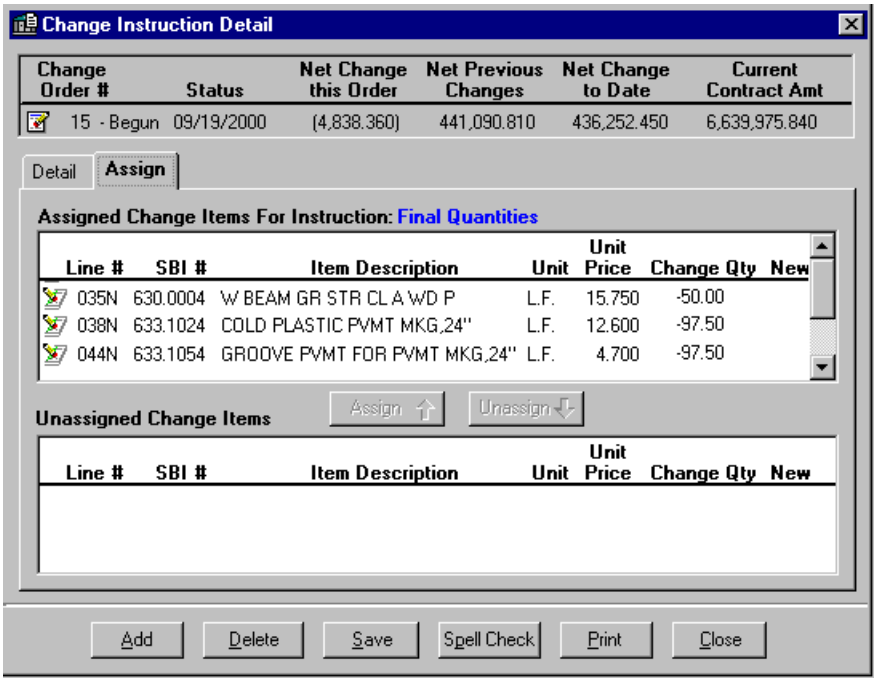
3. Select (highlight) the desired **change instruction**.

4. Click on the **Change Instruction Button** .

   The Change Instruction Detail Window's Detail Tab appears.

5. Click on the **Assign Tab.**

   The Change Instruction Detail Window's Assign Tab appears as shown below.



6. Locate the desired existing change item to be unassigned from this change instruction.

7. Select (highlight) the desired change item in the **Assigned Change Items for Instruction: [ ]** panel and click on the **Unassign Button** Unassign.

   The change item moves to the **Unassigned Change Items** panel.

   OR

   Double click on the desired change item in the **Assigned Change Items for Instruction: [ ]** panel.

   The change item moves to the **Unassigned Change Items** panel.

   To correct a mistakenly unassigned change item, highlight the change item in the **Unassigned Change Items** panel and click on the **Assign Button** OR double click on the change item. CM&P moves the change item to the **Assigned Change Items for Instruction: [ ]** panel.

8. Repeat steps 7-8 for other change items as desired.

9. Click on the **Save Button** Save.

10. Click on the **Close Button** Close.

    For steps 2-3, users may also select (highlight) the desired **contract change order** in the tree panel, then select (highlight) the desired **change instruction** subsequently displayed in the list panel on the right.

Delete a Contract Change Instruction

To delete a contract change instruction, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Click on the plus sign to the left of the desired **contract change order** in the tree panel.

   OR

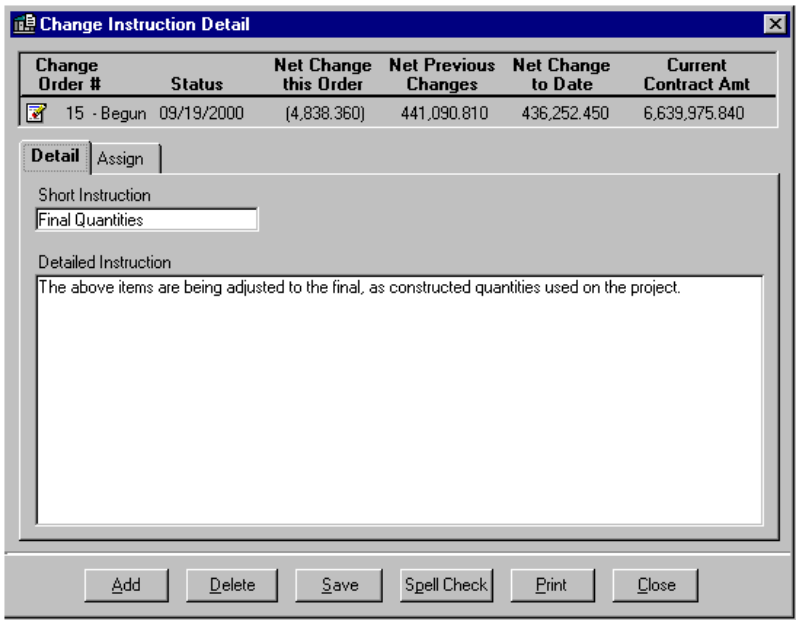
   Double click on the desired **contract change order** in the tree panel.

   All of the change items, reasons, and instructions that relate to the selected change order display below it.

3. Select (highlight) the desired **change instruction**.

4. Click on the **Change Instruction Button** .

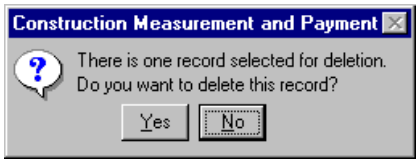
   The Change Instruction Detail Window's Detail Tab appears as shown below.

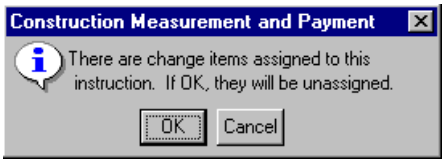


5. Verify that this is the change instruction to delete.

6. Click on the **Delete Button** Delete at the bottom of the window.

CM&P displays a Deletion Confirmation Window as in the examples below. Clicking on the **No Button** [No] or **Cancel Button** [Cancel] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] or **OK Button** [OK] enters the deletion command into the CM&P System.





7. Click on the **Yes Button** [Yes] or **OK Button** [OK].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] or **OK Button** [OK] to save the information as deleted.

8. Click on the **Save Button** [Save].

The deletion just made is now recorded.

9. Click on the **Close Button** [Close].

> For steps 2-3, users may also select (highlight) the desired **contract change order** in the tree panel, then select (highlight) the desired **change instruction** subsequently displayed in the list panel on the right.

Contract Change Reason

Create a Contract Change Reason

To create a contract change reason, perform the following steps.

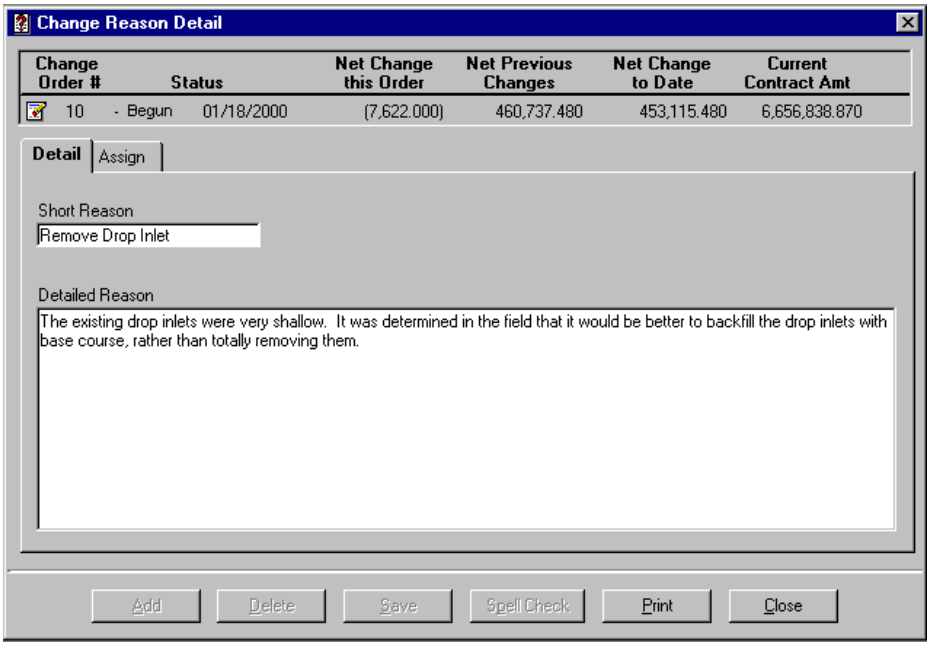
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the **Change Reason Button** .

   The Change Reason Detail Window's Detail Tab appears as shown below.



4. Enter a title for the change reason in the **Short Reason** field.

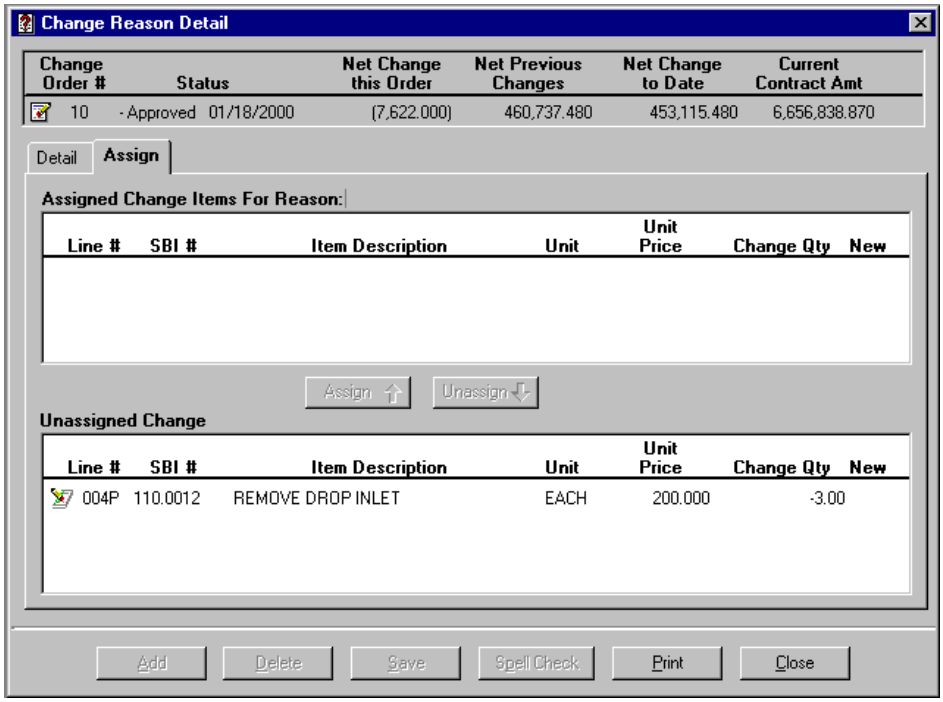
   The information entered in the **Short Reason** field will identify the change reason in the tree panel of the Contract Change Order Window.

5. Enter a detailed description of the change reason in the **Detailed Reason** field.

   The information entered in the **Detailed Reason** field displays on the DOT 220B Report.

6. Click on the **Assign Tab.**

The Change Reason Detail Window's Assign Tab appears as shown below.



7. Locate a desired existing change item to be assigned to this change reason.

> If no change items are currently available, they must be created. Refer to Create a Contract Change Item.

8. Select (highlight) the desired change item in the **Unassigned Change** panel and click on the **Assign Button** [Assign].

   The change item moves to the **Assigned Change Items for Reason: [ ]** panel.

OR

   Double click on the desired change item in the **Unassigned Change** panel.

   The change item moves to the **Assigned Change Items for Reason: [ ]** panel.

> To correct a mistakenly assigned change item, highlight the change item in the **Assigned Change Items for Reason: [ ]** panel and click on the **Unassign Button** OR double click on the change item. CM&P moves the change item back to the **Unassigned Change** panel.

9. Repeat steps 7-8 for other change items as desired.

10. Click on the **Save Button** [Save].

11. Click on the **Close Button** [Close].

Edit a Contract Change Reason

To edit a contract change reason, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Click on the plus sign to the left of the desired **contract change order** in the tree panel.

   OR

   Double click on the desired **contract change order** in the tree panel.

   All of the change items, reasons, and instructions that relate to the selected change order display below it.

3. Select (highlight) the desired **change reason**.

4. Click on the **Change Reason Button** .

   The Change Reason Detail Window's Detail Tab appears.

5. Edit the information in the window as desired, changing to the **Assign Tab** if necessary**.**

6. Click on the **Save Button** Save.

7. Click on the **Close Button** Close.

For steps 2-3, users may also select (highlight) the desired **contract change order** in the tree panel, then select (highlight) the desired **change reason** subsequently displayed in the list panel on the right.

Assign a Contract Change Item to a Change Reason

To assign a contract change item to a contract change reason, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Click on the plus sign to the left of the desired **contract change order** in the tree panel.

   OR

   Double click on the desired **contract change order** in the tree panel.

   All of the change items, reasons, and instructions that relate to the selected change order display below it.

3. Select (highlight) the desired **change reason**.

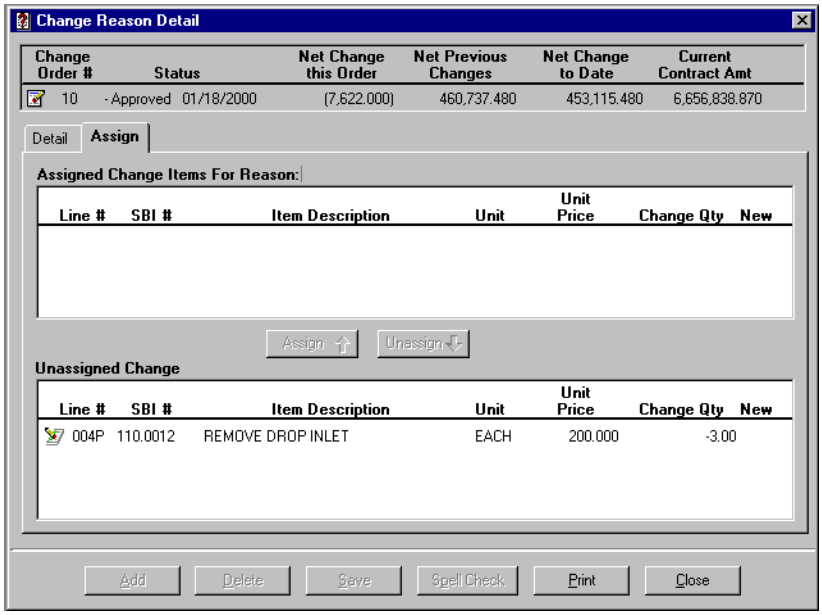
   > If no desirable change reason is currently available, one must be created. Refer to Create a Contract Change Item if necessary.

4. Click on the **Change Reason Button** .

   The Change Reason Detail Window's Detail Tab appears.

5. Click on the **Assign Tab.**

   The Change Reason Detail Window's Assign Tab appears as shown below.



6. Locate the desired existing change item to be assigned to this change reason.

> If no change items are currently available, they must be created or unassigned from a different change reason. Refer to Create a Contract Change Item or to Unassign a Contract Change Item from a Change Reason if necessary.

7. Select (highlight) the desired change item in the **Unassigned Change** panel and click on the **Assign Button** [Assign].

   The change item moves to the **Assigned Change Items for Reason: [ ]** panel.

   OR

   Double click on the desired change item in the **Unassigned Change** panel.

   The change item moves to the **Assigned Change Items for Reason: [ ]** panel.

> To correct a mistakenly assigned change item, highlight the change item in the **Assigned Change Items for Reason: [ ]** panel and click on the **Unassign Button** OR double click on the change item. CM&P moves the change item back to the **Unassigned Change** panel.

8. Repeat steps 6-7 for other change items as desired.

9. Click on the **Save Button** [Save].

10. Click on the **Close Button** [Close].

> For steps 2-3, users may also select (highlight) the desired **contract change order** in the tree panel, then select (highlight) the desired **change reason** subsequently displayed in the list panel on the right.

Unassign a Contract Change Item from a Change Reason

To unassign a contract change item from a contract change reason, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Click on the plus sign to the left of the desired **contract change order** in the tree panel.

   OR

   Double click on the desired **contract change order** in the tree panel.

   All of the change items, reasons, and instructions that relate to the selected change order display below it.

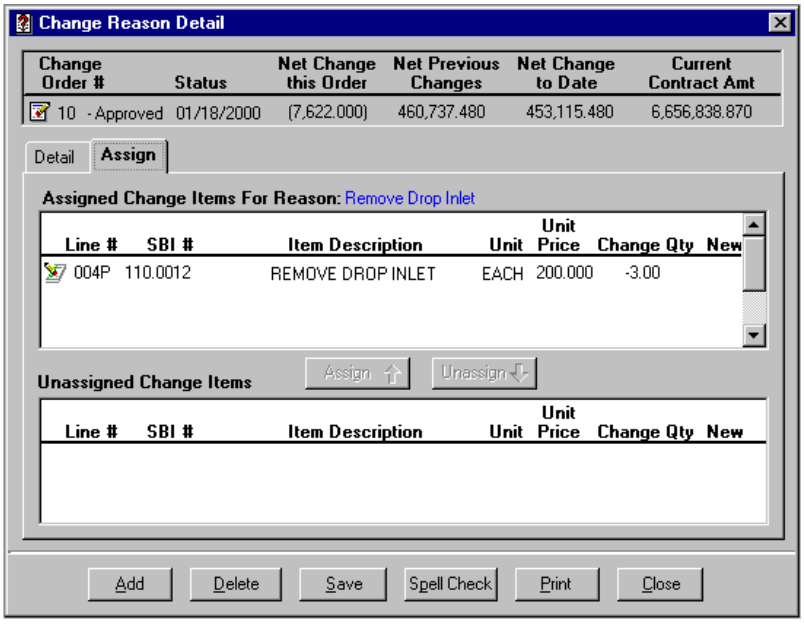
3. Select (highlight) the desired **change reason**.

4. Click on the **Change Reason Button** .

   The Change Reason Detail Window's Detail Tab appears.

5. Click on the **Assign Tab.**

   The Change Reason Detail Window's Assign Tab appears as shown below.



6. Locate the desired existing change item to be unassigned from this change reason.

7. Select (highlight) the desired change item in the **Assigned Change Items for Reason: [ ]** panel and click on the **Unassign Button** Unassign.

   The change item moves to the **Unassigned Change** panel.

OR

   Double click on the desired change item in the **Assigned Change Items for Reason: [ ]** panel.

   The change item moves to the **Unassigned Change** panel.

> To correct a mistakenly unassigned change item, highlight the change item in the **Unassigned Change** panel and click on the **Assign Button** OR double click on the change item. CM&P moves the change item to the **Assigned Change Items for Reason: [ ]** panel.

8. Repeat steps 6-7 for other change items as desired.

9. Click on the **Save Button** Save.

10. Click on the **Close Button** Close.

> For steps 2-3, users may also select (highlight) the desired **contract change order** in the tree panel, then select (highlight) the desired **change reason** subsequently displayed in the list panel on the right.

Delete a Contract Change Reason

To delete a contract change reason, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Click on the plus sign to the left of the desired **contract change order** in the tree panel.

   OR

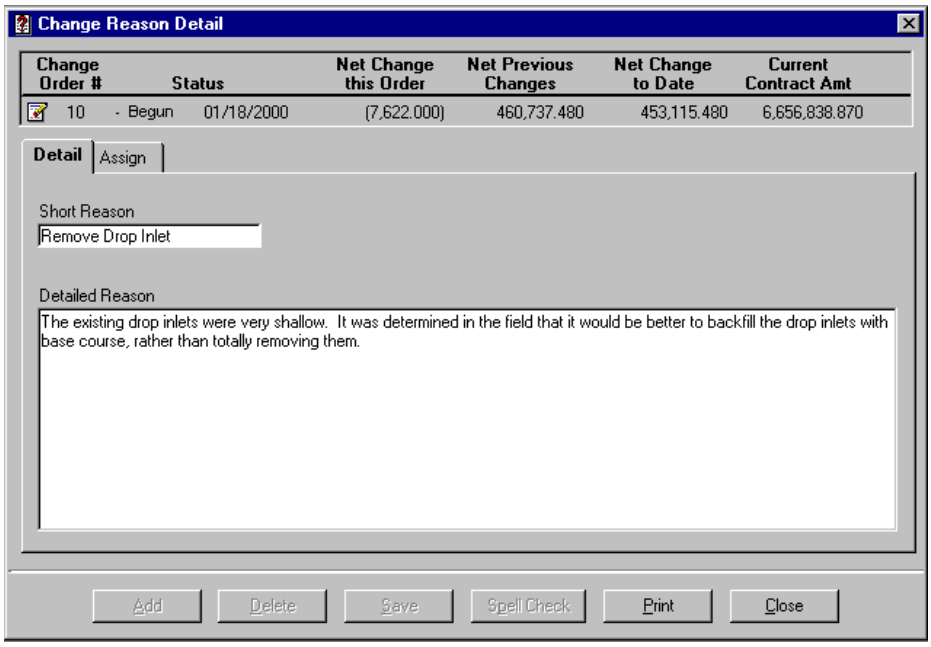
   Double click on the desired **contract change order** in the tree panel.

   All of the change items, reasons, and instructions that relate to the selected change order display below it.

3. Select (highlight) the desired **change reason**.

4. Click on the **Change Reason Button** .

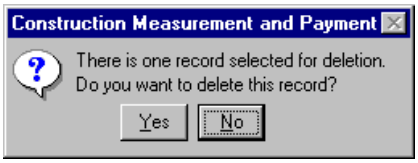
   The Change Reason Detail Window's Detail Tab appears as shown below.

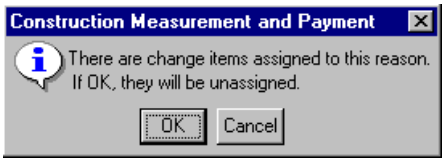


5. Verify that this is the change reason to delete.

6. Click on the **Delete Button** Delete at the bottom of the window.

CM&P displays a Deletion Confirmation Window as in the examples below. Clicking on the **No Button** [No] or **Cancel Button** [Cancel] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] or **OK Button** [OK] enters the deletion command into the CM&P System.





7. Click on the **Yes Button** [Yes] or **OK Button** [OK].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] or **OK Button** [OK] to save the information as deleted.

8. Click on the **Save Button** [Save].

The deletion just made is now recorded.

9. Click on the **Close Button** [Close].

> For steps 2-3, users may also select (highlight) the desired **contract change order** in the tree panel, then select (highlight) the desired **change reason** subsequently displayed in the list panel on the right.

Contract Change Order Review Procedures

Mark a Contract Change Order as Reviewed

To mark a contract change order as reviewed, perform the following steps.

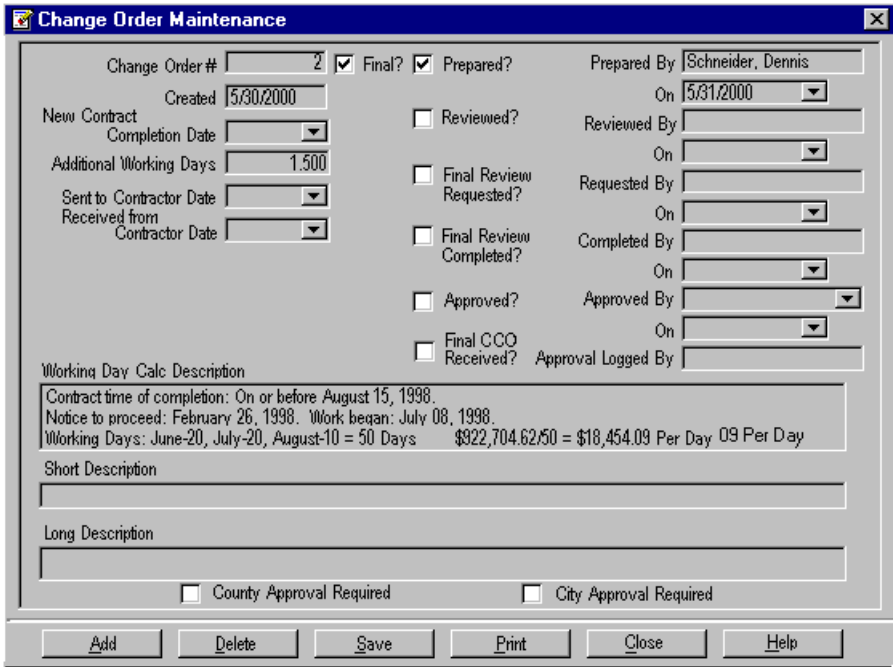
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the **Change Order Button** on the Contract Change Order Toolbar.

   The Change Order Maintenance Window appears as shown below.



4. Click on the **Reviewed?** checkbox.

   A checkmark appears in the box. Information is also automatically entered in the **Reviewed By** and **On** fields to the right of the checked box. Users can edit the information in the **On** field (by clicking on the downward-pointing arrow next to the field and selecting the proper information from the resulting dropdown calendar). However, the information in the **Reviewed By** field cannot be changed.

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

Mark a Contract Change Order as Final Review Requested

To mark a contract change order as having had the final review requested, perform the following steps.

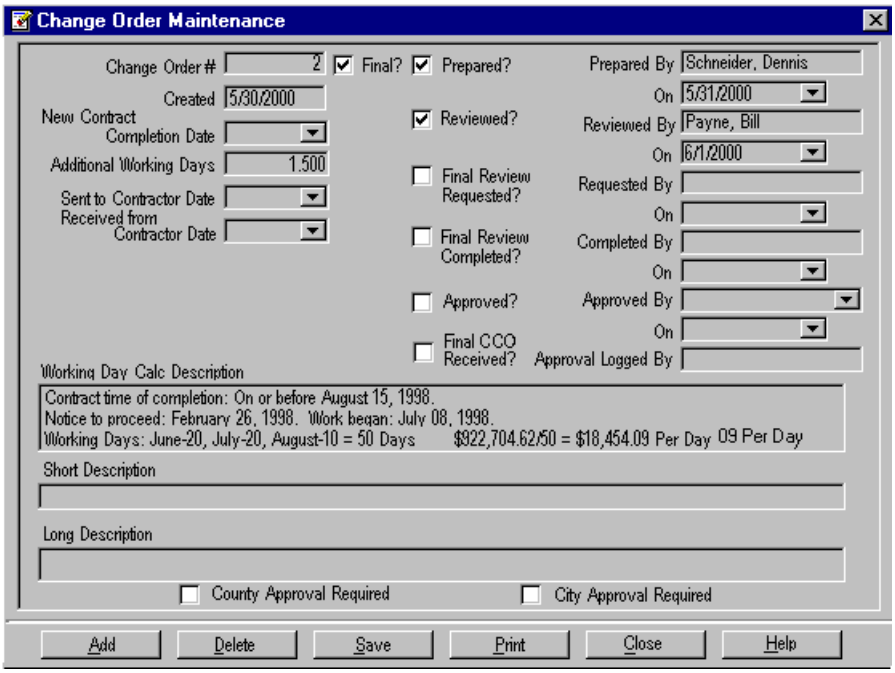
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the **Change Order Button** on the Contract Change Order Toolbar.

   The Change Order Maintenance Window appears as shown below.



4. Click on the **Final Review Requested?** checkbox.

   A checkmark appears in the box. Information is also automatically entered in the **Requested By** and **On** fields to the right of the checked box. Users can edit the information in the **On** field (by clicking on the downward-pointing arrow next to the field and selecting the proper information from the resulting dropdown calendar). However, the information in the **Requested By** field cannot be changed.

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

Mark a Contract Change Order as Final Review Completed

To mark a contract change order as having had the final review completed, perform the following steps.

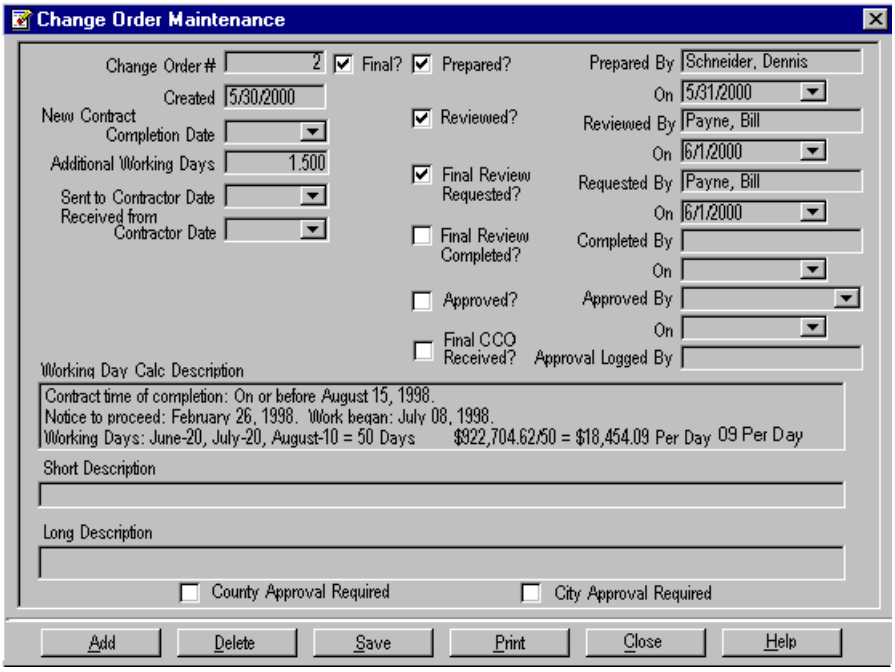
1. From the CM&P Frame Toolbar, click on the **Contract Change Order Button** .

   The Contract Change Order Window appears below the Contract Change Order Toolbar.

2. Select (highlight) the desired **contract change order** in the tree panel.

3. Click on the **Change Order Button** on the Contract Change Order Toolbar.

   The Change Order Maintenance Window appears as shown below.



4. Click on the **Final Review Completed?** checkbox.

   A checkmark appears in the box. Information is also automatically entered in the **Completed By** and **On** fields to the right of the checked box. Users can edit the information in the **On** field (by clicking on the downward-pointing arrow next to the field and selecting the proper information from the resulting dropdown calendar). However, the information in the **Completed By** field cannot be changed.

5. Click on the **Save Button** Save at the bottom of the window.

6. Click on the **Close Button** Close at the bottom of the window.

12. Contract Issues

Contract Issue Window

The Contract Issue – Specification Deviation Window is reached through the **Contract Issue Button** on the Frame bar Toolbar or through the menu path: **Goto, Issue/Spec Dev**. Using buttons on the Contract Issues Toolbar shown below, users can create or delete a contract issue, as well as group or split out DOT 18's. From this window, they can also edit a contract issue or resolve a contract issue.

The **Print Button** allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **Add Button** clears-- it does not delete-- the information in the currently active window and allows users to enter information about a new item.

The **Delete Button** allows users to permanently remove information, deleting the data displayed in the window.

The **Save Button** records all of the work performed since the last save command was performed. Users are encouraged to save information frequently to prevent losing data. Only saving changes or additions before closing the window will allow the changes to enter the CM&P System.

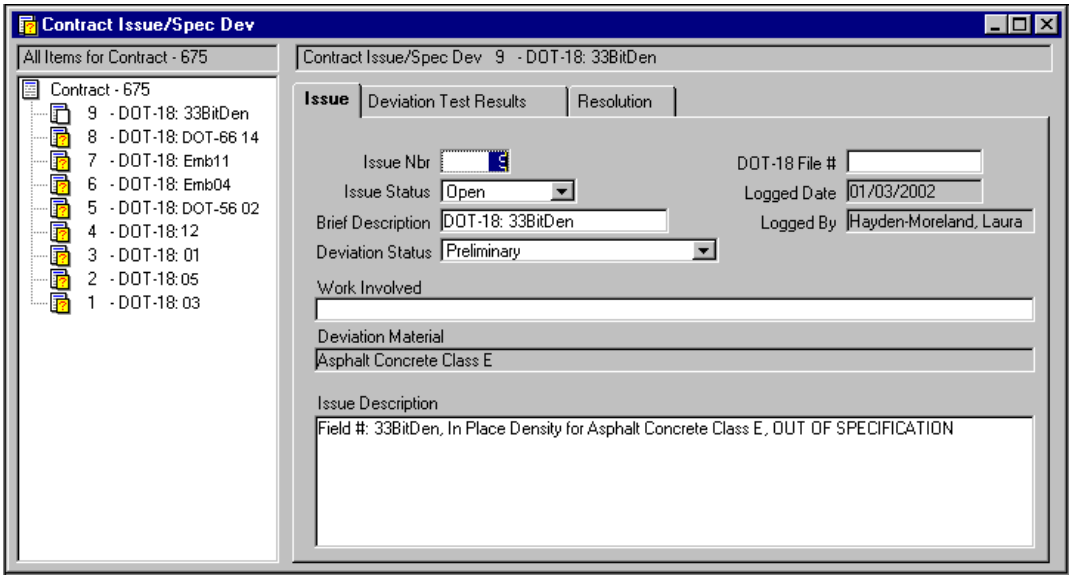
The **Group DOT 18's Button** allows users to create a single DOT 18 from multiple DOT 18's.

The **Split a DOT 18 Button** allows users to create multiple DOT 18's from a single DOT 18.

The **Help Button** allows users to retrieve help from the application's online help file. If the specific information required is not supplied immediately, try searching the Help Topics panel to the left of the main Help panel.

The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.

Issue Tab



The **Issue Number** field contains the identifying number of the issue and is supplied automatically by the CM&P System, but users may change this number as desired.

The **Issue Status** field allows users to designate a status from the dropdown choices. Issue status information will appear in the Management Notification Window.

The **Brief Description** field contains a description of the issue that will be displayed to identify the issue in the Contract Issue-Spec Dev Window's tree panel. If the issue is a failed material test result, the CM&P System will automatically supply the information, but users may change this to allow for the issue to be more easily identified.

The **Deviation Status** field allows users to designate a status from the dropdown choices.

The **Work Involved** field allows users to record work involved in the failing test.

The **Deviation Material** field contains the failing material supplied by the CM&P System.

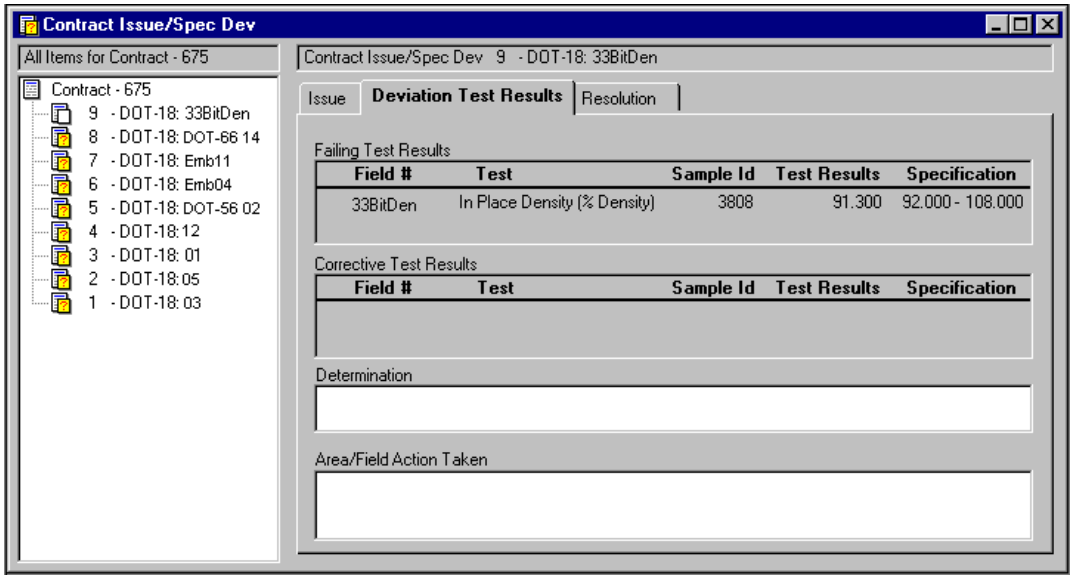
The **Issue Description** field contains information about the issue supplied automatically by the CM&P System, but users may change this to more accurately describe the issue.

The **DOT-18 File #** field allows users to designate where the DOT-18 is to be filed if printed.

The **Logged Date** field contains the date (supplied by the CM&P System) that the issue was entered into the CM&P System.

The **Logged By** field contains the name of the person entering the contract issue and is filled automatically by the CM&P System.

Deviation Test Results Tab



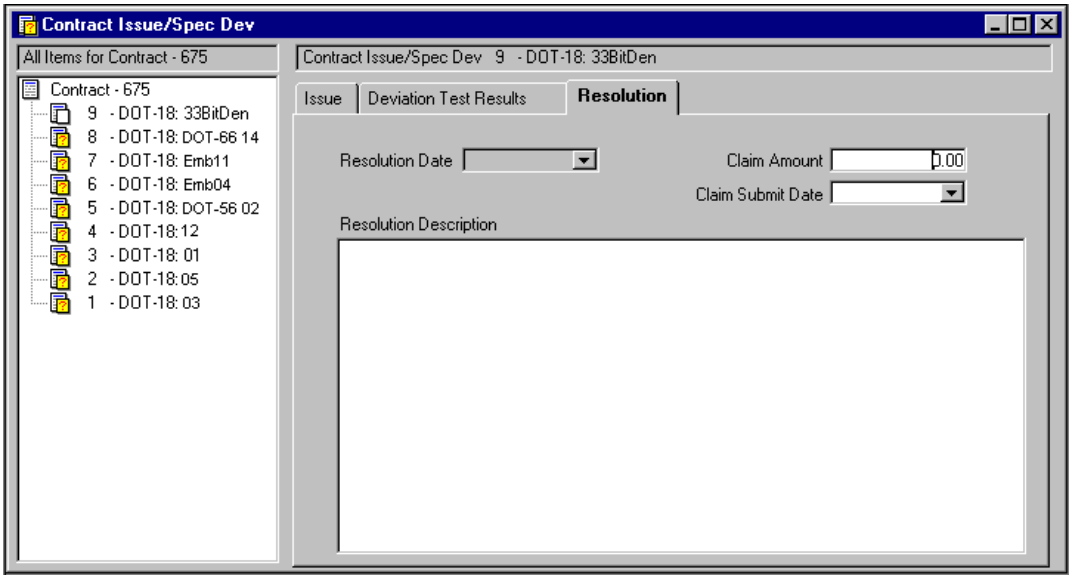
The **Failing Test Results** field contains information automatically supplied from the MS&T System about the material that deviated from specifications, including the test, test date, test results, and the specifications not met.

The **Corrective Test Results** field contains information automatically supplied from the MS&T System about the test performed after failing material was discovered, including the test, test date, test results, and the specifications for the test.

The **Determination** field allows users to enter an explanation of the deviation and their determination of it.

The **Area/Field Action Taken** field allows users to enter information about how the material deviation was handled by DOT personnel.

Resolution Tab



Once an issue is marked as Resolved in the **Issue Status** field on the **Issue** tab of the Contract Issue/Spec Dev Window, the **Resolution Date** field becomes available for entry of the resolution date. Users may also select the desired date from the field's dropdown calendar.

In the **Resolution Description** field, enter information about the resolution.

The **Claim Amount** field contains the amount of the financial discrepancy between the DOT and the other party.

The **Claim Submit Date** field contains the date on which the claim was submitted for the contract issue or material specification deviation.

Contract Issues

Create a Contract Issue

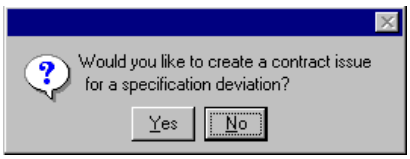
To create a contract issue unrelated to a specification deviation, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Issue Button** .

   The Contract Issue Window displays below the Contract Issue toolbar.

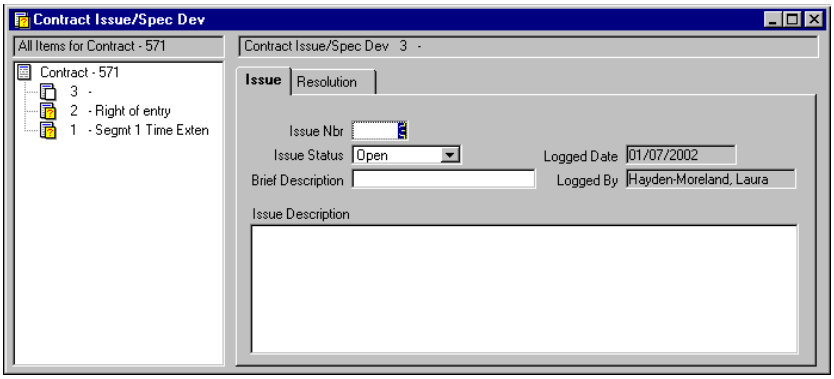
2. Click on the **Add Button** .

   A CM&P prompt box appears as shown below.



3. Click on the **No Button** .

   The Issue Tab appears as shown below.



4. Select the appropriate issue status from the **Issue Status** field's drop-down list.

5. Enter a recognizable description of the new contract issue in the **Brief Description** field. (This description functions as the name of the issue in the tree panel.)

6. Enter a description of the new contract issue in the **Issue Description** field.

7. Click on the **Save Button** .

8. Repeat steps 2-7 for any additional contract issues if desired.

9. Click on the **Close Button** .

Edit a Contract Issue

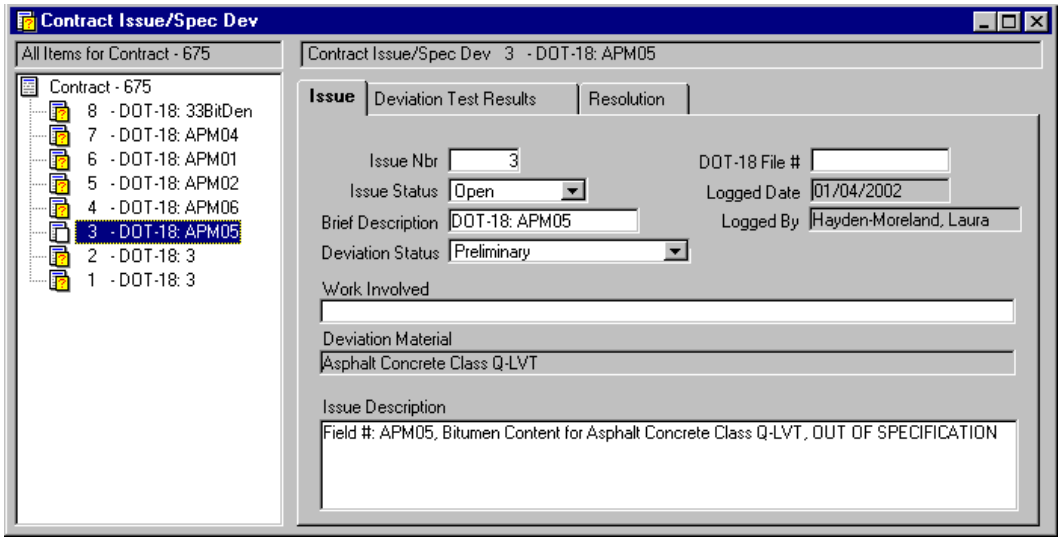
To edit a contract issue/specification deviation, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Issue Button** .

   The Contract Issue Window displays below the Contract Issue toolbar.

2. Click on the desired **contract issue** in the left panel.

   The information about the selected contract issue appears in the appropriate fields in the right panel's tabs as shown below.



3. Edit the desired information on the various tabs in the right panel.

4. Click on the **Save Button** .

5. Click on the **Close Button** .

View a Contract Issue

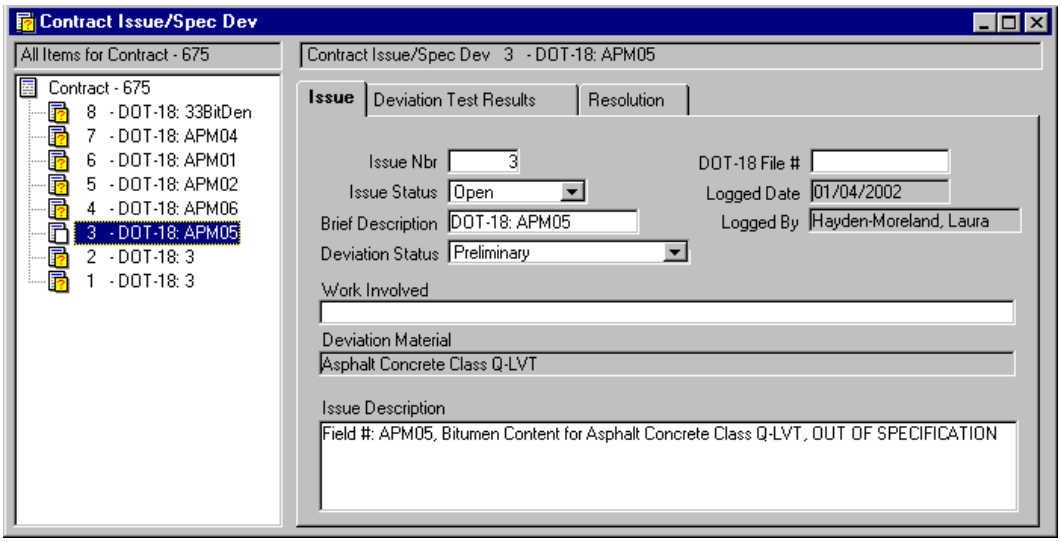
To view a contract issue/specification deviation, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Issue Button** .

   The Contract Issue Window displays below the Contract Issue toolbar.

2. Click on the desired **contract issue** in the left panel.

   The information about the selected contract issue appears in the appropriate fields in the right panel's tabs as shown below.



3. View the desired information in the right panel, clicking on the various tabs as needed.

4. Click on the **Close Button** .

Delete a Contract Issue

To delete a contract issue not created from a material specification deviation, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Issue Button** .

   The Contract Issue Window displays below the Contract Issue toolbar.

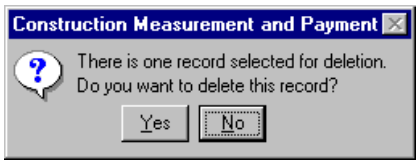
2. Click on the desired **contract issue** in the left panel.

   The information about the selected contract issue appears in the appropriate fields in the right panel's tabs.

3. Verify that this is the desired contract issue to delete.

4. Click on the **Delete Button** above the window.

   CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** enters the deletion command into the CM&P System.



5. Click on the **Yes Button** .

   At this point, the information has not yet been deleted. The **Save Button** must be used after clicking on the **Yes Button** to save the information as deleted.

6. Click on the **Save Button** .

   The deletion just made is now recorded.

7. Click on the **Close Button** .

Resolve a Contract Issue

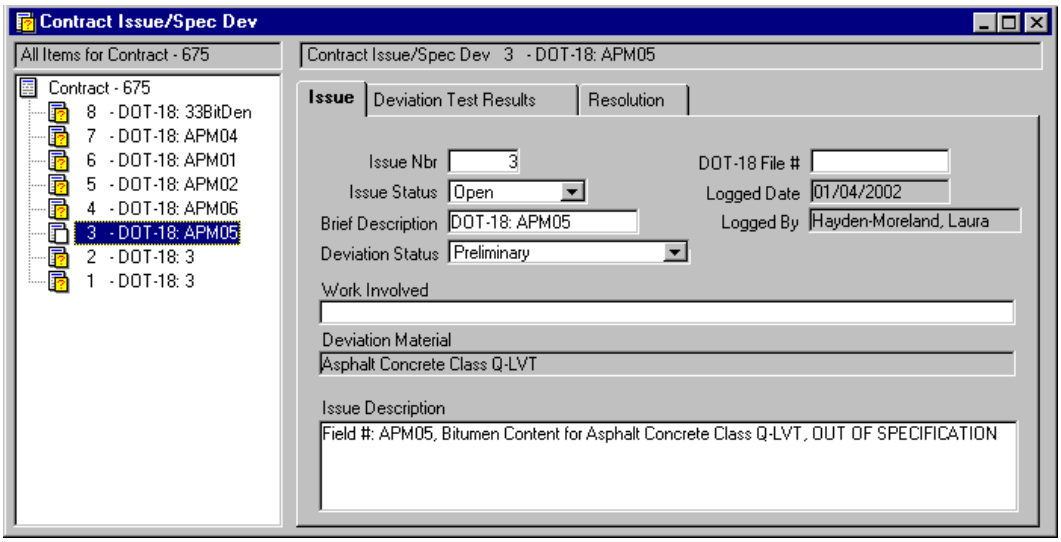
To resolve a contract issue/specification deviation, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Issue Button** .

   The Contract Issue Window displays below the Contract Issue toolbar.

2. Click on the desired **contract issue** in the left panel.

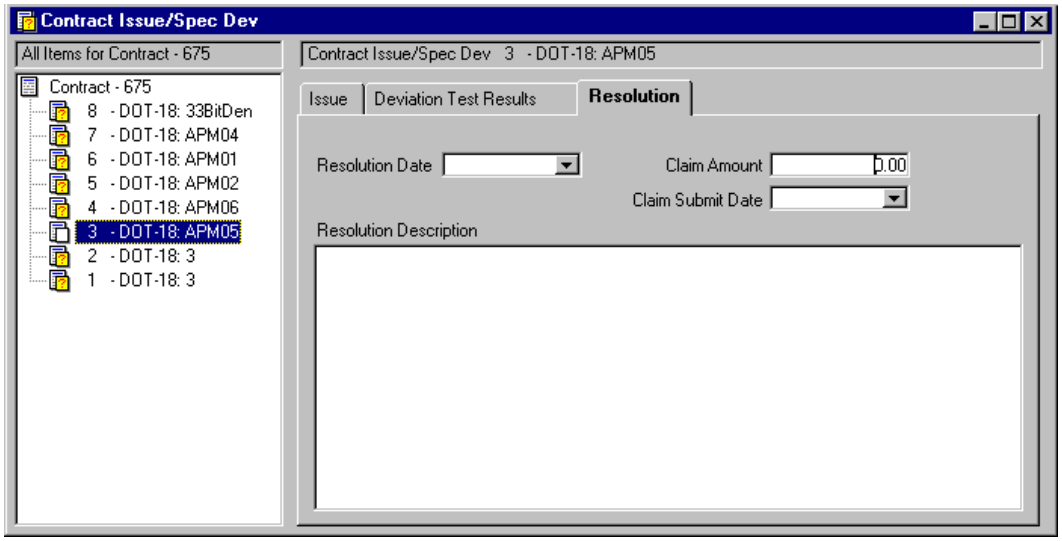
   The information about the selected contract issue appears in the appropriate fields in the right panel's tabs as shown below.



3. Select the appropriate deviation status from the **Deviation Status** field's drop-down list: **Resolved**.

4. Click on the **Resolution Tab**.

The Resolution Tab displays as shown below.



5. Enter the resolution date in the **Resolution Date** field either by typing the information (two-digit month, two-digit day, two-digit year format) or by selecting the appropriate date from the dropdown calendar.

6. Enter the dollar amount of the resolution (if applicable) in the **Claim Amount** field.

7. Enter the date the claim was submitted (if applicable) in the **Claim Submit Date** field either by typing the information (two-digit month, two-digit day, two-digit year format) or by selecting the appropriate date from the dropdown calendar.

8. Enter a detailed description of the resolution in the **Resolution Description** field.

9. Click on the **Save Button** .

10. Repeat steps 2-9 as desired to resolve other contract issues for the contract.

11. Click on the **Close Button** .

> A contract issue created from a material specification deviation cannot be deleted. It must be resolved.

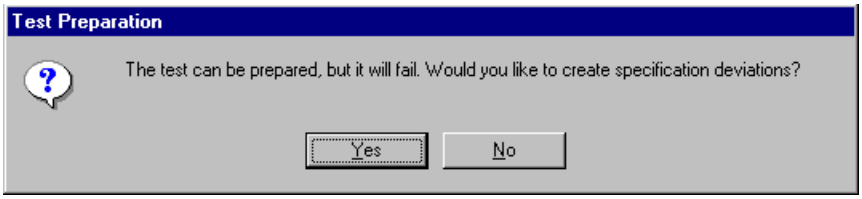
Spec Dev Contract Issues

Create a Specification Deviation Contract Issue

To create a Specification Deviation Contract Issue, perform the following steps.

1. In MS&T, enter a failing test. On the Test Results Panel, click on the **Prepared** checkbox.

   MS&T will give a failing test message as shown below.



2. Click on the **Yes Button** Yes to create a specification deviation contract issue in CM&P.

3. Click on the **Finish Button** Finish or the **Apply Button** Apply to save the failed test as having a specification deviation contract issue.

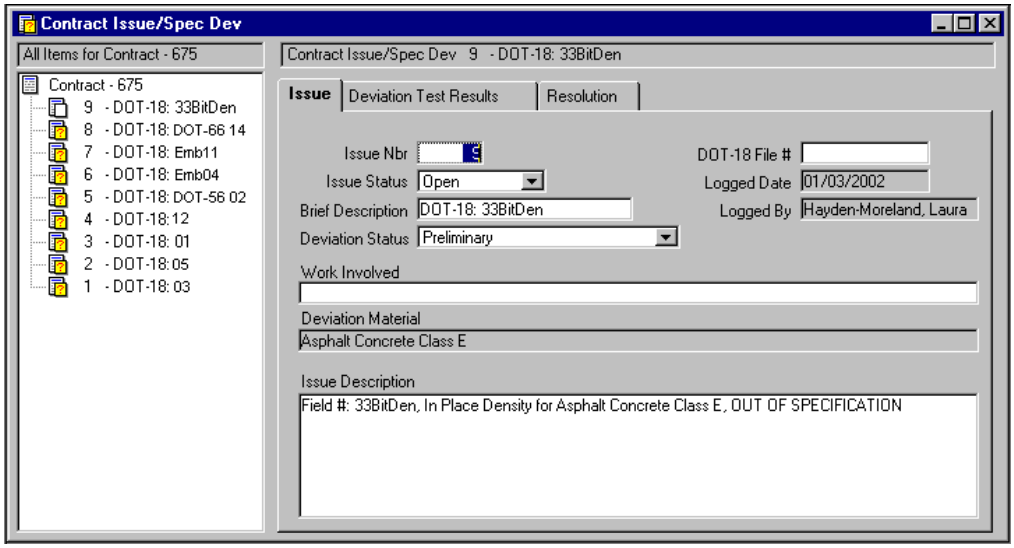
4. At some point after the MS&T application is closed, open the CM&P application.

5. From the CM&P Frame Toolbar, click on the **Contract Issue Button** .

   The Contract Issue Window displays below the Contract Issue toolbar. Contract Issues are listed in the tree panel on the left. The Spec Dev already created from the MS&T prompt appears in the list temporarily titled with **DOT-18:** and the MS&T sample's field number.

6. In the tree panel, select (highlight) the contract issue created in MS&T.

The Issue tab appears for the selected contract issue as shown below.



7. Choose the desired **Issue Status** from the field's dropdown listing.

8. Change the information in the **Brief Description** field as desired to change the name of the contract issue in the tree panel.

> If this is left with the MS&T field number as supplied by CM&P, any future changes to the field number in MS&T will not be reflected here.

9. Enter the desired number in the **DOT-18 File #** field. This information will aid in filing a printed DOT-18 Report.

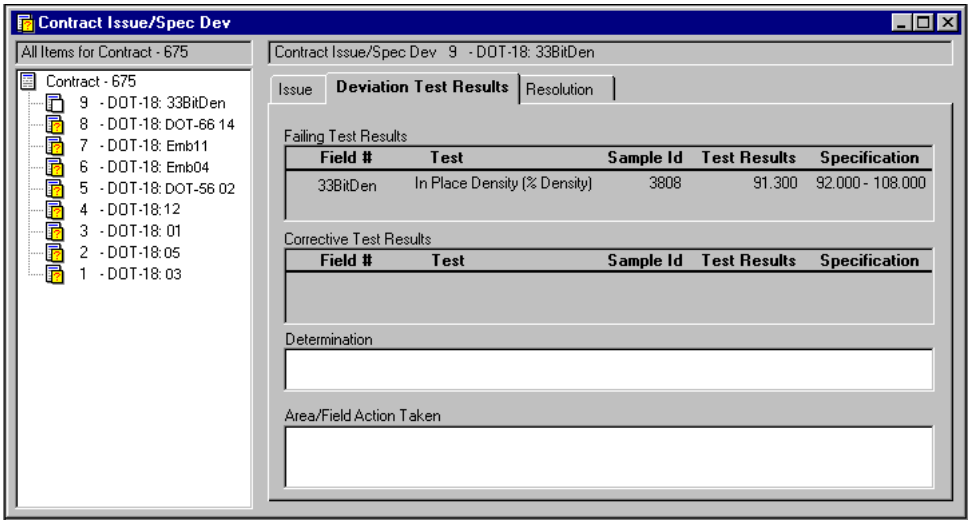
10. Choose the desired **Deviation Status** from the field's dropdown list.

11. Enter the desired information in the **Work Involved** field. This information will be included in the DOT-18 Report.

12. Review and/or edit the information supplied in the **Issue Description** field. This information will be included in the Contract Issue Report.

13. Click on the Deviation Test Results Tab.

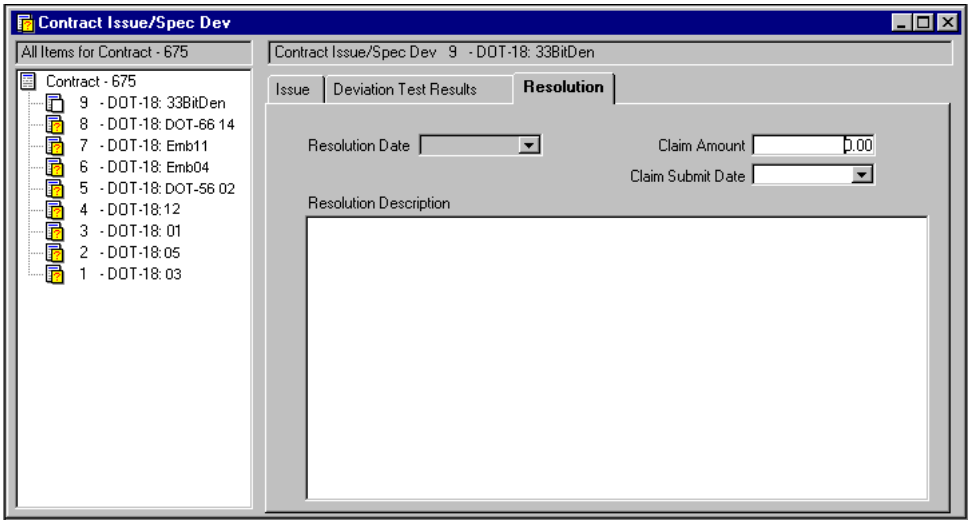
The Deviation Test Results Tab displays as shown below.



14. Enter the desired information in the **Determination** and **Area/Field Action Taken** fields. This information is displayed on the DOT 18 Report.

15. If any claim information is to be recorded, click on the Resolution Tab.

    The Resolution Tab displays as shown below.



16. Enter the desired amount in the **Claim Amount** field and the appropriate date in the **Claim Submit Date** field.

17. Click on the **Save Button** .

18. Click on the **Close Window Button** .

Combine Individual DOT 18's into a Group DOT 18

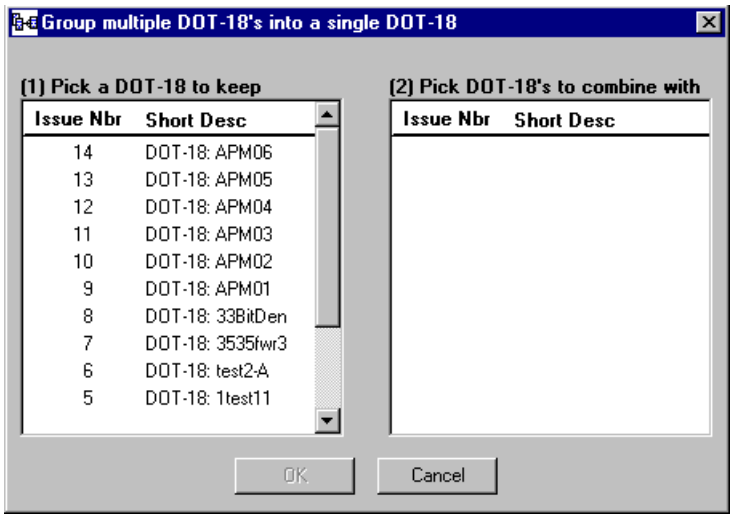
To combine individual DOT 18's into a group DOT 18 for the Report of Specification Deviation (DOT 18) perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Issue Button** .

   The Contract Issue Window displays below the Contract Issue toolbar.

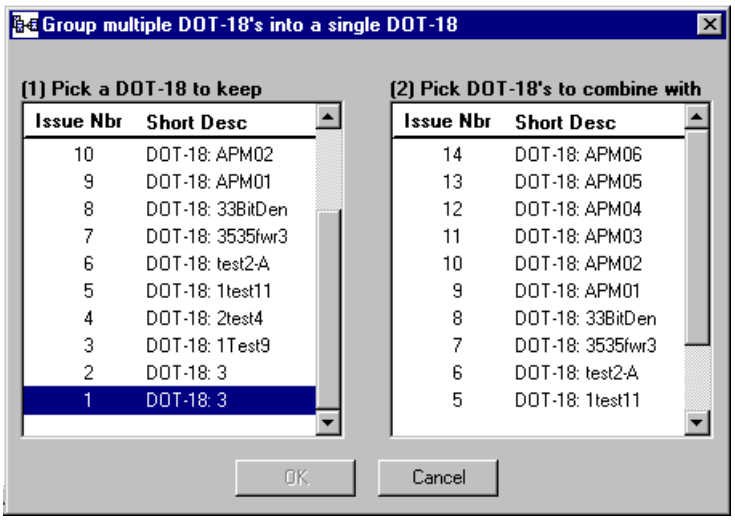
2. Click on the **Group DOT 18's Button** .

   The Group multiple DOT-18's into a single DOT-18 Window appears as shown below.



3. In the left panel, select (highlight) the contract issue which will contain all of the combined DOT-18's when the process is finished. This contract issue will provide the issue description for all of the included DOT-18's, but each of their test results will appear separately in the listing on its Deviation Test Results tab.

DOT-18's available for combining with the selected DOT-18 appear in the right panel as shown below.



4. In the right panel, select (highlight) the desired issue(s) to include with the specified DOT-18.

5. Click on the **OK Button** OK

   The window closes. CM&P returns to the Contract Issue/Spec Dev Window with the specified DOT-18 selected (highlighted).

6. If desired, click on the Deviation Test Results tab to verify that the correct DOT-18's have been combined with the specified DOT-18.

7. If desired, follow the menu path: **Reports**, **Report of Specification Deviation (DOT 18)** to view and/or print the DOT 18 report for the grouping just made.

Split Individual DOT 18's from a Group DOT 18

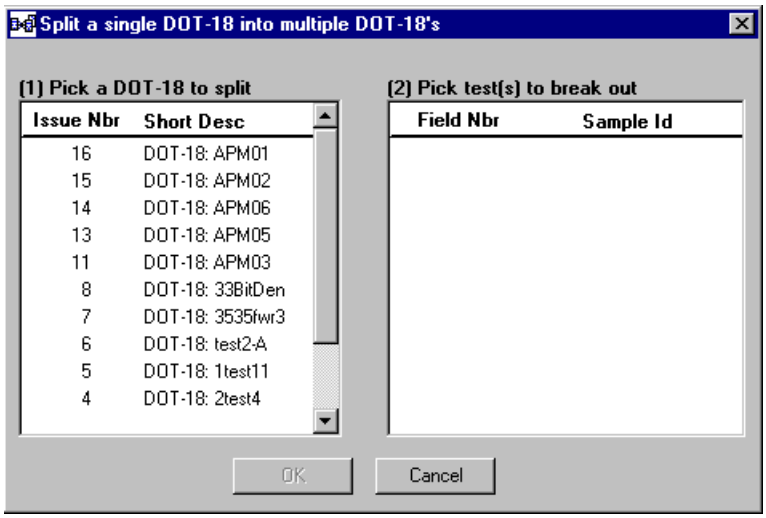
To split individual DOT-18's from a group DOT-18, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Issue Button** .

   The Contract Issue Window displays below the Contract Issue toolbar.

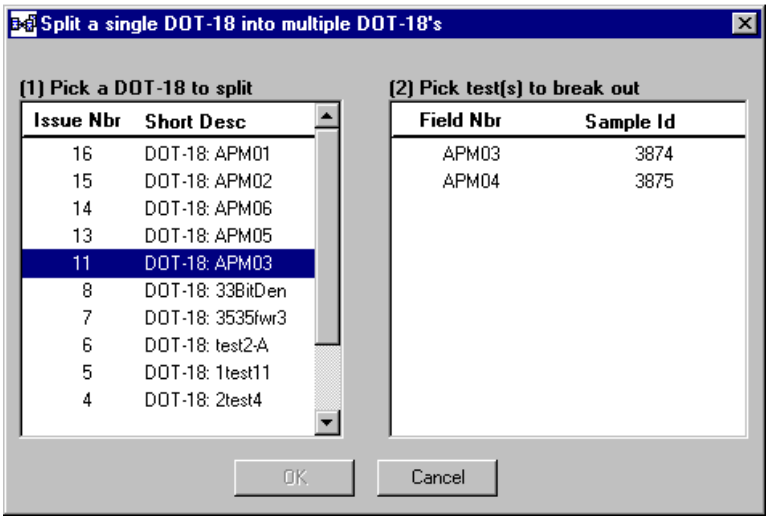
2. Click on the **Split a DOT-18 Button** .

   The Split a single DOT-18 into multiple DOT-18's Window appears as shown below.



3. In the left panel, select (highlight) the contract issue that contains all of the DOT-18's to be split out. This contract issue will provide the issue description for all of the included DOT-18's as they are split out from the group, but their issue descriptions can be changed as desired.

DOT-18's available for splitting off from the selected DOT-18 appear in the right panel as shown below.



4. In the right panel, select (highlight) the desired issue(s) to remove from the specified DOT-18.

> The original DOT-18 should not be selected to be split off from itself. CM&P will not allow all DOT-18's to be removed from the grouping.

5. Click on the **OK Button** OK.

   The window closes. CM&P returns to the Contract Issue/Spec Dev Window with the specified DOT-18 selected (highlighted) and the split out DOT-18's listed and numbered at the top of the column as now being the most recently created.

6. If desired, click on the Deviation Test Results tab to verify the removal of the other DOT-18('s) from the specified DOT-18.

7. If desired, follow the menu path: **Reports**, **Report of Specification Deviation (DOT 18)** to view and/or print the DOT 18 report for the DOT 18 just reduced.

> Users may choose at this point to renumber and/or rename the split out DOT-18's by making changes to their **Issue Number** and/or **Brief Description** fields.

View Deviation Test Results

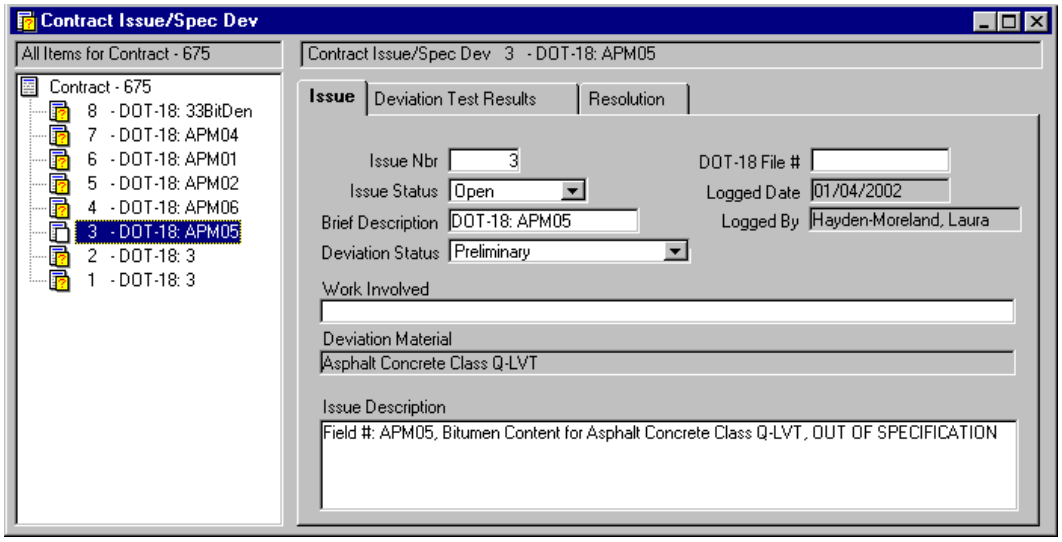
To view the deviation test results for a specification deviation contract issue, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Issue Button** .

   The Contract Issue Window displays below the Contract Issue toolbar.

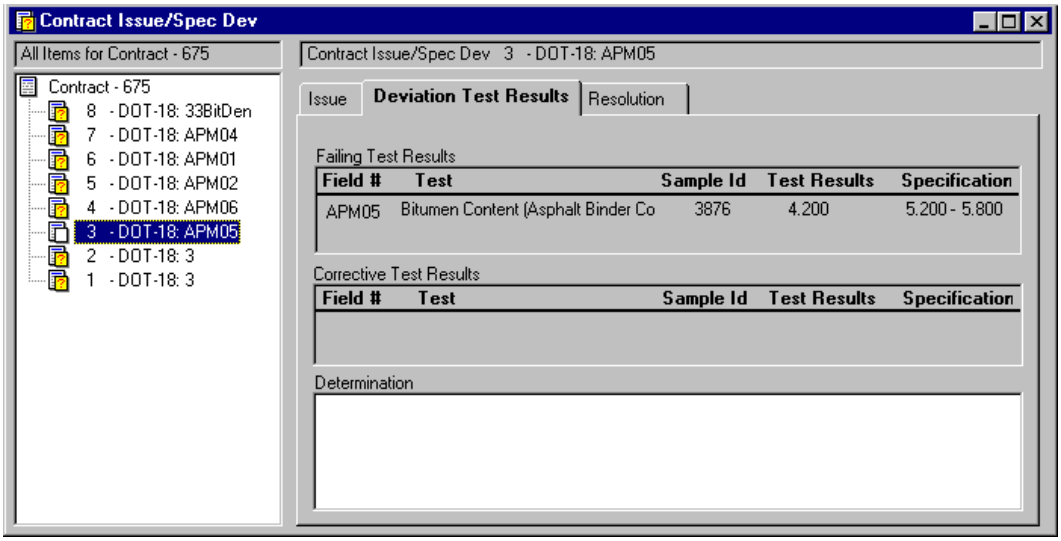
2. Click on the desired **contract issue** in the left panel.

   The information about the selected contract issue appears in the appropriate fields in the right panel's tabs as shown below.



3. Click on the Deviation Test Results tab.

The Deviation Test Results tab appears as shown below.



4. View the deviation test results.

5. Click on the **Close Button** .

13. Work Authorization

Work Authorization Window

The Work Authorization Window is reached through the **Work Authorization Button** on the Frame bar Toolbar or through the menu path: **Goto, Work Authorization**. Using the buttons on the toolbar below, users can create a work authorization or delete a work authorization. From this window, they can also edit work authorizations.

The **Print Button** allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **Add Button** clears-- it does not delete-- the information in the currently active window and allows users to enter information about a new item.

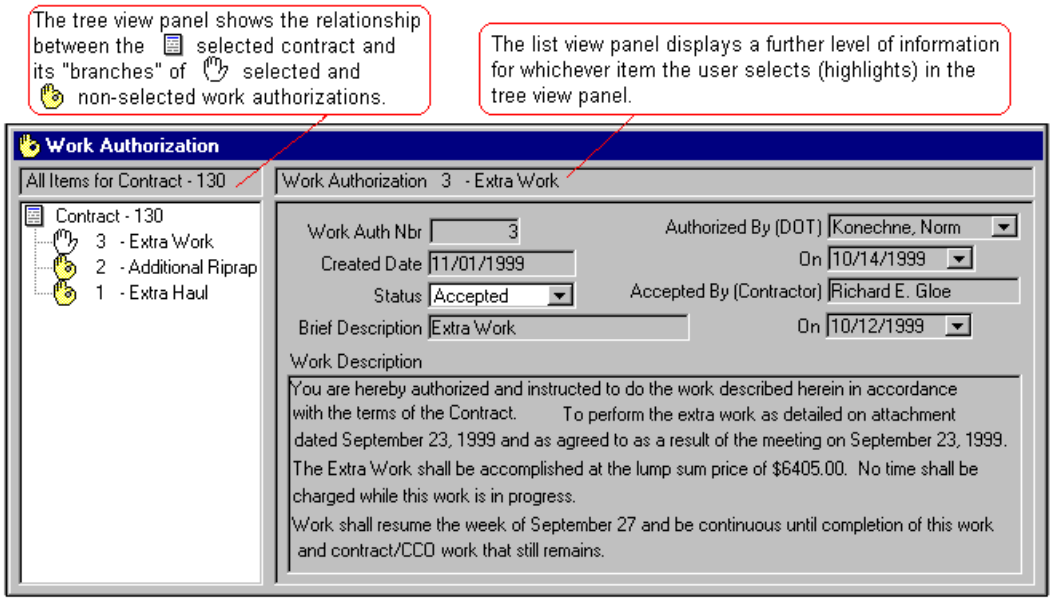
The **Delete Button** allows users to permanently remove information, deleting the data displayed in the window.

The **Save Button** records all of the work performed since the last save command was performed. Users are encouraged to save information frequently to prevent losing data. Only saving changes or additions before closing the window will allow the changes to enter the CM&P System.

The **Help Button** allows users to retrieve help from the application's online help file. If the specific information required is not supplied immediately, try searching the Help Topics panel to the left of the main Help panel.

The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.

The Work Authorization Window also allows users to select and view individual work authorizations for the contract as shown in the drilled down and annotated example below.



The **Work Authorization Number** field contains the identifying number of the work authorization and is supplied automatically by the CM&P System.

The **Created Date** field contains the date (supplied by the CM&P System) that the CM&P System generated and numbered the work authorization.

The **Status** field offers users a dropdown choice of options to define the status of the work authorization, including Open, Accepted, and Dropped.

The **Brief Description** field contains a description of the work authorization that will be displayed to identify the work authorization in the Work Authorization Window's tree panel.

The **Authorized By (DOT)** field contains the name of the person who authorized the new work authorization selected from the field's dropdown listing of DOT employees.

The **(Authorized) On** field contains the date on which the authorization occurred.

The **Accepted By (Contractor)** field contains the name of the person who accepted the new work authorization.

The **(Accepted) On** field contains the date on which contractor acceptance of the work authorization occurred.

The **Work Description** field contains a description of the authorized work that is to be performed.

Create a Work Authorization

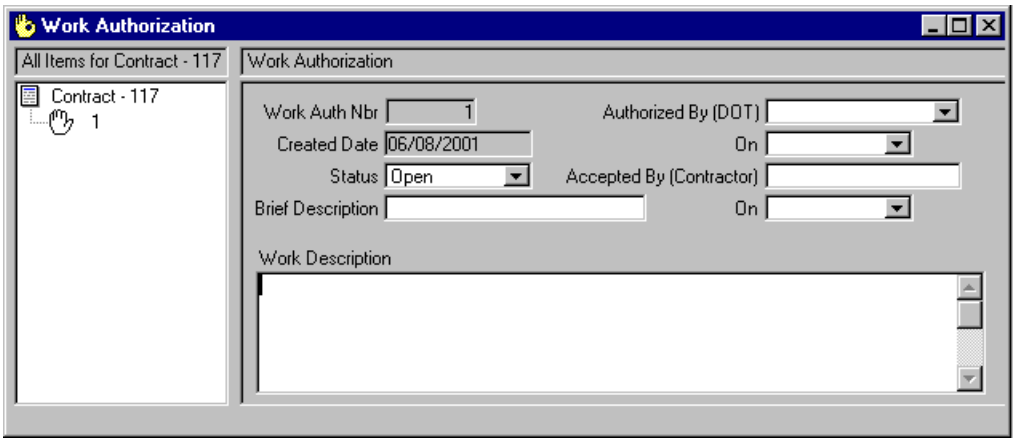
To create a work authorization, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Work Authorization Button** .

   The Work Authorization Window displays below the Work Authorization Toolbar.

2. Click on the **Add Button** .

   A new work authorization is created with a CM&P generated identification number and the created date already specified as shown below.



3. Select the appropriate issue status from the **Status** field's drop-down list.

4. Enter a brief description of the new work authorization in the **Brief Description** field.

> The information entered into the **Brief Description** field is the work authorization "name," which will be displayed in the tree panel on the left when the work authorization is saved.

5. Select the name of the person who authorized the new work authorization from the **Authorized By (DOT)** field's drop-down list.

6. Select the appropriate authorization date from the **(Authorized) On** field's drop-down list.

7. Select the name of the contractor who accepted the new work authorization from the **Accepted By (Contractor)** field's drop-down list.

8. Select the appropriate accepted date from the **Accepted By (Contractor) On** field's drop-down list.

9. Enter a description of the new work authorization in the **Work Description** field.

10. Click on the **Save Button** to save the new work authorization.

11. Click on the **Print Button** to print the new work authorization on your default printer if desired.

12. Click on the **Close Button**.

Edit a Work Authorization

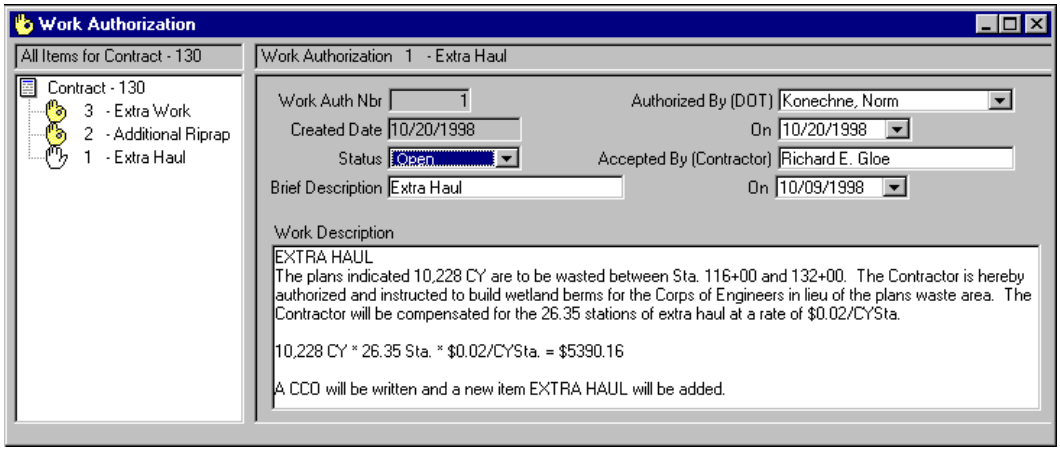
To edit a work authorization, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Work Authorization Button**.

   The Work Authorization Window displays below the Work Authorization Toolbar.

2. Click on the desired **work authorization** from the tree panel.

   The work authorization is displayed in the right panel as shown below.



3. Enter the desired changes.

4. Click on the **Save Button** to save the edited work authorization.

5. Click on the **Print Button** to print the edited work authorization on your default printer if desired.

6. Click on the **Close Button**.

Add an Additional Work Authorization

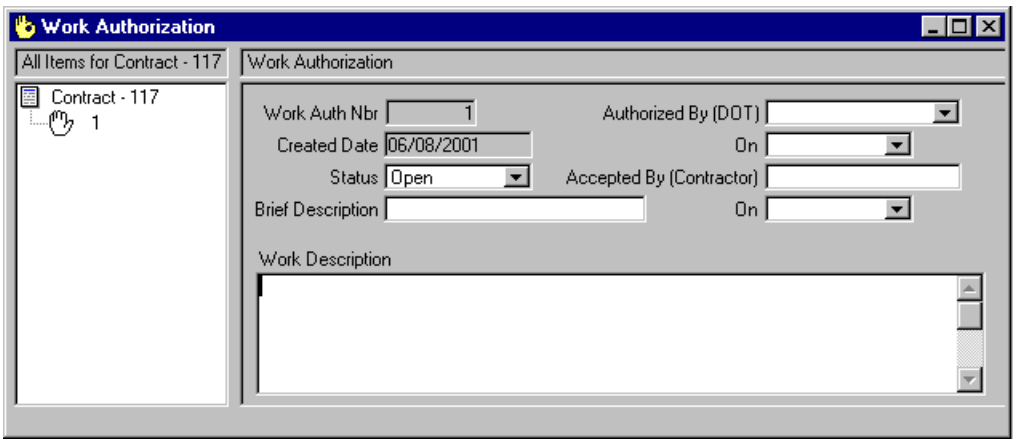
To create an additional work authorization, a work authorization must first be created. To create both work authorizations, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Work Authorization Button** .

   The Work Authorization Window displays below the Work Authorization Toolbar.

2. Click on the **Add Button** .

   A new work authorization is created with a CM&P generated identification number and the created date already specified as shown below.



3. Select the appropriate issue status from the **Status** field's drop-down list.

4. Enter a brief description of the new work authorization in the **Brief Description** field.

> The information users include in the **Brief Description** field is the work authorization "name," which will be displayed in the tree panel on the left when the work authorization is saved.

5. Select the name of the person who authorized the new work authorization from the **Authorized By (DOT)** field's drop-down list.

6. Select the appropriate authorization date from the **(Authorized) On** field's drop-down list.

7. Select the name of the contractor who accepted the new work authorization from the **Accepted By (Contractor)** field's drop-down list.

8. Select the appropriate accepted date from the **Accepted By (Contractor) On** field's drop-down list.

9. Enter a description of the new work authorization in the **Work Description** field.

10. Click on the **Save Button** to save the new work authorization.

11. Click on the **Print Button** to print the new work authorization on your default printer if desired.

12. To create the second or any additional work authorizations, repeat steps 2-11.

13. Click on the **Close Button** .

Delete a Work Authorization

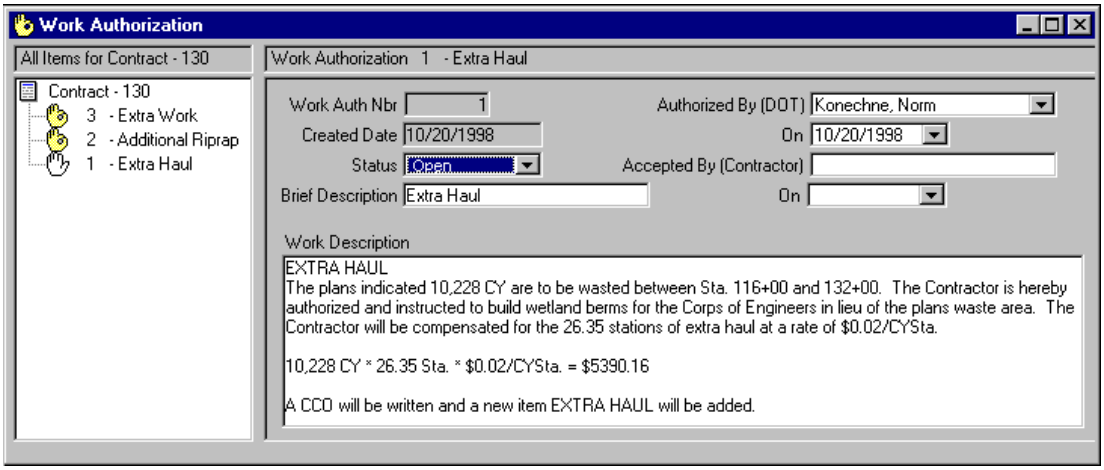
To delete a work authorization, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Work Authorization Button** .

   The Work Authorization Window displays below the Work Authorization Toolbar.

2. Click on the desired **work authorization** from the tree panel.

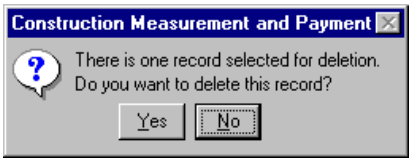
   The work authorization is displayed in the right panel as shown below.



3. Verify that this is the desired work authorization to delete.

4. Click on the **Delete Button** Delete at the bottom of the window.

   CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** No causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** Yes enters the deletion command into the CM&P System.



5. Click on the **Yes Button** Yes.

> At this point, the information has not yet been deleted. The **Save Button** must be used after clicking on the **Yes Button** Yes to save the information as deleted.

6. Click on the **Save Button** .

   The deletion just made is now recorded.

7. Click on the **Close Button** or click on the **Add Button** to create another work authorization.

14. Biweekly Progress Reports

Biweekly Progress Report Window

The Biweekly Progress Report Window is reached through the **Biweekly Progress Report Button** on the Frame bar Toolbar or through the menu path: **Goto, Biweekly Progress Report**. From this window, users can record assessed days and penalty days. They can also report on work in progress as well as record weather, contractor, and contract phase information. Using buttons on the Biweekly Progress Report Toolbar shown below, users can create a biweekly progress report, edit a biweekly progress report, or delete a biweekly progress report.

The **Print Button** allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **Add Button** clears--it does not delete--the information in the currently active window and allows users to enter information about a new item.

The **Delete Button** allows users to permanently remove information, deleting the data displayed in the window.

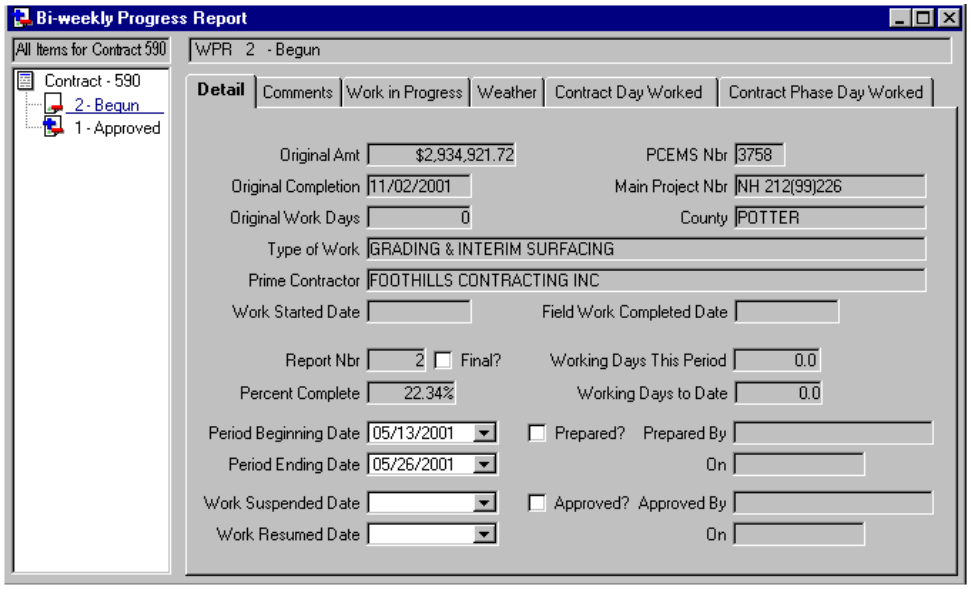
The **Save Button** records all of the work performed since the last save command was performed. Users are encouraged to save information frequently to prevent losing data. Only saving changes or additions before closing the window will allow the changes to enter the CM&P System.

The **Spelling Button** allows users to check the spelling of the entered text for errors before saving it.

The **Help Button** allows users to retrieve help from the application's online help file. If the specific information required is not supplied immediately, try searching the Help Topics panel to the left of the main Help panel.

The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.

Detail Tab



The **Original Amount** field contains the dollar amount agreed upon in the contract.

The **Original Completion** field contains the date that work on a completion date contract is to be finished.

The **Original Work Days** field contains the number of days originally contracted to finish the work and cannot be edited here. To change this information, refer to the **Identifying Tab** of the Manage Contract Window.

The **Type of Work** field contains a description of work called for in the contract.

The **Prime Contractor** field contains the name of the contractor to whom the contract was awarded.

The **Work Started Date** field contains the date that contract work began and cannot be edited here. To change this information, refer to the **Checklist Tab** of the Manage Contract Window.

The **Report Number** field contains the number of the Progress Report currently displayed for the contract selected.

The **Final?** checkbox must be marked if the progress report currently displayed records the last work that will be completed.

The **Percent Complete** field contains the CM&P System's calculation of the amount of contracted work that has already been done. This is computed as the amount of work paid for, up to and including the period ending date of the WPR, divided by the original contract amount.

The **Period Beginning Date** field contains the beginning date of the report period, which must be a Sunday.

The **Period Ending Date** field contains the ending date of the report period (which must be the second Saturday following the Period Beginning Date).

The **Work Suspended Date** field contains the date that the state specified that the contracted work should be stopped (usually because of weather).

The **Work Resumed Date** field contains the date that the state specified the contracted work should begin again.

The **PCEMS (Pre-Construction Engineering Management) Number** field contains the identifying PCEMS number for the contract and cannot be edited here. To change this information, refer to the Project Maintenance Window in the Manage Contract Function.

The **Main Project Number** field contains the identifying number for the contract's main project.

The **County** field contains the name of the county where the contract work is to be done.

If information for this field has not been specified in the Project Maintenance Window, the upper half of the Biweekly Progress Report Window Detail tab will display blank.

The **Field Work Completed Date** field contains the date that the last work was recorded for the contract and cannot be edited.

The **Working Days This Period** field contains the number of days on which work was done during the report period.

The **Working Days to Date** field contains the number of days that work toward the completion of the contract has been recorded as happening.

The **Prepared?** checkbox is marked to indicate completed preparation. Then, the CM&P System automatically supplies information in the **Prepared By** and **On** fields.

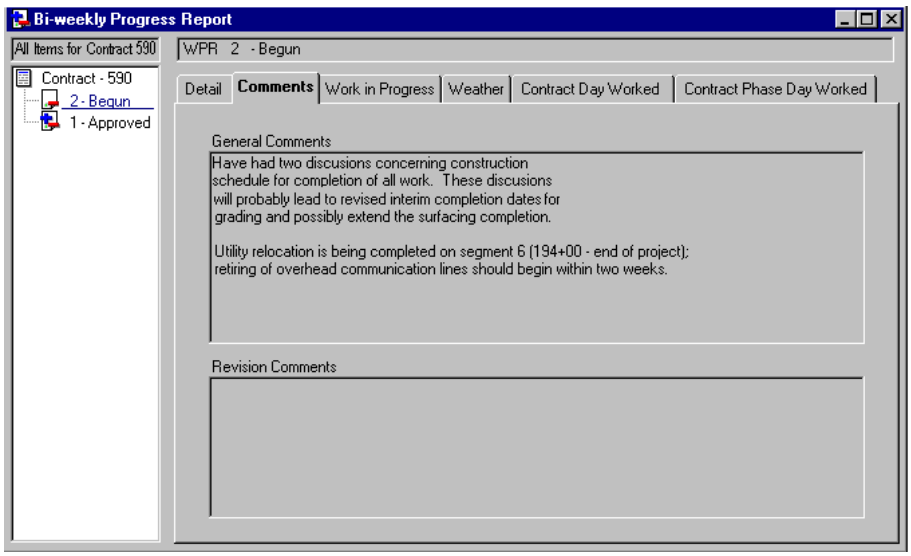
The **Prepared By** field contains the name of the person who marked the **Prepared?** checkbox according to the logon identification the CM&P System received.

The **(Prepared) On** field contains the date that the **Prepared?** checkbox was marked.

The **Approved?** checkbox must be marked to indicate approval. Then, the CM&P System automatically supplies information in the **Approved By** and **On** fields.

The **(Approved) On** field contains the date that the **Approved?** checkbox was marked.

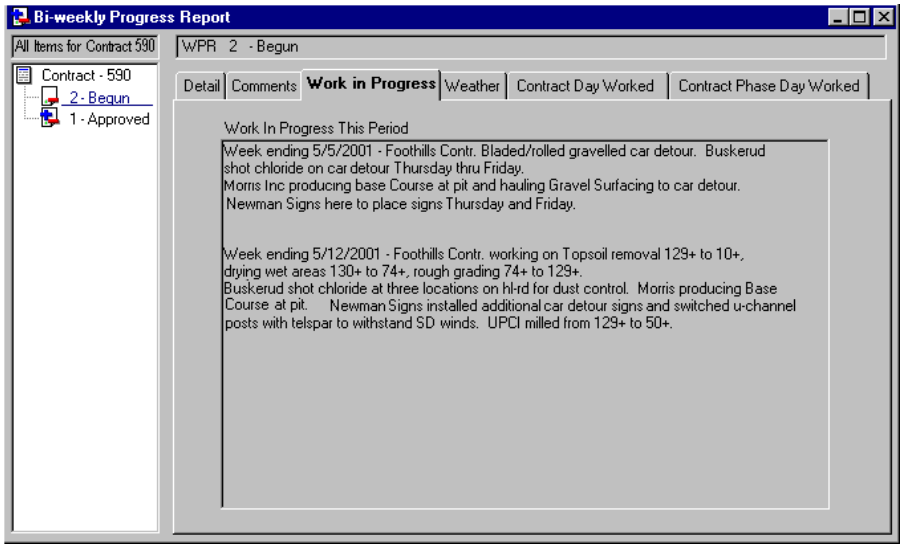
Comments Tab



The **General Comments** field allows users to enter any information believed to be important to the current biweekly progress report.

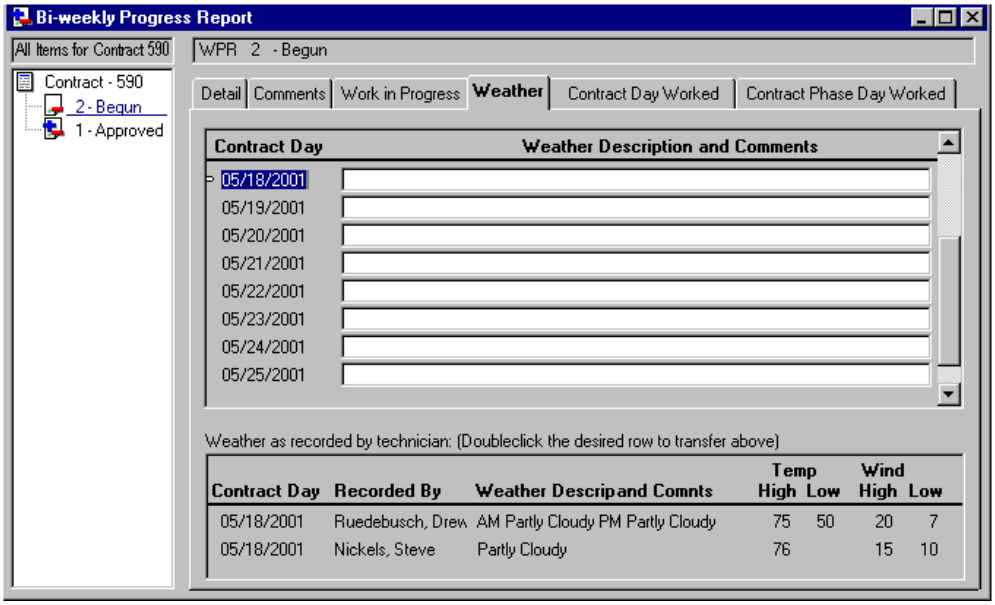
The **Revision Comments** field allows users to enter updates about comments previously made in the **General Comments** field.

Work in Progress Tab



The **Work in Progress This Period** field allows users to specify and elaborate on the work that is currently being performed on the contract.

Weather Tab

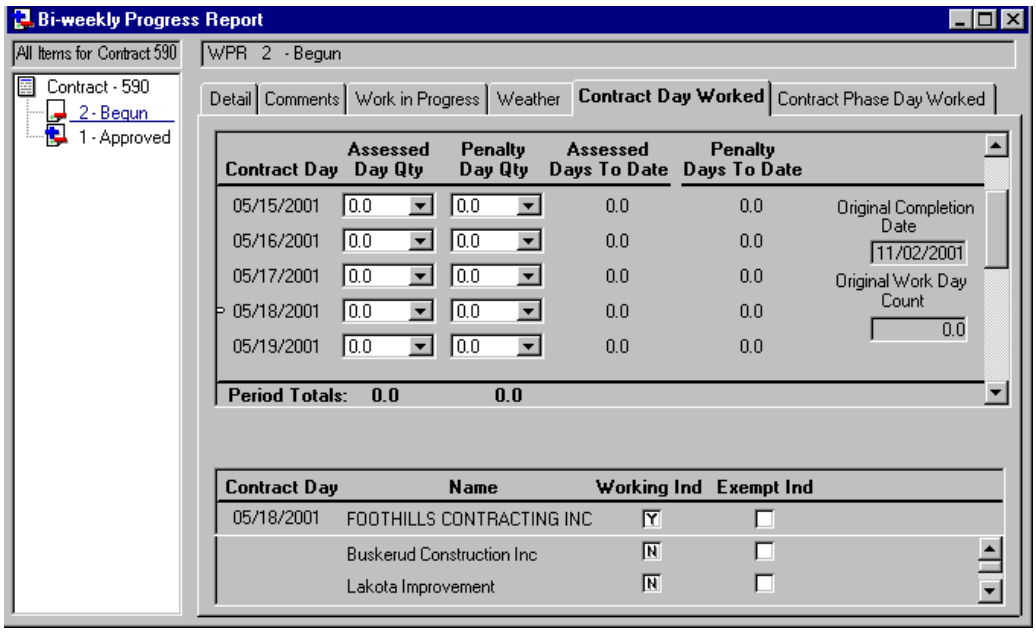


The days listed in the **Contract Day** column are retrieved from the date range entered on the Manage Contract Window **Detail Tab**.

The **Weather Description and Comments** column offers users the opportunity to restate and refine the recorded weather observations.

The **Weather as recorded by technician** panel displays contract days specified on the Manage Contract Window **Detail Tab** along with the weather information and comments recorded by the technician in the field to be included as desired in the upper panel. The system obtains this information when the technician performs the replication process. The user double clicks on the desired row to transfer it up into the **Weather Description and Comments** field where it may be edited as desired.

Contract Day Worked Tab



Assessed and Penalty Day Panel

The days listed in the **Contract Day** column are retrieved from the date range entered on the Manage Contract Window **Detail Tab**.

Users may indicate assessed day quantities in whole and half days of working days in the contract using the **Assessed Day Quantity** field's dropdown choices.

Users may indicate penalty day quantities in whole and half days of working days using the **Penalty Day Quantity** field's dropdown choices.

The **Assessed Days To Date** field contains the number of days accessed up to this point in the contract.

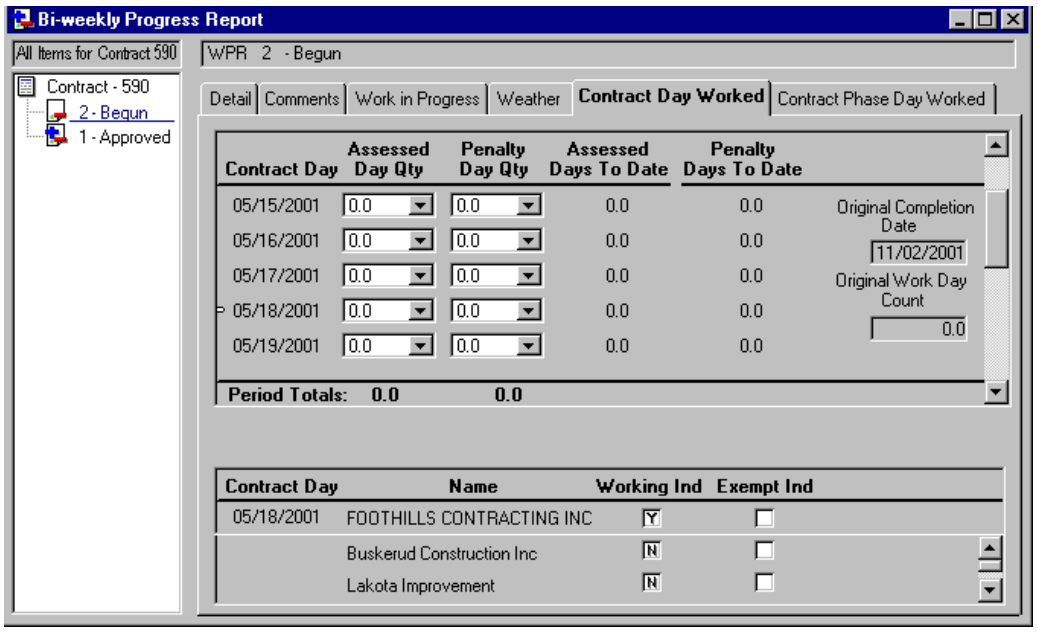
The **Penalty Days To Date** field contains the number of penalty days recorded up to this point in the contract.

The **Original Completion Date** field contains the date that work on a completion date contract is to be finished.

The **Original Work Day Count** field contains the number of working days called for in a working day contract.

The **Period Totals** field contains the number of days for which assessments or penalties were recorded during the report period.

Contract Day Worked Tab (continued)



Contractor Working Day Panel

The days listed in the **Contract Day** column are retrieved from the date range entered on the Manage Contract Window **Detail Tab**.

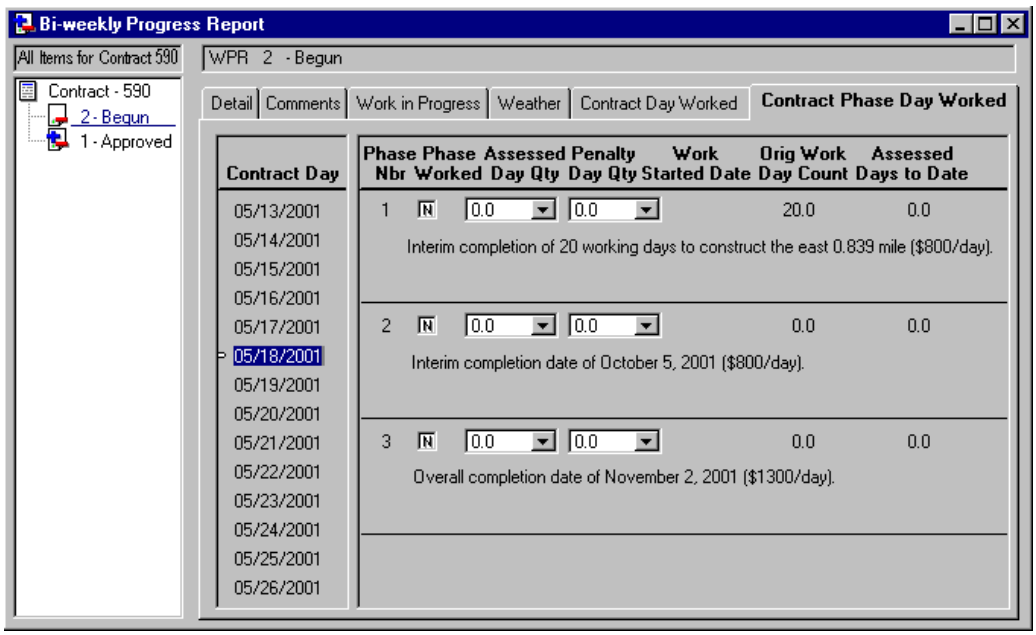
The **prime contractor** is listed first and in capital letters for each contract day.

The **subcontractors** are listed alphabetically after the prime contractor for each contract day.

The **Working Indicator** column allows users to indicate (by choosing **Y** or **N**) whether or not the (sub)contractor performed work on the date selected in the upper panel. If uncertain whether work was done on the date, choose **?**.

The **Exempt Indicator** checkbox allows users to indicate whether a contractor or subcontractor is exempt from the Davis-Bacon Act (and therefore not required to pay prevailing wage rates or submit certified payrolls). This information must be recorded for Labor Compliance. For specific information about exempt status, refer to the *SDDOT Labor Compliance Manual for Contractors*. Basically, there are two ways for contractors to achieve exemption. The first is by working one half a mile or more off-site of the project (such as truckers or material suppliers). The second is by having workers not categorized as laborers (such as architects or engineers, timekeepers, inspectors, watchmen or guards, or people performing administrative or executive duties).

Contract Phase Day Worked Tab



The days listed in the **Contract Day** column are retrieved from the date range entered on the Manage Contract Window **Detail Tab**.

The **Phase Number** field contains the identifying number of the phase as entered in the Contract Phase Maintenance Window.

The **Phase Worked** field allows users to indicate (by choosing either **Y** or **N**) whether or not work for the phase was done on the date. If uncertain whether work for the phase was done on the date, choose **?**.

Users may indicate assessed day quantities in whole and half days of working days in the contract using the **Assessed Day Quantity** field's dropdown choices.

Users may indicate penalty day quantities in whole and half days of working days using the **Penalty Day Quantity** field's dropdown choices.

The **Work Started Date** field contains the date that the phase work was begun as entered in the Contract Phase Maintenance Window.

The **Original Work Day Count** field contains the number of days originally contracted to finish the work and cannot be edited here. To change this information, refer to the **Identifying Tab** of the Manage Contract Window.

The **Assessed Days To Date** field contains the number of days accessed up to this point in the contract.

The **Phase Description** area contains the information about the phase as entered in the Contract Phase Maintenance Window.

Biweekly Progress Reports

Create a Biweekly Progress Report

> A WPR cannot be added and saved if the current contract is no longer open.

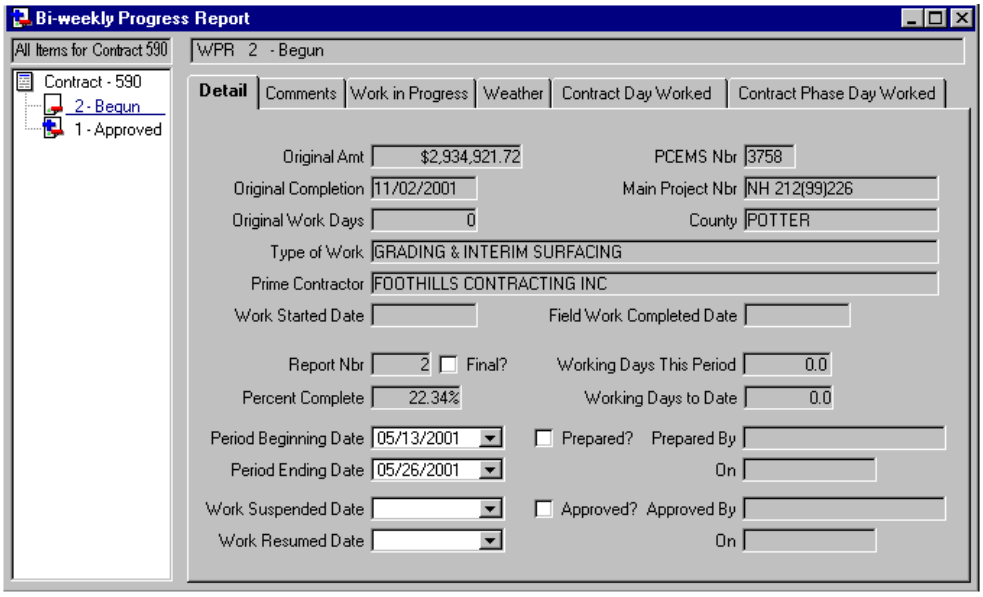
To create a biweekly progress report, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Biweekly Progress Report Button** .

   The Biweekly Progress Report Window displays below the Biweekly Progress Report Toolbar. When the window initially opens, all of the tabs contain information about the most recently saved biweekly progress report.

2. Click on the **Add Button** .

   A new, consecutively numbered biweekly progress report appears under the contract in the tree panel. A newly numbered Detail Tab appears in the list (right) panel as shown below.



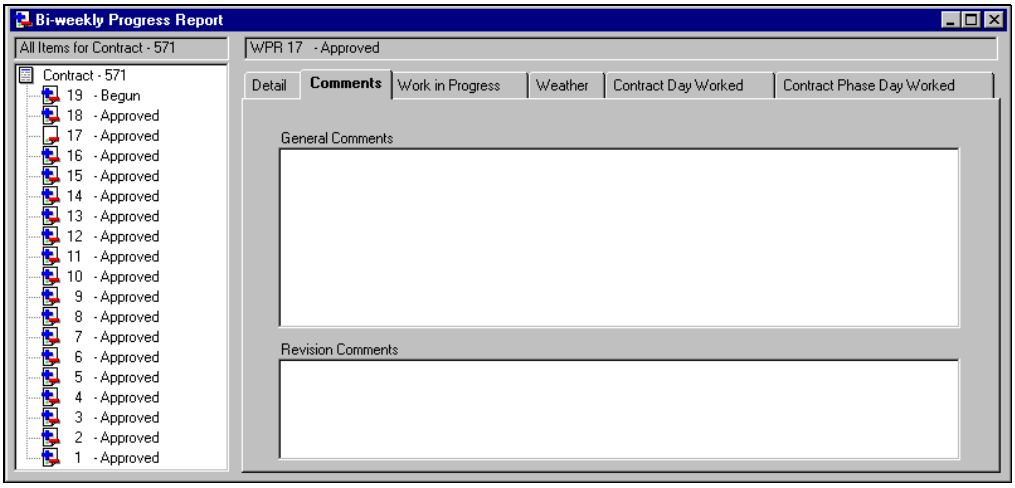
3. Mark the **Final?** checkbox next to the **Report Number** field if this is to be the last biweekly progress report.

4. Check the **Period Beginning Date** and **Period End Date** fields as filled automatically by CM&P. If necessary, edit them with their dropdown calendars.

5. Enter dates in the **Work Suspended Date** and/or **Work Resumed Date** fields as appropriate.

6. Click on the **Comments Tab**.

The Biweekly Progress Report Comments Tab appears as shown below.

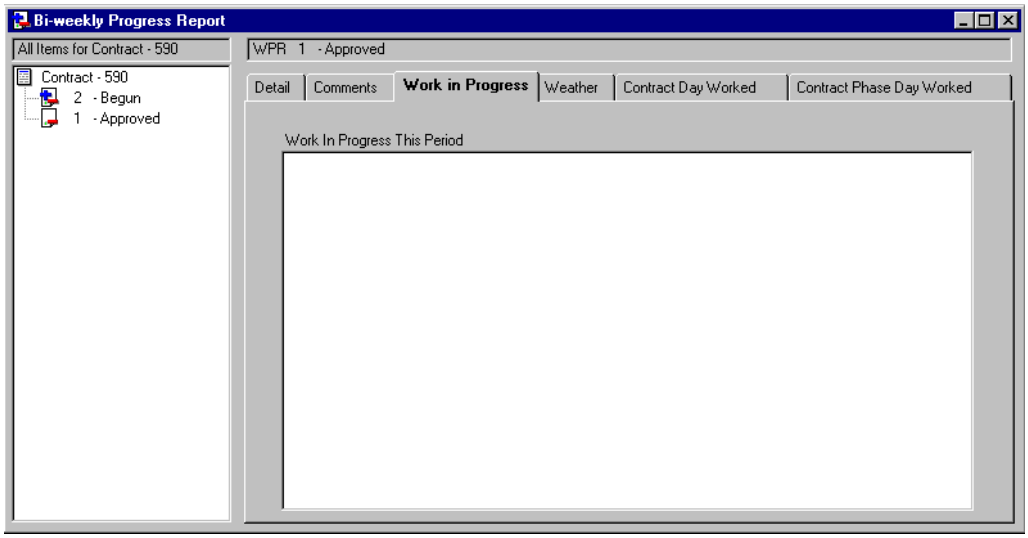


7. Enter general and revision comments as desired.

8. Click on the **Spelling Button** to verify the spelling of the information contained on the **Comments** tab if desired.

9. Click on the **Work in Progress Tab**.

   The Biweekly Progress Report Work in Progress Tab appears as shown below.

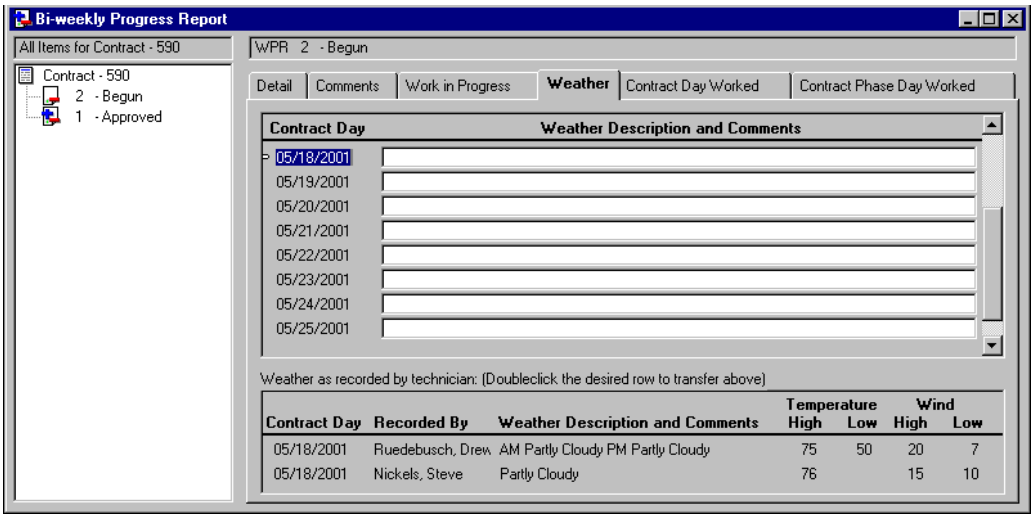


10. Enter a summary with specifics about the work, contractors, and subcontractors involved in the work currently being conducted.

11. Click on the **Spelling Button** to verify the spelling of the information contained on the **Work In Progress** tab if desired.

12. Click on the **Weather Tab**.

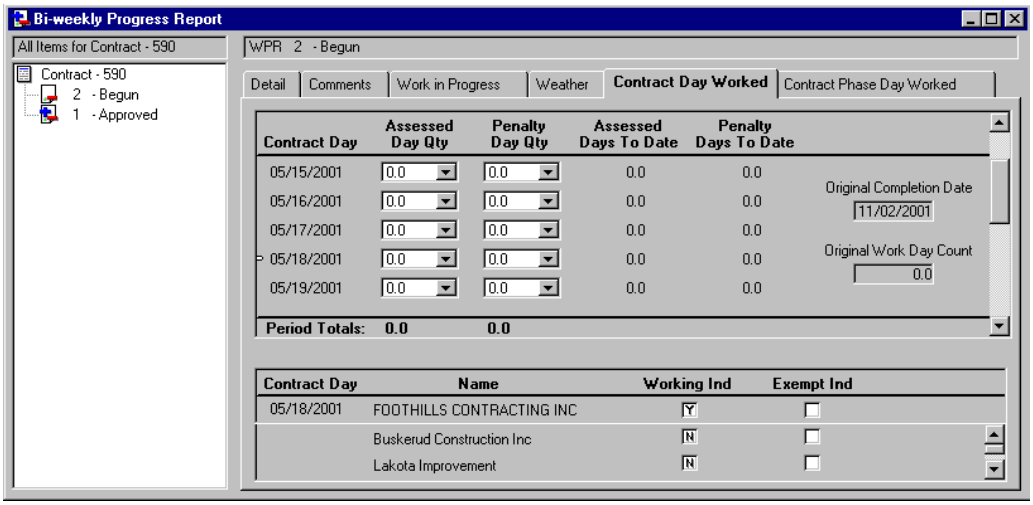
    The Biweekly Progress Report Weather Tab appears as shown below.



13. Use the recorders' information to complete the daily weather descriptions.

14. Click on the **Contract Day Worked Tab**.

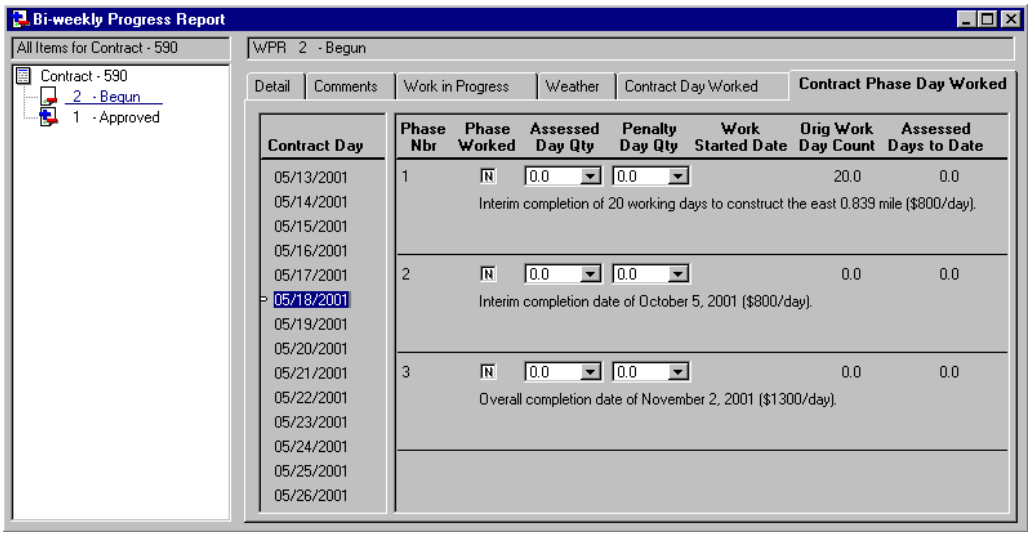
    The Biweekly Progress Report Contract Day Worked Tab appears as shown below.



15. Assess and/or penalize the contractor as appropriate for each contract day within this progress report.

16. If this contract has been divided into phases, click on the **Contract Phase Day Worked Tab**.

The Biweekly Progress Report Contract Phase Day Worked Tab appears as shown below.



17. Assess and/or penalize the contractor as appropriate for each contract phase day within this progress report.

> If this is a phase contract, the user should specify whether or not any phase work was done on each contract day. The valid entries are either **Y** or **N**.

18. When satisfied that the biweekly progress report is complete, mark the **Prepared?** checkbox on the **Detail Tab**.

19. The **Prepared By** and **On** fields are automatically filled.

20. Click on the **Save Button** .

21. Click on the **Close Button** .

> Changing the selected **Contract Day** date on any of these tabs--**Contract Day Worked Tab**, **Contract Phase Day Worked Tab**, or **Weather Tab**--will also change the selected day on the other two tabs.

Edit a Biweekly Progress Report

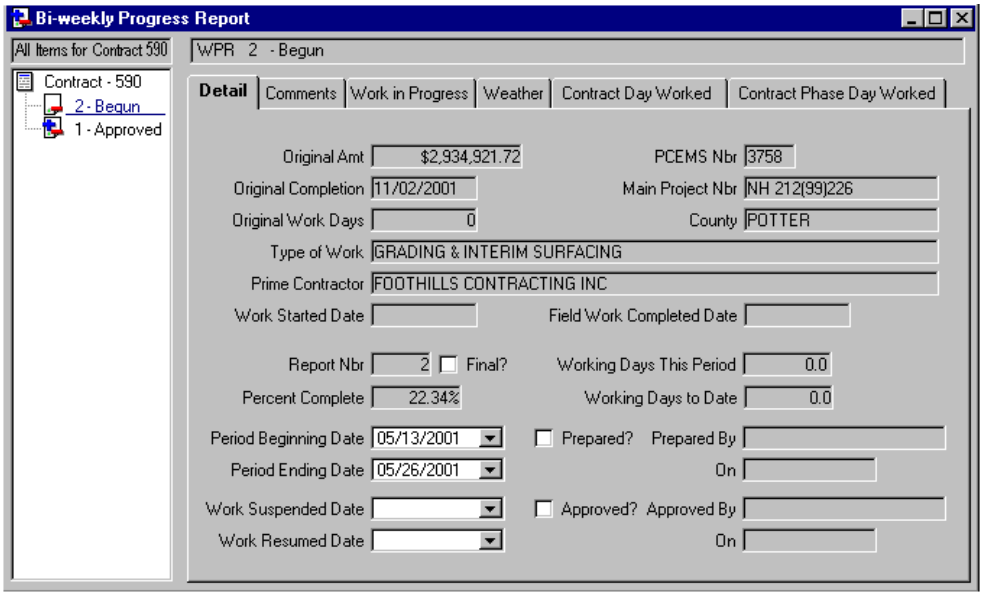
To edit a biweekly progress report, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Biweekly Progress Report Button** .

   The Biweekly Progress Report Window and toolbar appear.

2. Click on the desired **biweekly progress report** in the tree panel.

   The Biweekly Progress Report Window Detail Tab for the selected biweekly progress report is displayed as shown below.



3. Click on the appropriate tab(s), and edit the desired information. Refer to Create a Biweekly Progress Report for more specific information, if necessary.

4. Click on the **Spelling Button** to verify the spelling of the information contained on the **Comments** and **Work In Progress** tabs if desired.

> Changing the selected **Contract Day** date on any of these tabs--**Contract Day Worked Tab**, **Contract Phase Day Worked Tab**, or **Weather Tab**--will also change the selected day on the other two tabs.

5. Click on the **Save Button** .

6. Click on the **Close Button** .

Delete a Biweekly Progress Report

An approved WPR cannot be deleted.

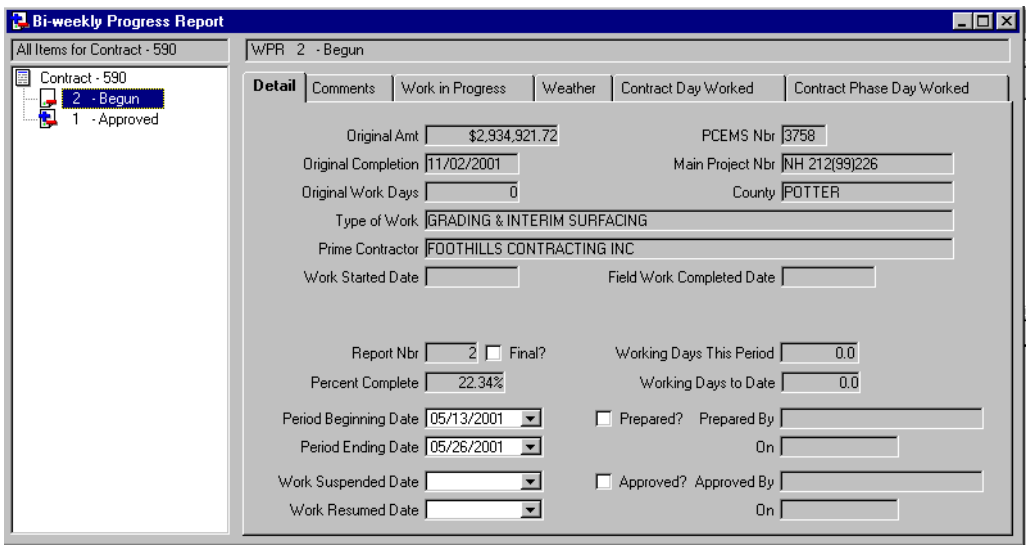
To delete a biweekly progress report, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Biweekly Progress Report Button**.

   The Biweekly Progress Report Window displays below the Biweekly Progress Report Toolbar. When the window initially opens, all of the tabs contain information about the most recently saved biweekly progress report.

2. Click on the desired **biweekly progress report** in the tree panel to delete.

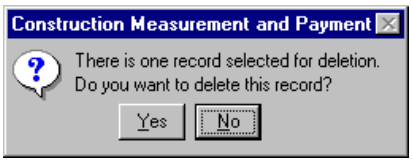
   The Biweekly Progress Report Window Detail tab for the selected biweekly progress report displays as shown below.



3. Verify that the appropriate biweekly progress report has been selected.

4. Click on the **Delete Button**.

CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** [No] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] enters the deletion command into the CM&P System.



5. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

6. Click on the **Save Button**.

   The deletion just made is now recorded.

7. Click on the **Close Button**.

Mark a Biweekly Progress Report as Prepared

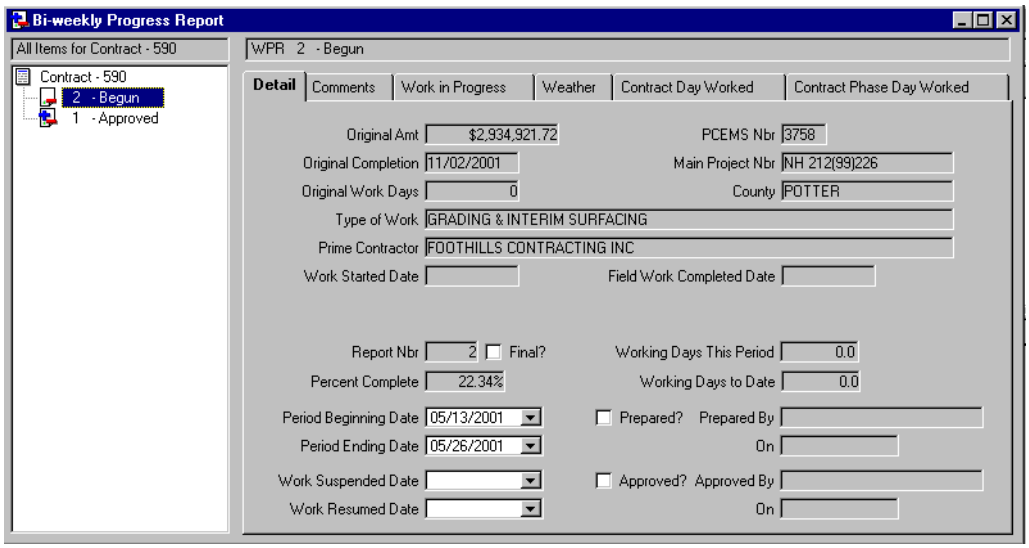
To mark a biweekly progress report as prepared, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Biweekly Progress Report Button** .

   The Biweekly Progress Report Window and toolbar appear.

2. Click on the desired **biweekly progress report** in the tree panel.

   The Biweekly Progress Report Window Detail tab for the selected biweekly progress report displays as shown below.



3. Click on the **Prepared?** checkbox.

   A checkmark appears in the checkbox. Information is also automatically entered in the **Prepared By**, and **On** fields to the right of the checked box.

4. Click on the **Save Button** .

5. Click on the **Close Button** .

Approve a Biweekly Progress Report

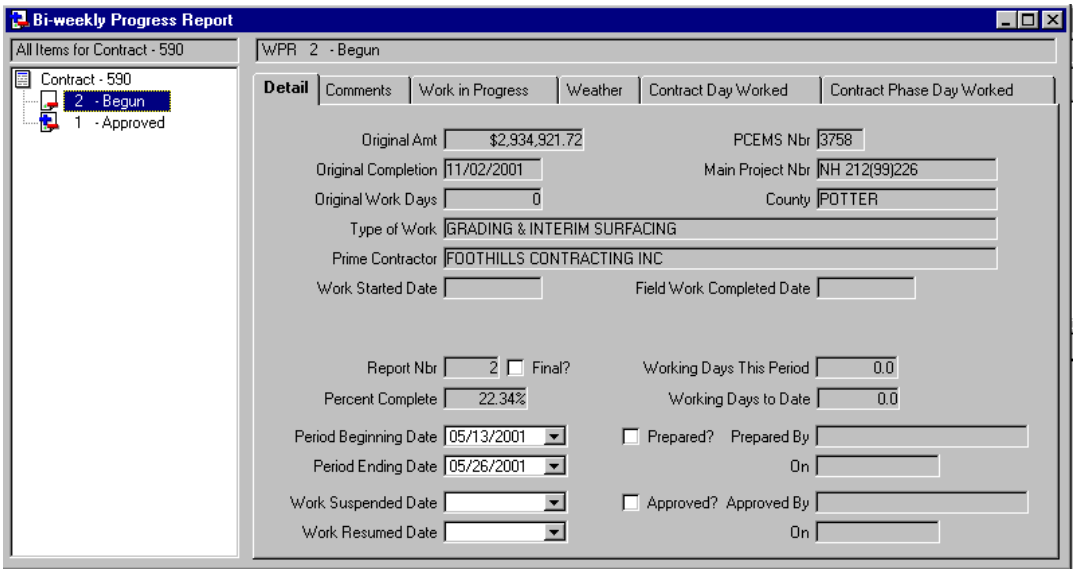
To approve a biweekly progress report, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Biweekly Progress Report Button** .

   The Biweekly Progress Report Window and toolbar appear.

2. Click on the desired **biweekly progress report** in the tree panel.

   The Biweekly Progress Report Window Detail tab for the selected biweekly progress report displays as shown below.



3. Click on the **Approved?** checkbox.

   A checkmark appears in the checkbox. Information is also automatically entered in the **Approved By**, and **On** fields to the right of the checked box.

4. Click on the **Save Button** .

5. Click on the **Close Button** .

15. Contract Weather Day

Contract Weather Day Window

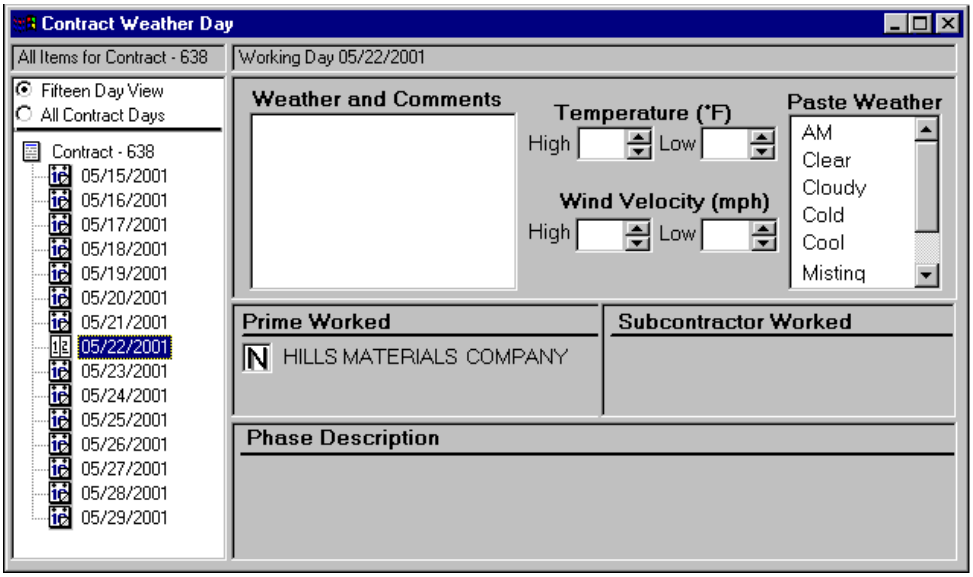
The Contract Weather Day Window is reached through the **Contract Weather Day Button** on the Frame bar Toolbar or through the menu path: **Goto, Contract Weather**. From this window, users can record information about who worked, which phase work was performed, and the weather. Using buttons on the Contract Weather Day Toolbar shown below, they can save contract weather day information or close the window.

The **Print Button**, when available, allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **Save Button** records all of the work performed since the last save command was performed. Users are encouraged to save information frequently to prevent losing data. Only saving changes or additions before closing the window will allow the changes to enter the CM&P System.

The **Help Button** allows users to retrieve help from the application's online help file. If the specific information required is not supplied immediately, try searching the Help Topics panel to the left of the main Help panel.

The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.



The **Weather and Comments** field allows users to enter information for the day highlighted in the tree panel. Users may type in this field, or select and paste in options from the **Paste Weather** field by double clicking on them.

Users may select to view only fifteen days at a time in the tree panel (with the **Fifteen Day View** radio button), or they may select to view every day within the contract period in the tree panel (with the **All Contract Days** radio button).

The specific contract days selected with the radio button choice above are displayed in the Contract Weather Day Window's tree panel. Once a day is selected (highlighted) in the tree panel, any information entered in the right-hand list panel is recorded for that day. (The information is not saved, however, until the **Save Button** is used.)

The **Paste Weather** field lists typical weather terms alphabetically for users to quickly select and paste into the **Weather and Comments** field, by double-clicking on the desired term.

Enter a value or use the arrow buttons to select a value for the **High Temperature** recorded for the day.

Enter a value or use the arrow buttons to select a value for the **Low Temperature** recorded for the day.

Enter a value or use the arrow buttons to select a value for the **High Wind Velocity** recorded for the day.

Enter a value or use the arrow buttons to select a value for the **Low Wind Velocity** recorded for the day.

The **Prime Worked** panel allows users to indicate by entering the appropriate character (or by clicking on the box to select the appropriate character) whether the prime contractor was working (**Y**), not working (**N**), or it is unknown whether work was performed or not (**?**).

The **Subcontractor Worked** panel allows users to indicate by entering the appropriate character (or by clicking on the box to select the appropriate character) whether each subcontractor listed was working (**Y**), not working (**N**), or it is unknown whether work was performed or not (**?**).

The **Phase Description** panel allows users to indicate by entering the appropriate character (or by clicking on the box to select the appropriate character) whether phase work was performed (**Y**), not performed (**N**), or it is unknown whether phase work was performed or not (**?**).

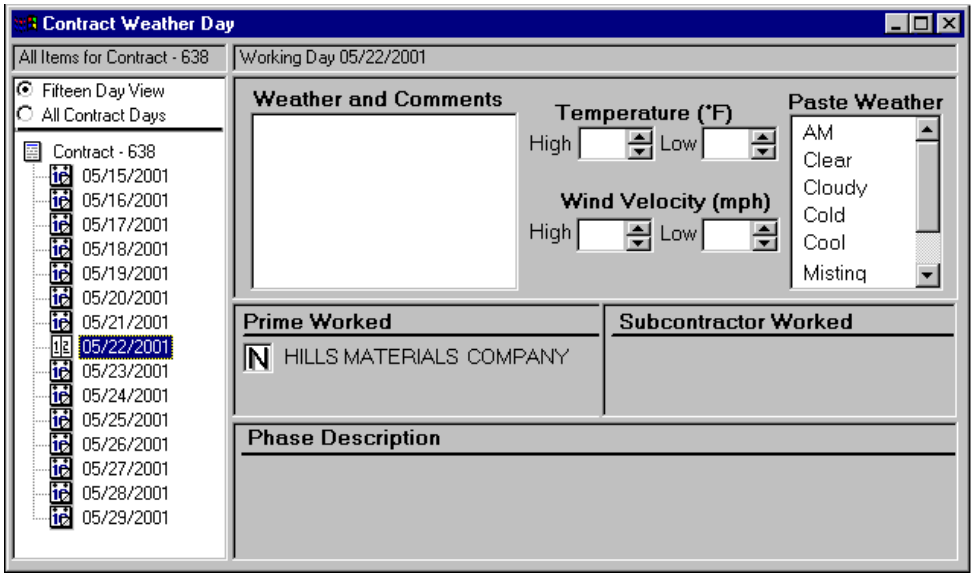
The title bar of the Contract Weather Day Window list panel displays the contract day selected (highlighted) in the tree panel. This allows users to double check which day's weather, contractor, and phase information they are entering.

Record Contract Weather Day Information

To record contract weather day information in the Contract Weather Day Window, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Weather Day Button** .

   The Contract Weather Day Window appears below the Contract Weather Day Toolbar as shown below.



2. Select between the radio button choices of **Fifteen Day View** or **All Contract Days** to limit or expand the number of days available.

3. Select (highlight) the desired **day** in the tree panel.

   The selected day's contract weather day information displays in the list panel.

4. Enter the appropriate information in the **Weather and Comments** field.

   OR

   Select words from the **Paste Weather** field's alphabetical listing and double click them into the **Weather and Comments** field.

5. Enter the appropriate temperatures in the **High** and **Low Temperature** fields.

   OR

   Use the **Up** and/or **Down Arrow Buttons** to select the appropriate temperatures in the **High** and **Low Temperature** fields.

6. Click on the **Save Button** .

7. To record information for another contract day at this time, click on the desired day in the tree panel and repeat steps 4-6.

8. Refer to Record Contractor and Subcontract Working Day Information and/or Record Phase Day Working Information if desired at this time.

9. Click on the **Close Button** .

Record Contractor and Subcontractor Working Day Information

To record contractor and subcontractor working day information in the Contract Weather Day Window, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Weather Day Button** .

   The Contract Weather Day Window appears below the Contract Weather Day Toolbar.

2. Select between the radio button choices of **Fifteen Day View** or **All Contract Days** to limit or expand the number of days available.

3. Select (highlight) the desired **day** in the tree panel.

   The selected day's contract working day information displays in the list panel as shown below.

4. Enter the appropriate character in each **Contractors Working** box.

   OR

   Click on each **Contractors Working** box until the appropriate character appears.

> **N** indicates the (sub)contractor was not working. **Y** indicates that the (sub)contractor was working. **?** indicates that whether the (sub)contractor was working or not is unknown.

5. Enter the appropriate character in each **Subcontractors Working** box.

   OR

   Click on each **Subcontractors Working** box until the appropriate character appears.

6. Click on the **Save Button** .

7. To record information for another contract day at this time, click on the desired day in the tree panel and repeat steps 4-6.

8. Refer to Record Contract Weather Day Information and/or Record Phase Day Working Information if desired at this time.

9. Click on the **Close Button** .

Record Phase Day Working Information

To record phase day working information in the Contract Weather Day Window, perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Contract Weather Day Button** .

   The Contract Weather Day Window appears below the Contract Weather Day Toolbar.

2. Select between the radio button choices of **Fifteen Day View** or **All Contract Days** to limit or expand the number of days available.

3. Select (highlight) the desired **day** in the tree panel.

   The selected day's contract working day information displays in the list panel as shown below.

4. If appropriate to the contract, enter the appropriate character in each **Contract Phase** box.

   OR

   Click on each **Contract Phase** box until the appropriate character appears.

> **N** indicates the phase was not in progress. **Y** indicates that the phase was in progress. **?** indicates that whether the phase was in progress or not is unknown.

5. Click on the **Save Button** .

6. To record information for another contract day at this time, click on the desired day in the tree panel and repeat steps 4-5.

7. Refer to Record Contractor and Subcontract Working Day Information and/or Record Contract Weather Day Information if desired at this time.

8. Click on the **Close Button** .

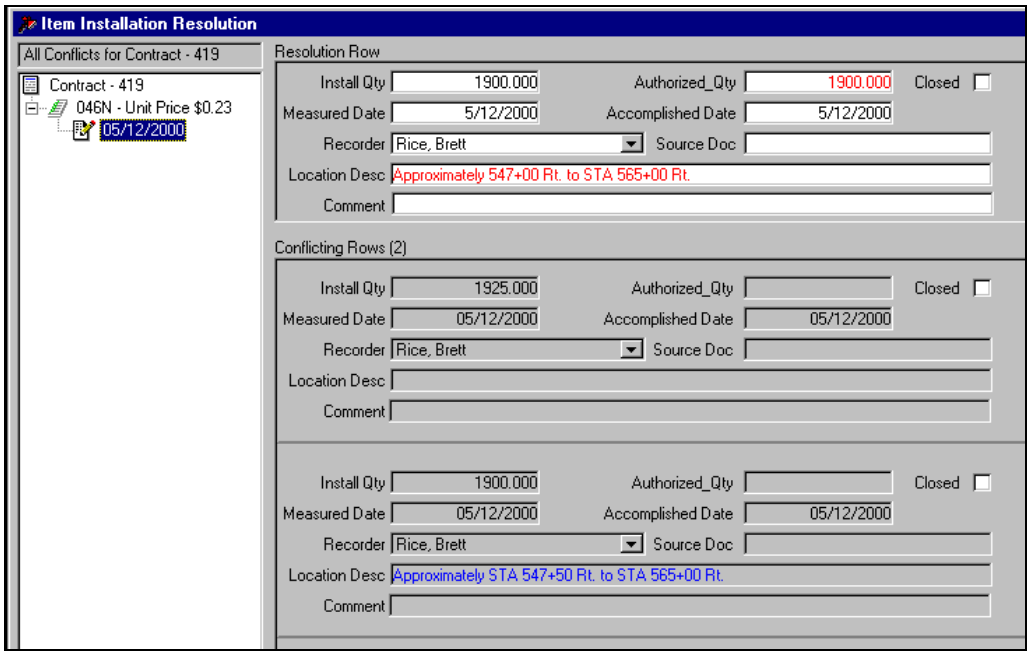
16. Contract Conflict

Contract Conflict Resolution

When field recorders replicate their information, the information is first compared with existing parameters for each item installation characteristic being saved. If a conflict exists between information the field recorder submits and information that exists in the system database, the conflict is set aside for review and resolution. To resolve a contract conflict, perform the following steps:

1. From the CM&P Frame Toolbar, click on the **Conflicts Button** .

   The Item Installation Resolution Window appears as shown below.



2. Highlight the conflicting item that is correct and click on the **Resolve Button** .

17. Visual Inspection

Visual Inspection Window

The Visual Inspection Window is reached through the **Visual Inspection Button** on the Frame bar Toolbar or through the menu path: **Goto**, **Visual Inspection**. From this window, users can create, edit, delete, approve, or add an additional visual inspection. Using buttons on the Visual Inspection Toolbar shown below, they can add or delete visual inspections.

The **Print Button** allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **Add Button** clears-- it does not delete-- the information in the currently active window and allows users to enter information about a new item.

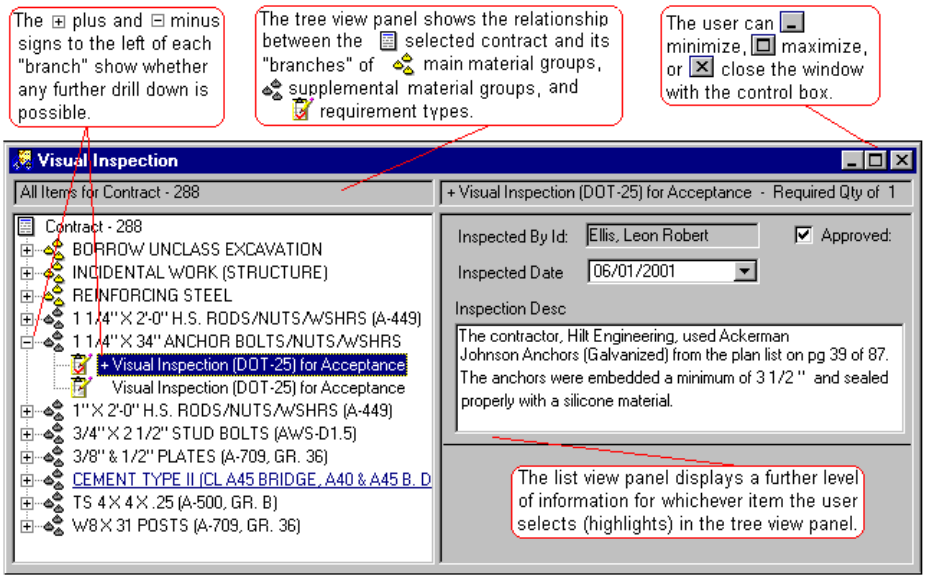
The **Delete Button** allows users to permanently remove information, deleting the data displayed in the window.

The **Save Button** records all of the work performed since the last save command was performed. Users are encouraged to save information frequently to prevent losing data. Only saving changes or additions before closing the window will allow the changes to enter the CM&P System.

The **Help Button** allows users to retrieve help from the application's online help file. If the specific information required is not supplied immediately, try searching the Help Topics panel to the left of the main Help panel.

The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.

Once a visual inspection in the tree panel is selected, the Visual Inspection Window displays as shown in the drilled down and annotated example below.

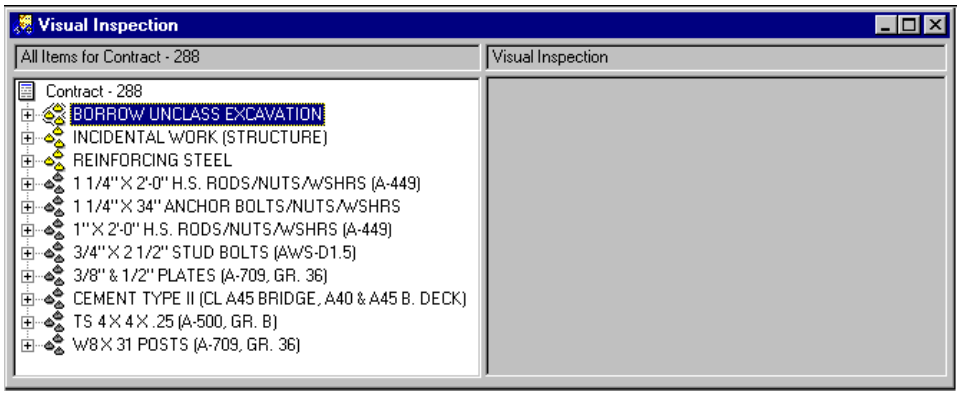


Create a Visual Inspection

To create a visual inspection (DOT 25), perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Create a Visual Inspection Button** .

   The Visual Inspection Window displays below the Visual Inspection Toolbar as shown below.



2. Click on the **plus sign** to the left of the desired material group.

   OR double click on the desired **material group**.

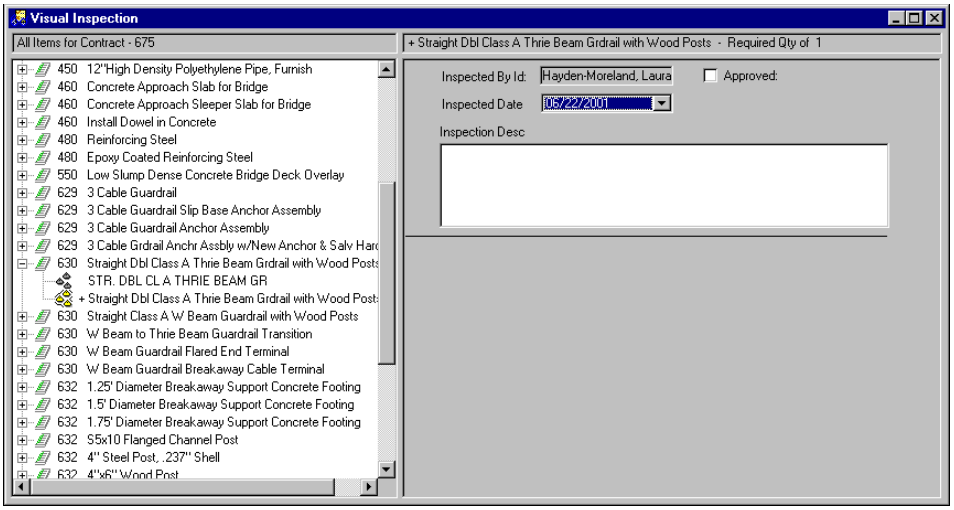
   The visual inspection requirement type(s) for the material group display.

3. Click on the desired **visual inspection requirement type**.

   The visual inspections already entered for the selected requirement type display in the list panel. If no visual inspections have been entered, the panel displays blank.

4. Click on the **Add Button** .

A new visual inspection displays at the top of the list panel as shown below.



5. Select the appropriate date from the **Inspected Date** field's drop-down list.

6. Enter a description of the new visual inspection in the **Inspection Description** field.

7. Click on the **Save Button** .

8. Click on the **Close Button** .

Edit a Visual Inspection

To edit a visual inspection (DOT 25), perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Create a Visual Inspection Button** .

   The Visual Inspection Window displays below the Visual Inspection Toolbar.

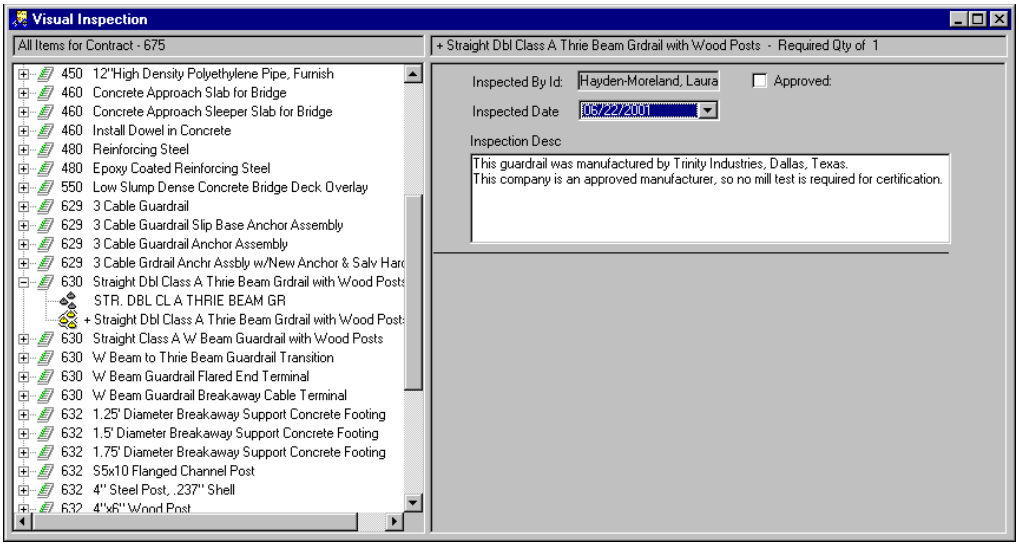
2. Click on the **plus sign** to the left of the desired material group.

   OR double click on the desired **material group**.

   The visual inspection requirement type(s) for the material group display.

3. Click on the desired **visual inspection requirement type**.

   The visual inspections already entered for the selected requirement type display in the list panel as shown below.



4. Locate the desired **visual inspection** for editing.

5. Edit the desired **information** in the visual inspection.

6. Click on the **Save Button** .

7. Click on the **Close Button** .

Delete a Visual Inspection

To delete a visual inspection (DOT 25), perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Create a Visual Inspection Button** .

   The Visual Inspection Window displays below the Visual Inspection Toolbar.

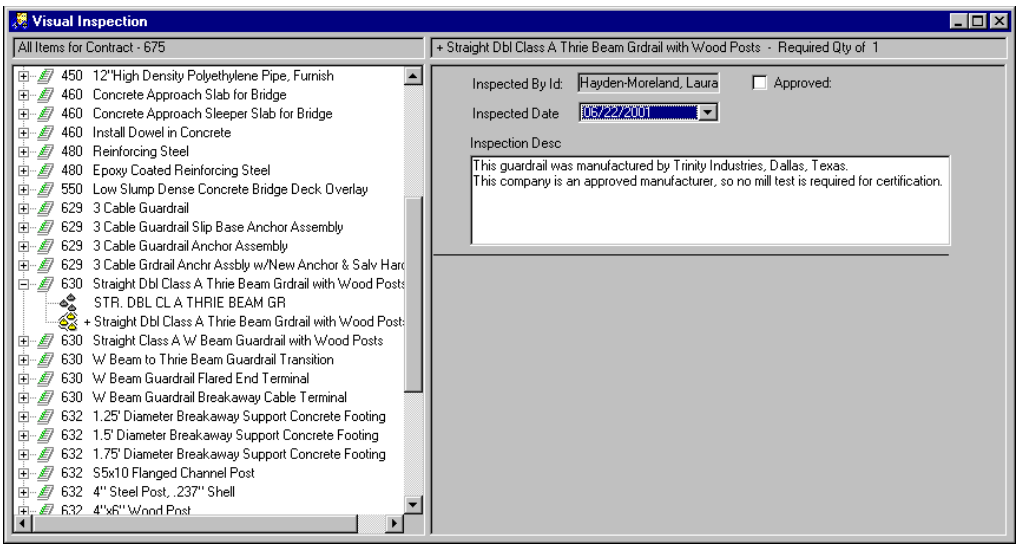
2. Click on the **plus sign** to the left of the desired material group.

   OR double click on the desired **material group**.

   The visual inspection requirement type(s) for the material group display.

3. Click on the desired **visual inspection requirement type**.

   The visual inspections already entered for the selected requirement type display in the list panel as shown below.

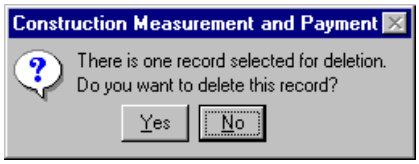


4. Locate the desired **visual inspection** for deletion.

5. Verify that this is the desired contract issue to delete.

6. Click on the **Delete Button** above the window.

CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** enters the deletion command into the CM&P System.



7. Click on the **Yes Button** Yes.

> At this point, the information has not yet been deleted. The **Save Button** must be used after clicking on the **Yes Button** Yes to save the information as deleted.

8. Click on the **Save Button**.

   The deletion just made is now recorded.

9. Click on the **Close Button**.

Add an Additional Visual Inspection

To add an additional visual inspection (DOT 25), perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Create a Visual Inspection Button** .

   The Visual Inspection Window displays below the Visual Inspection Toolbar.

2. Click on the **plus sign** to the left of the desired material group.

OR

   Double click on the desired **material group**.

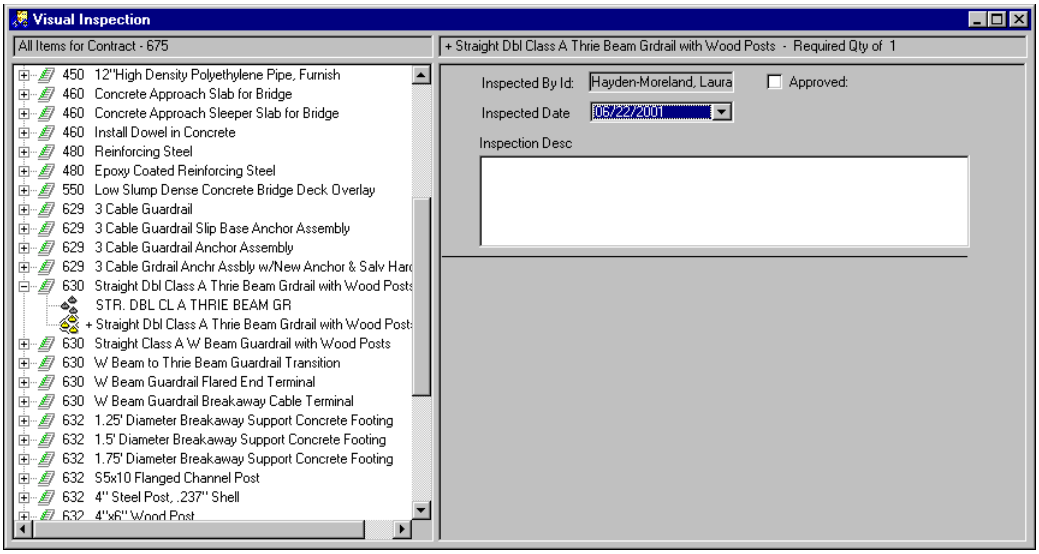
   The visual inspection requirement type(s) for the material group display.

3. Click on the desired **visual inspection requirement type**.

   The visual inspections already entered for the selected requirement type display in the list panel. If no visual inspections have been entered, the panel displays blank.

4. Click on the **Add Button** .

   A new visual inspection displays at the top of the list panel as shown below.



5. Select the appropriate date from the **Inspected Date** field's drop-down list.

6. Enter a description of the new visual inspection in the **Inspection Description** field.

7. Click on the **Save Button** .

8. Repeat steps 4-7 as desired for additional visual inspections of the same requirement type for the same material group.

9. Click on the **Close Button** .

Approve a Visual Inspection

To approve a visual inspection (DOT 25), perform the following steps.

1. From the CM&P Frame Toolbar, click on the **Create a Visual Inspection Button** .

   The Visual Inspection Window displays below the Visual Inspection Toolbar.

2. Click on the **plus sign** to the left of the desired material group.

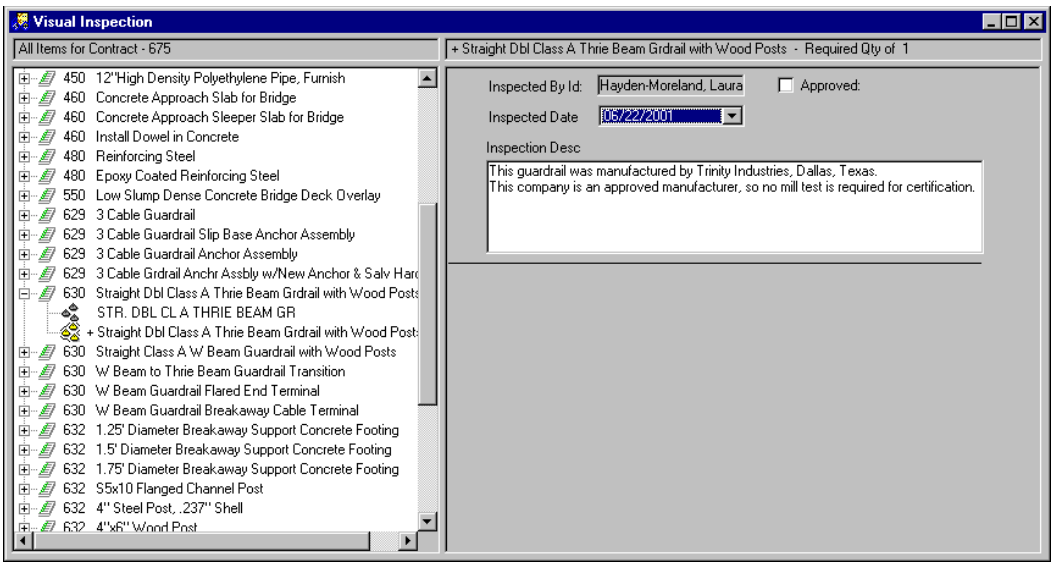
   OR

   Double click on the desired **material group**.

   The visual inspection requirement type(s) for the material group display.

3. Click on the desired **visual inspection requirement type**.

   The visual inspections already entered for the selected requirement type display in the list panel as shown below.



4. Locate the desired **visual inspection** for approval.

5. Click on the **Approved checkbox** to display a checkmark in it.

6. Click on the **Save Button** .

7. Click on the **Close Button** .

18. Final a Contract

Two tasks must be performed before finaling a contract, the final CCO and the final pay estimate. To ensure that these go smoothly, it is helpful to view the Final CCO Report and the Close Contract Report.

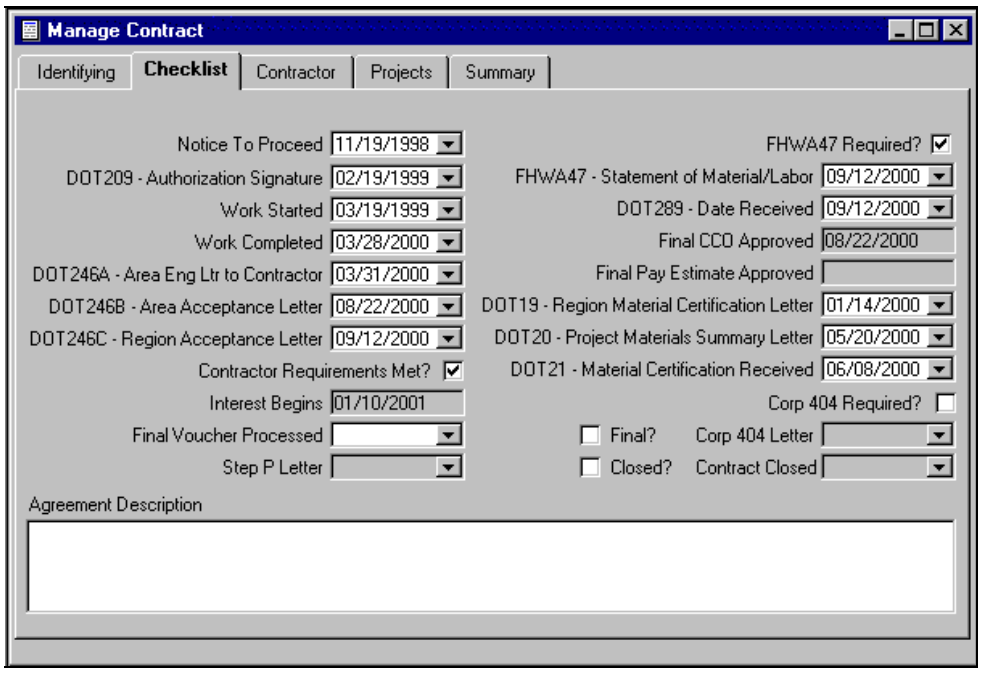
After creating a final CCO and a final pay estimate, perform the following steps to final the contract.

1. From the CM&P Frame Toolbar, click on the **Manage Contract Button** .

   The Manage Contract Window's Identifying Tab appears below the Manage Contract Toolbar.

2. Click on the **Checklist Tab**.

   The Manage Contract Window's Checklist Tab appears as shown below.



3. Click on the **Final?** checkbox.

   A checkmark now appears in the checkbox.

4. Click on the **Save Button** .

5. Click on the **Close Window Button** .

19. Reports

Generate a Report

To generate and view or print a report, select the appropriate report from the Reports menu item, and (if necessary) supply the report parameters. The reports that are available to users in the CM&P System are automatically generated by the application. Other than setting the parameters in the specific report parameters window, users do not have to input or extract any information to compile the data for each report. The Reports Toolbar (shown below) appears below the Frame Window Toolbar to aid users in viewing report information of interest to them.

The **Print Button** allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **Parms Button** allows users to enter different parameters for generating a new report of the same type. By using this button, users can often view reports for contracts other than the one currently open.

The **First Button** allows users to return to the first page of the current report.

The **Previous Button** allows users to return to the page immediately preceding the currently viewed page of the report.

The **Next Button** allows users to move forward to the page immediately following the currently viewed page of the report.

The **Last Button** allows users to move forward to the final page of the current report.

The **Filter Button** enables users to arrange information according to desired parameters. For instance, a window that consists of five columns can be filtered for only the desired information.

The **Sort Button** allows users to view information sorted and arranged according to the desired parameter(s), for example alphabetical, numerical, or some other order.

The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.

Reports can be viewed on screen and do not have to be printed. Printing should be reserved for times when a paper copy is needed.

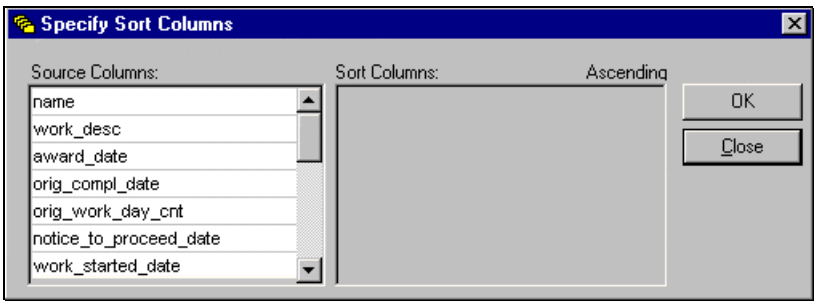
Sort Report Information

Report information can only be sorted if the **Sort Button** is available. To sort the information presented in a report, perform the following steps:

1. Navigate through the Menu bar's **Reports** menu item and its dropdown menus, selecting and generating the report desired.

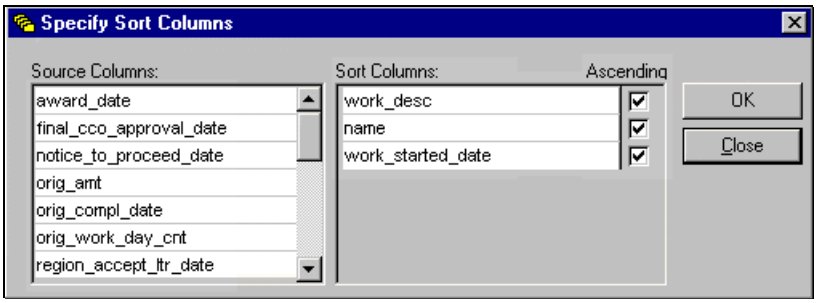
2. Click on the **Sort Button** on the Report Toolbar.

   The Specify Sort Columns Window appears as shown below. Source columns are listed on the left. Sort columns will be selected on the right.



3. Select the column to sort by. Click on the desired selection and drag it into the sort columns panel on the right.

4. An **Ascending** checkbox will appear next to the chosen sort column as shown below. If this is left checked, the reordering of the report information will proceed alphabetically or numerically according to entries in the column selected. If the **Ascending** checkbox is deselected, the reordering of the report information will begin with "z" entries or the highest number in the column selected.



5. Click on the **OK Button** OK.

   The report information is reordered according to the sort specified.

> Users can resort the same report with different criteria by repeating step 2, dragging back their original sort columns choice, then completing steps 3-5.

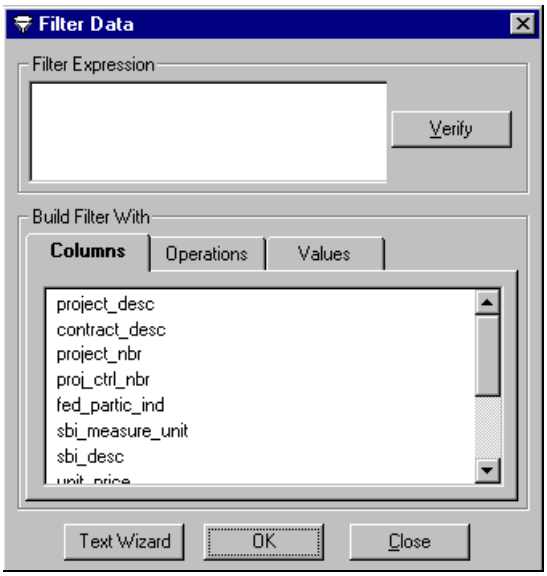
Filter Report Information

Report information can only be filtered if the **Filter Button** is available. To filter the information presented in a report, perform the following steps:

1. Navigate through the Menu bar's **Reports** menu item and its dropdown menus, selecting and generating the report desired.

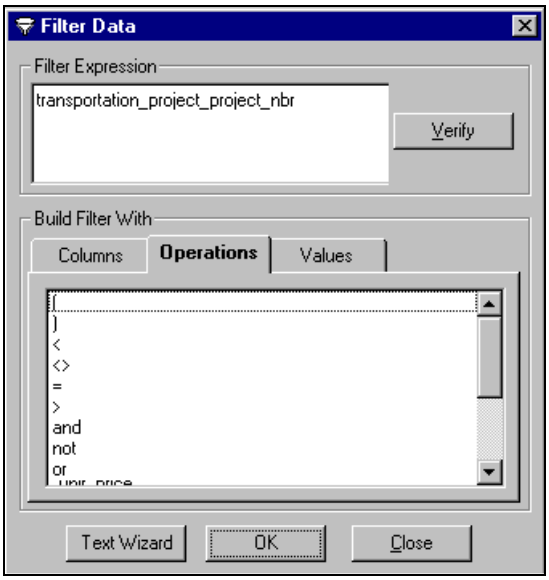
2. Click on the **Filter Button** on the Report Toolbar.

   The Filter Data Window appears as shown below.



3. For a numerical or alphabetical filter, select the first part of the filter expression from the **Columns Tab** and click on the **Operations Tab**. (For a word specific filter, refer to the instructions for the Text Wizard.)

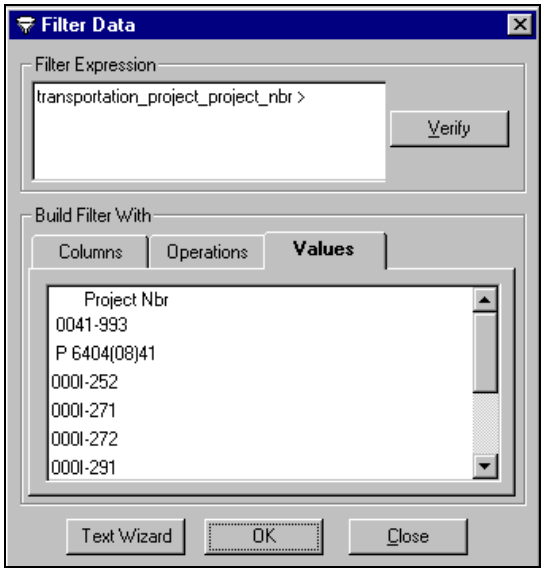
The **Operations Tab** appears as shown below. The operations available are always for a logical search.



4. Select the operation to perform upon the data found in the field specified from the **Columns Tab**, double click it into the filter expression panel above, and click on the **Values Tab**.

Users may return to the **Operations Tab** after establishing a value for the filter expression to expand the size of the filter expression by adding further operations to be performed, using **and**, **not**, or **or**.

The **Values Tab** appears as shown below. Values appropriate to the field chosen from the **Columns Tab** are displayed. A choice of any column field containing numbers or amounts will result in an offering of values, numbers, or amounts specific to the contract selected. Other column fields require textual values.



5. Select a value to complete the filter expression and double click it into the filter expression panel above.

6. Verify that the expression is valid by clicking on the **Verify Button** Verify.

> If CM&P indicates that the filter expression is invalid, repeat and correct steps 3-5.

7. To generate a filtered report with the valid filter expression, click on the **OK Button** OK.

> Users can re-filter the same report with different criteria by repeating steps 2-7.

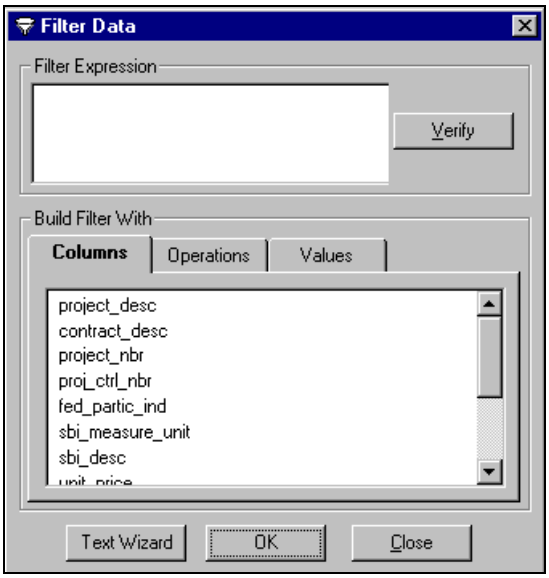
Text Wizard in Filter Report Information

A **Text Wizard Button** is available in the Filter Data Window, allowing users to filter reports for specific words, letters, or numbers in a particular column. To filter data for report generation using the Text Wizard, perform the following steps.

1. Navigate through the Menu bar's **Reports** menu item and its dropdown menus, selecting and generating the report desired.

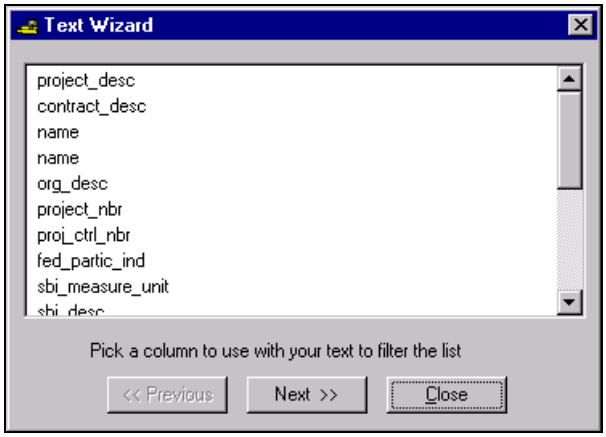
2. Click on the **Filter Button** .

   The Filter Data Window appears as shown below.



3. Click on the **Text Wizard Button** .

The Text Wizard Window appears as shown below.



4. Select (highlight) a column by which to filter the displayed report information.

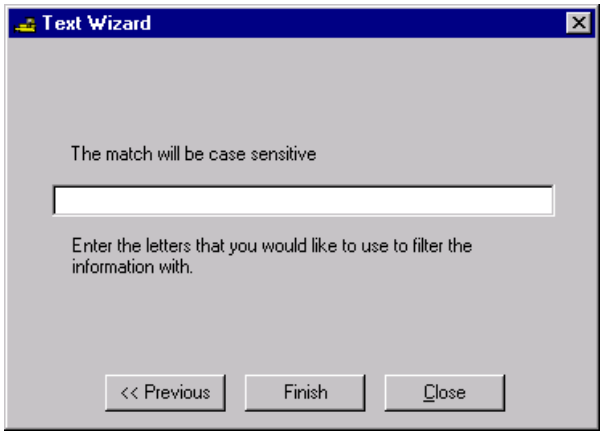
5. Click on the **Next Button** Next >>.

   The next Text Wizard Window appears as shown below.

6. Select the radio button appropriate to the type of matching desired for filtering the data (**Starts with, Ends With,** or **Contains**).

7. Click on the **Next Button** Next >>.

The final Text Wizard Window appears as shown below.

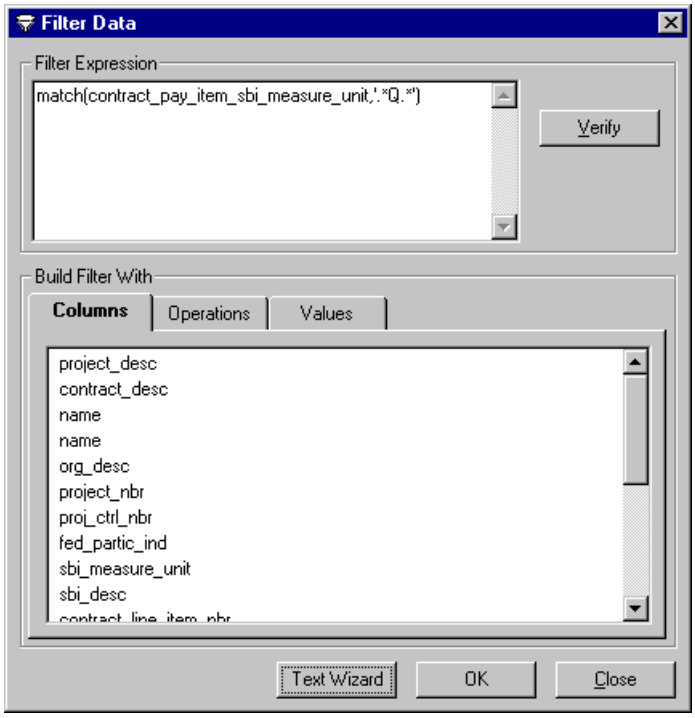


8. In the field provided, type the words, parts of words, letters, or numerals that must (according to your previous choice) begin, end, or be contained in the text recorded in the column the data is to be filtered by.

> This field is case sensitive, if the words or letters are upper case or capitalized in the report, they must be entered as upper case here.

9. Click on the **Finish Button** Finish to return to the Filter Data Window.

   The Filter Data Window appears with the filter expression created by the Text Wizard already in the upper panel as shown below.



10. Verify that the expression is valid by clicking on the **Verify Button** [Verify].

11. To generate a new report with the filter expression, click on the **OK Button** [OK].

Users can filter the same report again using different criteria by repeating steps 2-11.

Manage Contract Reports

Contract Detail Report

The Contract Detail Report is reached through the menu path: **Reports, Manage Contract, Contract Detail**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists the contract number, type of work, contractor, dates from the Manage Contract Window tabs, original contract amount, final estimate amount, net increase, liquidated damages, and royalty deductions. The report opens directly for the currently selected contract as shown below. Clicking on the **Report Parameters Button** allows users to select any contract's Contract Detail Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

05/30/2001 **South Dakota Department of Transportation** Page 1 of 1

Contract No. 638 in the Custer Area

Type of Work GRAVEL STOCKPILE AT EDGEMONT EAST MAINTENANCE YARD
Contractor HILLS MATERIALS COMPANY

Awarded	12/15/2000	**Original Completion Time**	05/26/2001
Notice to Proceed	12/15/2000	**No. of Working Days Used**	0.0
Work Started	02/20/2001	**Original Contract Amount**	$31,850.00
Work Completed	03/23/2001	**Final Estimate Amount**	$31,856.35
Acceptance Letter	03/29/2001	**Net Increase**	$0.00
Final CCO Approved		**Liquidated Damages**	$0.00
		Royalty Deduct	$0.00

Line #	Item Description	Unit	Unit Price	Orig Qty	Contract Qty	Auth Qty	Paid Qty
001N	Mobilization	LS	1.000	100.000	100.000	0.000	100.000
002N	Crushed Aggregate Modified	Ton	6.350	5,000.000	5,000.000	5,001.000	5,001.000

Total Calculated Contract Amount: $31,850.00

Distribution to Date (by Project):

PCEMS No.	Project No.	County	Participating To FHWA	Non-Participating	Total
I209	34972G		$0.00	$31,756.37	$31,756.37

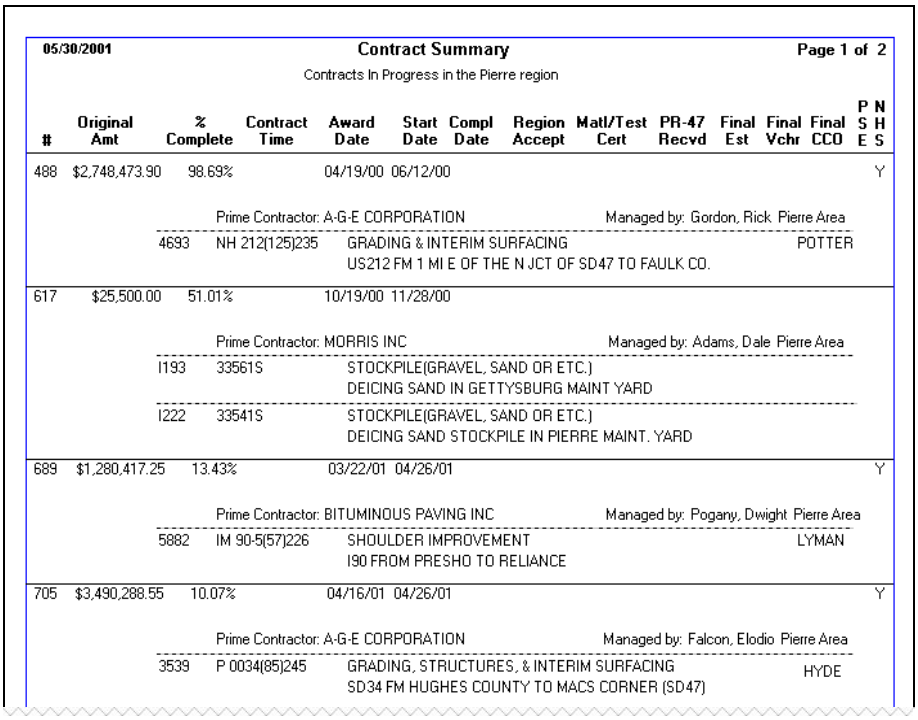
Contract Summary Report

The Contract Summary Report is reached through the menu path: **Reports, Manage Contract, Contract Summary**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides overview information about the specified contract(s). The report opens with the Contract Issue Report Parameters Window, allowing users to specify the status, contractors, and/or regions of contracts to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Contract Summary Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

If users do not specify a contractor — by leaving the **Contractor** field blank — the report will show all of the contractors.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.



05/30/2001 **Contract Summary** Page 1 of 2

Contracts In Progress in the Pierre region

#	Original Amt	% Complete	Contract Time	Award Date	Start Date	Compl Date	Region Accept	Matl/Test Cert	PR-47 Recvd	Final Est	Final Vchr	Final CCO	PSE	NHS
488	$2,748,473.90	98.69%		04/19/00	06/12/00									Y
			Prime Contractor: A-G-E CORPORATION					Managed by: Gordon, Rick Pierre Area						
		4693	NH 212(125)235	GRADING & INTERIM SURFACING US212 FM 1 MI E OF THE N JCT OF SD47 TO FAULK CO.								POTTER		
617	$25,500.00	51.01%		10/19/00	11/28/00									
			Prime Contractor: MORRIS INC					Managed by: Adams, Dale Pierre Area						
		I193	33561S	STOCKPILE(GRAVEL, SAND OR ETC.) DEICING SAND IN GETTYSBURG MAINT YARD										
		I222	33541S	STOCKPILE(GRAVEL, SAND OR ETC.) DEICING SAND STOCKPILE IN PIERRE MAINT. YARD										
689	$1,280,417.25	13.43%		03/22/01	04/26/01									Y
			Prime Contractor: BITUMINOUS PAVING INC					Managed by: Pogany, Dwight Pierre Area						
		5882	IM 90-5(57)226	SHOULDER IMPROVEMENT I90 FROM PRESHO TO RELIANCE								LYMAN		
705	$3,490,288.55	10.07%		04/16/01	04/26/01									Y
			Prime Contractor: A-G-E CORPORATION					Managed by: Falcon, Elodio Pierre Area						
		3539	P 0034(85)245	GRADING, STRUCTURES, & INTERIM SURFACING SD34 FM HUGHES COUNTY TO MACS CORNER (SD47)								HYDE		

Req for Final Pay (DOT-224) Report

The Request for Final Pay Report is reached through the menu path: **Reports, Manage Contract, Req For Final Pay (DOT-224)**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report, which is addressed to the Division of Finance (upper left corner), contains summary information about the selected contract (e.g., key dates, PCEMS No., project number, financial totals). The report opens directly from the currently selected contract as shown below. Clicking on the **Report Parameters Button** allows users to select another Request for Final Pay Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

DOT-224 **South Dakota Department of Transportation**

To: Division of Finance
Department of Transportation
700 Broadway Ave East
Pierre, South Dakota 57501

Contract No. 638 in the Custer Area
05/30/2001

The Final Estimate of HILLS MATERIALS COMPANY is herewith submitted to be presented for payment.

Type of Work GRAVEL STOCKPILE AT EDGEMONT EAST MAINTENANCE YARD

Awarded	12/15/2000	**Original Completion Time**	05/26/2001	
Notice to Proceed	12/15/2000	**No. of Working Days Used**	0.0	
Work Started	02/20/2001	**Original Contract Amount**	$31,850.00	
Work Completed	03/23/2001	**Final Estimate Amount**	$31,856.35	(+/- 6.35)
Acceptance Letter	03/29/2001	**Net Increase**	$0.00	
Final CCO Approved		**Liquidated Damages**	$0.00	
		Royalty Deduct	$0.00	

Distribution to Date (by Project):

PCEMS No.	Project No.	County	Participating To FHWA	Non-Participating	Total
I209	34972G		$0.00	$31,756.37	$31,756.37

Time Extension by State Transportation Commission:

Date and/or Days FHWA Approval Date

Submitted by _____
Custer Area Engineer

Close Contract Report

The Close Contract Report is reached through the menu path: **Reports, Manage Contract, Close Contract**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists open WPR's, open Work Authorizations, and open Issues, as well as any required items missing from the Manage Contract Window's **Checklist Tab**. This report is useful to reference when users are in the process of closing a contract. The report opens directly from the currently selected contract as shown below.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

5/30/2001 **Close Contract Report** Page 1 of 1

Contract	PCEMS	Main Project Nbr	Region Name	Area Name	Original Amt
638	I209	34972G	Rapid City Region	Custer Area	$31,850.00

Open or Missing Items

DOT 209 - Authorization Signature Date is Missing
DOT 246A - Area Engineer Letter to Contractor Date is Missing
DOT 19 - Region Material Certification Letter Date is Missing
DOT 20 - Project Materials Summary Letter Date is Missing
DOT 21 - Material Certification Received Date is Missing

Contract Letting Report

The Contract Letting Report is reached through the menu path: **Reports, Manage Contract, Contract Letting**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides information about the specified contract(s). The report opens with the Contract Letting Report Parameters Window, allowing users to specify the letting date of contracts to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Contract Letting Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

CMS Contract: 737 May 16, 2001 Letting 05/30/2001
Page 1 of 2

Copy of contract for GRADE, ASPH CONC RESURF, STRUCTURE EXTENSION
Project Nos. PH 2016(12)68, PCEMS 6042, PENNINGTON County, Length 0.294 Miles

Contract Awarded To: HILLS MATERIALS COMPANY
RAPID CITY , SD

Awarded On: May 24, 2001

Time of Completion: On or Before: 10/05/2001

Item No	Approx. Quantity	Item Description	Measurement Unit	Unit Bid	Amount
001P	18,000.000	Mobilization	LS	$1.00	$18,000.00
002P	100.000	Remove Silt Fence	Ft	$1.00	$100.00
003P	1,903.000	Unclassified Excavation	CuYd	$5.00	$9,515.00
004P	157.000	Contractor Furnished Borrow	CuYd	$11.00	$1,727.00
005P	5,000.000	Incidental Work	LS	$1.00	$5,000.00
006P	7,569.000	Cold Milling Asphalt Concrete	SqYd	$1.20	$9,082.80
007P	10.000	18" RCP Class 2, Furnish	Ft	$13.00	$130.00
008P	10.000	18" RCP, Install	Ft	$15.00	$150.00
009P	13.000	6" PVC Water Main	Ft	$15.00	$195.00
010P	3.000	Adjust Water Valve Box	Each	$50.00	$150.00
011P	1.000	Remove and Reset Fire Hydrant	Each	$750.00	$750.00
012P	13.000	Pavement Marking Paint, White	Gal	$23.00	$299.00
013P	30.000	Pavement Marking Paint, Yellow	Gal	$23.00	$690.00
014P	4.000	Pavement Marking Paint, Arrow	Each	$21.00	$84.00
015P	2.000	Pavement Marking Paint, Message	Word	$21.00	$42.00

Contract Log Report

The Contract Log Report is reached through the menu path: **Reports, Manage Contract, Contract Log**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists pertinent contract information which could not be recorded elsewhere in CM&P. The report opens directly for the currently selected contract as shown below. Clicking on the **Report Parameters Button** allows users to select any contract's Contract Log Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

SOUTH DAKOTA DEPARTMENT OF TRANSPORTATION

CONTRACT LOG

05/30/2001
Page 1 of 1

PCEMS No. 317M
Project No. PH 90-1 (00) 30 **County** MEADE
Prime Contractor AINSWORTH-BENNING CONSTRUCTION, INC.
Type of Work PCC PAVEMENT REPAIR & PCC GROOVING

Logged By Id: Livermore, Robyn
Log Date: 01/18/2001
Log Desc: Net total CCO amount is off $.01 due to rounding calculations on CCO 1, line 9.

Informal Contract Expenditures Report

The Informal Contract Expenditures Report is reached through the menu path: **Reports, Manage Contract, Informal Contract Expenditures**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists expenditures for informal contracts by region, giving expenditures and balances. The report opens with the Fiscal Year Expenditures Parameters Window, allowing users to specify the fiscal year of contracts to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Informal Contract Expenditures Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

05/30/2001 **Fiscal Year 2001** Page 1 of 1

Informal Contract Expenditures

Aberdeen Region

FY Amount	Expenditure	Balance
$798,111.65	$715,911.19	$82,200.46

Mitchell Region

FY Amount	Expenditure	Balance
$894,503.13	$523,199.46	$371,303.67

Pierre Region

FY Amount	Expenditure	Balance
$557,693.25	$291,111.39	$266,581.86

Rapid City Region

FY Amount	Expenditure	Balance
$1,713,371.61	$1,536,613.98	$176,757.63

Totals:	$3,066,836.02	$896,843.62

Maintenance Concrete Asphalt Expenditures Report

The Maintenance Concrete Asphalt Expenditures Report is reached through the menu path: **Reports, Manage Contract, Maintenance Concrete Asphalt Expenditures**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists concrete maintenance asphalt expenditures by region and installed tons, giving expenditures and balances. The report opens with the Fiscal Year Expenditures Parameters Window, allowing users to specify the fiscal year of contracts to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Maintenance Concrete Asphalt Expenditures Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

05/30/2001 **Fiscal Year 2001** Page 1 of 1

Maintenance Concrete Asphalt Expenditures

Mitchell Region

FY Amount	Installed Tons	Expenditure	Balance
$98,618.46	17,326.10	$95,653.44	$2,965.02

Pierre Region

FY Amount	Installed Tons	Expenditure	Balance
$689,256.00	50,394.98	$391,429.53	$297,826.47

Rapid City Region

FY Amount	Installed Tons	Expenditure	Balance
$97,730.91	13,379.99	$40,104.50	$57,626.41

Totals:	$527,187.47	$358,417.90

Area and Region Status Report

The Area and Region Status Report is reached through the menu path: **Reports, Manage Contract, Area and Region Status**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists contracts by DOT personnel assignment, as well as by contractor, in addition to identifying numbers as it displays the contract status information specified. The report opens with the Area and Region Status Report Parameters Window, allowing users to specify the region or area and beginning and ending dates of contracts to display, as well as which contract information to include (i.e. CCO's, Pay Estimates, and/or WPR's.) Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Area and Region Status Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

SOUTH DAKOTA DEPARTMENT OF TRANSPORTATION
Belle Fourche Area Status Report
05/01/2001 to 05/31/2001

05/31/2001
Page 1 of 4

Carlson, Michael

34722S, PCEMS: I147 - SAND STOCKPILES
Contractor: FISHER SAND & GRAVEL
Work Started: 08/22/00 **Work Completed:** 11/03/00 **DOT 246A:** **DOT 246B:** 01/23/01 **DOT 246C:** 01/30/01
DOT 21: **FHWA 47:** **Final CCO:** 02/13/01 **Final Est:** 02/28/01

CCO 2S has been prepared by Markeson, Tiny on 2001-05-22. The net change for this order is $19.30
CCO 2S has been reviewed by Carlson, Michael on 2001-05-25
CCO 2S has had a review requested by Carlson, Michael on 2001-05-25
CCO 2S has had a review completed by Livermore, Robyn on 2001-05-25

Markeson, Tiny

PH-BRO 8041(11), PCEMS: 5188 - Higgins Gulch Box
Contractor: SPEARFISH EXCAVATING INC
Work Started: **Work Completed:** **DOT 246A:** **DOT 246B:** **DOT 246C:**
DOT 21: **FHWA 47:** **Final CCO:** **Final Est:**

Pay Estimate 16 has been prepared by Markeson, Tiny on 2001-05-08
Pay Estimate 16 has been approved by Carlson, Michael on 2001-05-08
WPR 13F has been prepared by Markeson, Tiny on 2001-05-04
WPR 13F has been approved by Carlson, Michael on 2001-05-07

P 3079(00)219, PCEMS: 5415 - Asphalt Overlay - AW
Contractor: ANDERSON WESTERN INC
Work Started: 05/25/00 **Work Completed:** 10/11/00 **DOT 246A:** **DOT 246B:** 02/09/01 **DOT 246C:** 02/13/01
DOT 21: **FHWA 47:** **Final CCO:** **Final Est:**

CCO 1F has been prepared by Markeson, Tiny on 2001-05-23. The net change for this order is $-42635.75
CCO 1F has been reviewed by Carlson, Michael on 2001-05-23
CCO 1F has had a review requested by Carlson, Michael on 2001-05-23
CCO 1F has had a review completed by Livermore, Robyn on 2001-05-23

Final Voucher Needed Report

The Final Voucher Needed Report is reached through the menu path: **Reports, Manage Contract, Final Voucher Needed**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists identifying numbers and dates from the Manage Contract Window tabs for all contracts requiring Final Vouchers. The report opens directly from the currently selected contract as shown below. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Construction Measurement and Payment
Final Voucher Needed

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05/30/2001

Project: IM 29-6(24)150 **Pcems:** 3947 **Contract Id:** 117

Final Review Requested:	Final Review Completed:	Final CCO	246C Region Letter	Final Pay Estimate	DOT-20	Interest Start Date:
11/27/2000	01/16/2001	01/22/2001	04/20/2001	04/23/2001	04/27/2001	8/18/2001

Project: IM 90-5(30)260 **Pcems:** 210P **Contract Id:** 134

Final Review Requested:	Final Review Completed:	Final CCO	246C Region Letter	Final Pay Estimate	DOT-20	Interest Start Date:
01/18/2001	03/26/2001	04/18/2001	05/08/2001	05/08/2001	05/08/2001	9/5/2001

Project: P-BRF 3661(2) **Pcems:** 3860 **Contract Id:** 219

Final Review Requested:	Final Review Completed:	Final CCO	246C Region Letter	Final Pay Estimate	DOT-20	Interest Start Date:
12/04/2000	12/11/2000	03/29/2001	04/18/2001	04/24/2001	04/27/2001	8/16/2001

Needs for Final Voucher Report

The Needs for Final Voucher Report is reached through the menu path: **Reports, Manage Contract, Needs for Final Voucher**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists identifying numbers and important dates for all contracts requiring Final Vouchers, specifying which items required for the Final Voucher are still missing. The report opens directly from the currently selected contract as shown below. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Construction Measurement and Payment
Needs for Final Voucher

Page 1 of 5
05/30/2001

Project: NH 0014(140)41 **Pcems:** 4791 **Contract Id:** 246

Final Review Requested:	Final Review Completed:	Final CCO	246C Region Letter	Final Pay Estimate	DOT-20	Interest Start Date:
02/27/2001			04/30/2001		03/08/2001	8/28/2001

Project: P 0034(114)366 **Pcems:** 4953 **Contract Id:** 46

Final Review Requested:	Final Review Completed:	Final CCO	246C Region Letter	Final Pay Estimate	DOT-20	Interest Start Date:
					05/30/2000	

Project: BRO 8052(34) **Pcems:** 4095 **Contract Id:** 58

Final Review Requested:	Final Review Completed:	Final CCO	246C Region Letter	Final Pay Estimate	DOT-20	Interest Start Date:
05/08/2001	05/08/2001	05/11/2001	04/20/2001	05/23/2001		8/18/2001

Contracts for Step P Processing Report

The Contracts for Step P Processing Report is reached through the menu path: **Reports, Manage Contract, Contracts for Step P Processing**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists identifying numbers and important dates for all contracts requiring Step P Processing, specifying which items required for Step P Processing are still missing. The report opens directly from the currently selected contract as shown below. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Construction Measurement and Payment
Contracts for Step P Processing

Page 1 of 1
05/30/2001

Project: BRF 6372(6)14 **Pcems:** 035S **Contract Id:** 20

Final Review Requested:	Final Review Completed:	Final CCO	Final Pay Estimate	246C Region Letter	Dot-20	Final Voucher:
		01/19/1999	01/20/1999	01/25/1999	02/02/1999	02/03/1999

Project: P 1014(09)42 **Pcems:** 0475 **Contract Id:** 47

Final Review Requested:	Final Review Completed:	Final CCO	Final Pay Estimate	246C Region Letter	Dot-20	Final Voucher:
12/13/2000	02/27/2001	03/07/2001	03/26/2001	05/03/2000	06/08/2000	04/09/2001

Project: BRO 8012(8) **Pcems:** 4625 **Contract Id:** 80

Final Review Requested:	Final Review Completed:	Final CCO	Final Pay Estimate	246C Region Letter	Dot-20	Final Voucher:
		05/14/1999	06/11/1999	04/22/1999	05/26/1999	06/28/1999

Project: P-BH 3037(1)0 **Pcems:** 5399 **Contract Id:** 83

Final Review Requested:	Final Review Completed:	Final CCO	Final Pay Estimate	246C Region Letter	Dot-20	Final Voucher:
		06/23/1999	06/23/1999	04/22/1999	06/01/1999	07/06/1999

Project: BRO 8002(3) **Pcems:** 4620 **Contract Id:** 202

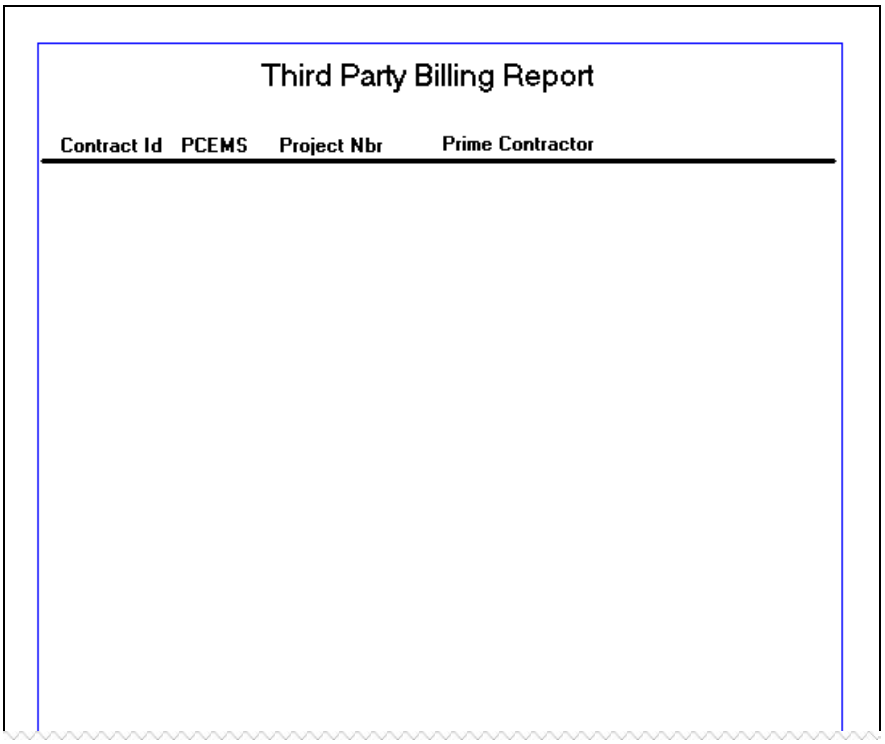
Final Review Requested:	Final Review Completed:	Final CCO	Final Pay Estimate	246C Region Letter	Dot-20	Final Voucher:
06/02/2000	07/19/2000	10/10/2000	11/02/2000	10/30/2000	06/06/2000	01/11/2001

Third Party Billing Report

The Third Party Billing Report is reached through the menu path: **Reports, Manage Contract, Third Party Billing**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, or printing the report. This report displays contract IDs and prime contractors for contracts according to PCEMS and project numbers. The report opens directly from the currently selected contract as shown below. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.



Closed Contracts Report

The Closed Contracts Report is reached through the menu path: **Reports, Manage Contract, Closed Contracts**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, or printing the report. This report displays contract IDs, closed dates and prime contractors for contracts according to PCEMS and project numbers. The report opens directly from the currently selected contract as shown below. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

03/05/2002 **Closed Contracts** Page 1 of 14

Project Nbr	Main Project	PCEMS	Contract Id	Contract Closed Date	Prime Contractor
P 0019(00)80	✓	3811	1	03/01/2002	INDUSTRIAL BUILDERS INC, FARGO, ND
0203-472	✓	246P	2	01/31/2002	HILLS MATERIAL COMPANY, RAPID CITY, SD
0342-472		243R	2	01/31/2002	HILLS MATERIAL COMPANY, RAPID CITY, SD
0753-472		245R	2	01/31/2002	HILLS MATERIAL COMPANY, RAPID CITY, SD
0793-472		244R	2	01/31/2002	HILLS MATERIAL COMPANY, RAPID CITY, SD
0442-452	✓	226R	3	02/01/2002	HILLS MATERIAL COMPANY, RAPID CITY, SD
0852-451		228R	3	02/01/2002	HILLS MATERIAL COMPANY, RAPID CITY, SD
097WF-452		227R	3	02/01/2002	HILLS MATERIAL COMPANY, RAPID CITY, SD
14A2-451		229R	3	02/01/2002	HILLS MATERIAL COMPANY, RAPID CITY, SD
0162/4-452		329R	9	12/28/1998	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD
0167WF-452		232R	9	12/28/1998	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD
0342-451		233R	9	12/28/1998	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD
0442-452		231R	9	12/28/1998	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD
0442-452		327R	9	12/28/1998	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD
0901-451		235R	9	12/28/1998	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD
0901-451		236R	9	12/28/1998	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD
0901-452		234R	9	12/28/1998	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD
0907EF-451		237R	9	12/28/1998	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD
0907EF-451		238R	9	12/28/1998	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD

Record Work Reports

Install Item Summary Report

The Install Item Summary Report is reached through the menu path: **Reports, Record Work, Install Item Summary**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides summary information about pay items on the selected contract. The report opens directly for the currently selected contract as shown below. Clicking on the **Report Parameters Button** allows users to select any contract's Install Item Summary Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

05/30/2001 **Item Installation Summary** Page 1 of 1

PCC PAVEMENT REPAIR with AINSWORTH-BENNING CONSTRUCTION, INC.

Main Project # PH 90-1 (00) 30 **Main PC #** 317M Rapid City Area -> Rehorst, John

PCC PAVEMENT REPAIR & PCC GROOVING

Line No		Units	Description	Unit Price	Contract Qty	Installed Qty	Authorized Qty
001	N	L.S.	MOBILIZATION	$1.000	3,500.000	3,500.000	3,500.000
002	N	TON	GRAVEL CUSHION	$15.500	0.000	0.000	0.000
003	N	SQYD	PCC PAVEMENT GROOVING	$2.150	20,898.000	20,898.000	20,898.000
004	N	SQYD	PCC PVMT REPAIR,NONREINFORCD	$93.350	190.100	190.100	190.100
005	N	EACH	DOWEL BAR	$9.500	49.000	49.000	49.000
006	N	EACH	INST STEEL BAR IN CONC PVMT	$12.400	451.000	451.000	451.000
007	N	UNIT	TRAFFIC CONTROL	$3.850	2,654.000	2,654.000	2,654.000
008	N	L.S.	TRAFFIC CONTROL MISC.	$1.000	5,515.000	5,515.000	5,515.000
009	N	HOUR	FLAGGING	$14.050	337.500	337.500	337.500
010	N	EACH	TYPE C ADV WARNG ARROW PANEL	$1,100.000	2.000	2.000	2.000
011	N	L.S.	EXCISE TAX	$1.000	73.900	73.900	73.900

Install Item Detail Report

The Install Item Detail Report is reached through the menu path: **Reports, Record Work, Item Install Detail**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report displays all of the information recorded for each pay item, including the date of each recording, the recorder, and the location of the recording. The overview information presented in the summary report is also shown in the detailed report. The report opens with the Install Item Detail Report Parameters Window, allowing users to specify the contract ID, number of pay items selected, and which work to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select any contract's Install Item Detail Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

05/30/2001 **Item Installation Detail** Page 1 of 2

PCC PAVEMENT REPAIR with AINSWORTH-BENNING CONSTRUCTION, INC.

Main Project # PH 90-1 (00) 30 **Main PC #** 317M Rapid City Area -> Rehorst, John

PCC PAVEMENT REPAIR & PCC GROOVING

Line No	Units	Description	Unit Price	Contract Qty	Installed Qty	Authorized Qty
001N	L.S.	MOBILIZATION	$1.000	3,500.000	3,500.000	3,500.000
PC #	Inspector	Accomplished	Installed	Authorized	Location	
317M	Rehorst, John	02/02/2001	3,500.000	3,500.000		
002N	TON	GRAVEL CUSHION	$15.500	0.000	0.000	0.000
003N	SQYD	PCC PAVEMENT GROOVING	$2.150	20,898.000	20,898.000	20,898.000
PC #	Inspector	Accomplished	Installed	Authorized	Location	
317M	Rehorst, John	07/17/2000	20,898.000	20,898.000	plans quantity	
004N	SQYD	PCC PVMT REPAIR,NONREINFORCD	$93.350	190.100	190.100	190.100
PC #	Inspector	Accomplished	Installed	Authorized	Location	
317M	Rehorst, John	06/21/2000	46.900	46.900	EB Driving Lane	
	Rehorst, John	06/23/2000	74.700	74.700	west bound driving lane	
	Rehorst, John	07/05/2000	64.500	64.500	ebdl east of bridges	
	Rehorst, John	07/14/2000	4.000	4.000	(6' x 6')/9 = 4 sqyds. westbound passing lane	
005N	EACH	DOWEL BAR	$9.500	49.000	49.000	49.000
PC #	Inspector	Accomplished	Installed	Authorized	Location	
317M	Rehorst, John	06/21/2000	15.000	15.000	EB Driving Lane	
	Rehorst, John	06/23/2000	24.000	24.000	west and eastbound driving lanes	
	Rehorst, John	07/05/2000	10.000	10.000	ebdl east of bridges	

Pay Estimate Reports

Pay Estimate Report

The Pay Estimate Report is reached through the menu path: **Reports, Pay Estimate, Pay Estimate**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides overview information about the specified pay estimate. The report opens with the Pay Estimate Report Parameters Window, allowing users to specify the contract ID and pay estimate number of the contract to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Pay Estimate Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Contractor: HILLS MATERIALS COMPANY
3975 STURGIS ROAD
PO BOX 2320 (460314102)
RAPID CITY SD 57709-2320

South Dakota Department of Transportation
Construction Pay Estimate

Printed 05/30/2001
Area: Custer Area
Project Engineer: Gary Diedtrich

Project Number	PC No	Work Type	Orig Contr Amt	Award Date	Est No	Period Ending	Royalty	Liq Damages
49 72G	I209	GRAVEL STOCKPILE AT EDGEMONT EAST MAINTENANCE	31,850.00	12/15/2000	5F	04/07/2001	.00	.00

Line No	CCO No	Stnd Bid Item No	Unit	Item Description	Unit Price	Original Qty	Qty to Be Constructed	Qty Paid To Date	Amt Paid To Date	Change In Qty This Estimate	$ Amount This Estimate
001N		009E0010	LS	Mobilization	1.000	100.000	100.000	100.000	$100.00		
002N		740E0500	Ton	Crushed Aggregate Modified	6.350	5,000.000	5,000.000	5,001.000	$31,756.35	0.040	$0.25

Participating Amount To Date	$0.00	**Participating Amount This Estimate**	$0.00
Non-Participating Amount To Date	$31,856.35	**Non-Participating Amount This Estimate**	$0.25
Total To Date	$31,856.35	**Total This Estimate**	$0.25
Deduct Liquidated Damages To Date	$0.00	**Deduct Liquidated Damages This Estimate**	$0.00
Deduct Royalties To Date	$0.00	**Deduct Royalties This Estimate**	$0.00
Amount Due To Date	$31,856.35	**Amount Due This Estimate**	$0.25

Percent of Work in Place 100.02%

Construction Payment Status Report

The Construction Payment Status Report is reached through the menu path: **Reports, Pay Estimate, Construction Payment Status**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report displays contract amounts, payments to date, percentage complete, prime contractors, and work types for contracts according to PCEMS numbers. The report opens directly for the currently selected contract as shown below. The report opens directly for the currently selected contract as shown below. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

05/30/2001 **Construction Payment Status** Page 1 of 25

Accounting Proj Nbr	PCEMS Nbr	Work Type	Contract Amount	Payments To Date	% Comp	Contractor	
	368M	STOCKPILE(GRAVEL, ETC.)	$5,423.00	$0.00	0%	LUKE, TOM CONSTRUCTION, KIMBALL, SD	
	377M	STOCKPILE(GRAVEL, ETC.)	$118,500.00	$0.00	0%	MORRIS INC, PIERRE, SD	
000I-252	I174	VARIOUS MISC PROJECT	$60,734.53	$40,188.13	66%	BUSKERUD CONSTRUCTION, INC., DELL RAPIDS, SD	
000I-252	I064	INSTALL / REPLGUARDRL	$54,305.00	$54,305.00	100%	BUSKERUD CONSTRUCTION, INC., DELL RAPIDS, SD	*Finaled*
000I-252	I081	FENCE RESTORATION	$83,659.03	$83,659.03	100%	PRAIRIE FENCING, FT. PIERRE, SD	*Finaled*
000I-271	I176	INSTALL / REPLGUARDRL	$147,996.68	$96,903.23	65%	BUSKERUD CONSTRUCTION, INC., DELL RAPIDS, SD	
000I-271	I066	INSTALL / REPLGUARDRL	$73,111.14	$73,111.14	100%	BUSKERUD CONSTRUCTION, INC., DELL RAPIDS, SD	*Finaled*
000I-271	I213	FENCE RESTORATION	$151,665.38	$1,250.00	1%	MICHAELS FENCO CO., SIOUX FALLS, SD	
000I-272	I110	FENCE RESTORATION	$75,305.53	$75,305.53	100%	NORTHWEST LANDSCAPING, INC., HULL, IA	*Finaled*
000I-272	I210	FENCE RESTORATION	$137,481.50	$26,022.78	19%	DAWSON CONSTRUCTION, INC., HOWARD, SD	
000I-291	I073	FENCE RESTORATION	$97,378.56	$63,470.71	65%	SUPERIOR FENCE & DECK, SIOUX FALLS, SD	
000I-468	I185	VARIOUS MISC PROJECT	$94,095.00	$67,433.50	72%	HILT, J H ENGINEERING INC, BLACK HAWK, SD	
000I-468	I049	INSTALL / REPLGUARDRL	$9,353.00	$9,353.00	100%	HILT, J H ENGINEERING INC, BLACK HAWK, SD	*Finaled*
0102-152	066M	CRACK SEALING	$126,968.00	$126,968.00	100%	HIGHWAY IMPROVEMENT INC, SIOUX FALLS, SD	*Finaled*
0104-172	I047	VARIOUS MISC PROJECT	$63,989.42	$63,989.42	100%	DAKOTA CONTRACTING CORPORATION, SIOUX FALLS, SD	*Finaled*
0113-271	I074	Unknown	$57,307.56	$57,307.56	100%	DAWSON CONSTRUCTION, INC., HOWARD, SD	*Finaled*

Progress Summary Report

The Progress Summary Report is reached through the menu path: **Reports, Biweekly Progress Reports, Progress Summary Report**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides overview information about the specified contract(s). The report also lists the prime contractor and the name of the engineer managing the contract, as well as breaks down the Projects listing the job description and the Counties involved. Pay Estimate information is also included including Period Beginning and Ending Dates, Percent Complete and Liquidated Damages. The report opens with the Contract Summary Report Parameters Window, allowing users to specify the status, contractors, and/or regions of contracts to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Progress Summary Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

06/01/2001 **Progress Summary Report** Page 1 of 2

Contracts In Progress For UPPER PLAINS CONTRACTING INC

Contract #	Original Amt	% Complete	Contract Time	Let Date	Start Date	Completion Date	Region Accept	Final Est	Final Vchr	Final CCO
614	$9,152,708.42	15.96%	11/02/01	10/18/00	04/16/01					

Prime Contractor: UPPER PLAINS CONTRACTING INC — Managed by: Wick, David Aberdeen Area

5373 NH 0281(19)194 STRUCTURE(S) — BROWN
US281 FM US12 N & E IN ABERDEEN (WEST BYPASS)

589R NH 0012(23)288 PCC PAVING — BROWN
US12 FM US281 E & W

Pay Est. #	Period Beginning Date	Period Ending Date	% Complete	Liquidated Damages
1	10/20/2000	11/02/2000	0.62%	$0.00
2	11/03/2000	11/16/2000	1.36%	$0.00
3	12/31/2000	01/13/2001	2.78%	$0.00
4	01/14/2001	01/27/2001	2.94%	$0.00
5	02/11/2001	02/24/2001	2.95%	$0.00
6	02/25/2001	03/10/2001	3.12%	$0.00
7	04/08/2001	04/21/2001	6.65%	$0.00
8	04/22/2001	05/05/2001	11.90%	$0.00
9	05/06/2001	05/19/2001	15.96%	$0.00
10	05/20/2001	06/02/2001	15.96%	$0.00

Contract #	Original Amt	% Complete	Contract Time	Let Date	Start Date	Completion Date	Region Accept	Final Est	Final Vchr	Final CCO
509	$2,367,838.69	97.13%	12/01/00	05/17/00	07/06/00					

Prime Contractor: UPPER PLAINS CONTRACTING INC — Managed by: Larson, Jay Aberdeen Area

5851 NH 0012(47)341 GRADE, STORM SEWER, C&G, ETC. & PCC PAVING — DAY
US12 THROUGH WEBSTER

Pay Est. #	Period Beginning Date	Period Ending Date	% Complete	Liquidated Damages
1	05/13/2000	05/26/2000	0.68%	$0.00
2	05/27/2000	06/09/2000	0.74%	$0.00
3	07/16/2000	07/29/2000	4.22%	$0.00

Contract Change Order Reports

Cost Summary by Category Report

The Cost Summary by Category Report is reached through the menu path: **Reports, Contract Change Order, Cost Summary By Category**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides cost and category (e.g. Design Changes, Value Engineering, etc.) information about the specified contract(s). The report opens with the CCO Cost Summary By Category Report Parameters Window, allowing users to specify the categories, preparation dates, and/or regions of contracts to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Cost Summary By Category Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

05/31/2001 **CCO Cost Summary By Category** Page 1 of 1

Category: Value Engineering

	# of CCOs	Net change
Aberdeen Region	3	($27,996.67)
Mitchell Region	14	$50,038.58
Pierre Region	4	($7,594.00)
Rapid City Region	14	$50,152.23

Total all Categories:	# of CCOs	Net change
Aberdeen Region	3	($27,996.67)
Mitchell Region	14	$50,038.58
Pierre Region	4	($7,594.00)
Rapid City Region	14	$50,152.23
Statewide	0	$0.00
	35	$64,600.14

CCO 220A Report

The CCO 220A Report is reached through the menu path: **Reports, Contract Change Order, CCO 220A**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report displays all of the information currently recorded for the specified CCO. The bottom of the report contains four to six signature blocks — the most being: Contractor Acceptance, Area Recommend, Region Engineer Recommend, Division Director Recommend, Transportation Secretary Approval, and Division Administrator of the Federal Highway Administration. By signing, each person indicates his or her approval of the information presented on the report. The report opens with the CCO Report Parameters Window, allowing users to specify the contract and change order number of the desired CCO 220A Report to display. Once generated, the report displays as shown below. (However, the word "*DRAFT*" would appear on this report for an unprepared CCO). Clicking on the **Report Parameters Button** allows users to select another CCO 220A Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

DOT-220A **South Dakota Department of Transportation** Page 1 of 1

Rev. 2/97 **Construction Change Order No** 2F Printed 05/31/2001

PC No 317M

Project No PH 90-1 (00) 30 **County** MEADE **Contract Amt** $91,288.25

Type of Work PCC PAVEMENT REPAIR & PCC GROOVING

Contractor AINSWORTH-BENNING CONSTRUCTION, INC.

Line No. 011 N EXCISE TAX **73.900@** **1.000/ L.S.** **New**

Excise Tax Adjustment

No Time will be added to the contract for this change.

The net change due to this CCO is an increase of $73.90

CCO 220B Report

The CCO 220B Report is reached through the menu path: **Reports, Contract Change Order, CCO 220B**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report displays all of the information currently recorded for the specified CCO by line item, change quantity, and change amount. The report opens with the CCO Report Parameters Window, allowing users to specify the contract and change order number of the desired CCO 220B Report to display. Once generated, the report displays as shown below. (However, the word "*DRAFT*" would appear on this report for an unprepared CCO). Clicking on the **Report Parameters Button** allows users to select another CCO 220B Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

DOT-220B
Rev. 2/97

South Dakota Department of Transportation

Page 1 of 1
Printed 05/31/2001

Backup sheet to accompany Construction Change Order No 2F

PC No 317M
Project No PH 90-1 (00) 30 **County** MEADE **Contract Amt** $91,288.25
Type of Work PCC PAVEMENT REPAIR & PCC GROOVING
Contractor AINSWORTH-BENNING CONSTRUCTION, INC.

Line No	Stnd Bid Item No	Item Description	Qty As Now Ordered	Current Change In Qty	Unit Price	Unit	Current Change In Amt
011N	009.0016	EXCISE TAX	73.900	73.900	1.000	L.S.	$73.90

Increase This Order	$73.90
Decrease This Order	$0.00
Net ChangeThis Order	$73.90
Net Change To Date	$3,694.86

Description And Reason For Change

Line No. 011 N EXCISE TAX **73.900 @** **1.000 / L.S.** **New**
Excise Tax Adjustment

Approved CCO Changes Report

The Approved CCO Changes Report is reached through the menu path: **Reports, Contract Change Order, Approved CCO Changes**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides information about approved Contract Change Orders by region and area, and includes the original contract amount, current contract amount, percentage change, amount of increases, amount of decreases and the total amount of change for every contract. The report also displays the region totals at the end of each section and the grand totals on the last page. The report opens with the CCO Changes By Year Report Parameters Window, allowing users to specify the year (by number and fiscal status) of the desired Approved CCO Changes Report to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Approved CCO Changes Report to view. The information in this report can be sorted using the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Approved CCO Changes for Fiscal Year 2001

05/31/2001 Page 1 of 72

Aberdeen Region

Aberdeen Area

PCEMS Nbr	Project Nbr	Original Amount	Current Amount	Percent Change
021M	PH 0012(00)330	$149,607.95	$290,562.38	94.22%

	Increase	Decrease		
Total:	$144,621.43	($3,667.00)	=	$140,954.43

PCEMS Nbr	Project Nbr	Original Amount	Current Amount	Percent Change
032S	BRF 6525(01)	$292,384.50	$293,346.44	0.33%

	Increase	Decrease		
Total:	$4,015.24	($3,053.30)	=	$961.94

PCEMS Nbr	Project Nbr	Original Amount	Current Amount	Percent Change
036S	BRF 6599(1)	$375,791.20	$372,139.00	(0.97%)

	Increase	Decrease		
Total:	$662.50	($4,314.70)	=	($3,652.20)

Final CCO Report

The Final CCO Report is reached through the menu path: **Reports, Contract Change Order, Final CCO Report**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report displays all of the information regarding the status of elements (such as CCO's, pay estimates, etc.) for the currently selected contract. It will notify users when price adjustments exist that are not assigned to a Contract Change Order. This report is often referred to as a way of determining the elements that need to be completed before a contract can be finalled. The report opens directly for the currently selected contract as shown below.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Administered by Diedtrich, Gary — **Final CCO Report** — Page 1 of 1
Custer Area — Gravel Stockpile — Printed 05/31/2001

Original Amt $31,850.00 **Current Amt** $31,850.00 **CCO Amt** $0.00 **Payments** $31,856.35

Awarded 12/15/2000
Original Completion 05/26/2001
DOT209 - Auth. Signature
Notice To Proceed 12/15/2000
Work Started 02/20/2001
Work Completed 03/23/2001
DOT21 - Matl Cert Received
DOT246A - Contractor Req Letter
FHWA47 - Statement of Matl/Labor
Interest Begins 07/27/2001
Final Voucher Received
DOT244 - Final Estimate Letter
DOT246B - Recommend Accept Letter Sent 03/23/2001
Acceptance Letter Written 03/29/2001
Contract Closed

Prime Contractor HILLS MATERIALS COMPANY
First Party

Planned DBE Participation .00%
Actual DBE Participation .00%
Actual DBE Participation Date

DOT246A - Contractor Met Requirements? N
Federal Oversight? N
EEO1391 - Employment Report For Prime? N
EEO#7 - Notice to Employees For Prime? N
Contract Finalled? N

DOT240 - AdjustmentStatus

SubContractors

Projects

Project No	PCEMS No	Description
34972G	I209	GRAVEL STOCKPILE AT EDGEMONT EAST MAINTENANCE YARD

Open Pay Estimates

Pay Est No	Period Ending	$ Amt This Est	Royalty Deduction	Liquidated Damages
5F	4/7/2001	$0.25	$0.00	$0.00

Open CCOs

CCO No	Add. Days	New Compl Date	Sent To Contr	Rec Fm Contr	Description
1F	0				

Line No	Stnd Bid Item No	Item Description	Unit	Unit Price	Reason
001N	009E0010	Mobilization	LS	$1.00	Qty Paid not equal to Auth Install Qty

CCO Needs Report

The CCO Needs Report is reached through the menu path: **Reports, Contract Change Order, CCO Needs Report**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report displays all of the recorded information for the pay items specified. The report opens with the CCO Needs Report Parameters Window, allowing users to specify which contract pay items to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another CCO Needs Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

08/17/2001 **Items Which Need a CCO** Page 1 of 1

with JENSEN, IRVING F CO INC

Main Project # IM 29-2(9)61 **Main PC #** 5360 Sioux Falls Area -> Neumeister, Steve

I29 NBL FM S OF THE CANTON EXIT TO THE TEA EXIT & STRS 0.6 N OF THE WORTHING EXIT & 2.7 N OF SD44

Line No	Units	Description	Contract Qty	Installed Qty	Authorized Qty	Change Needed	Greater or equal to 20%
024P	Each	Salvage Traffic Sign	33.000	66.000	66.000	33.000	✓
038P	Ton	Pit Run Material	3,368.600	5,895.340	5,895.340	0.040	
045P	Ton	Gravel Cushion	886.900	2,608.300	2,608.300	2,608.300	✓
092P	CuYd	Class A45 Concrete, Bridge	127.600	141.500	127.600	13.900	
159P	Mile	Raised Pavement Markers	11.000	12.480	12.480	1.480	
161P	Each	Tubular Marker	580.000	755.000	755.000	175.000	✓

Contract Issue Reports

Contract Issue Report

The Contract Issue Report is reached through the menu path: **Reports, Contract Issue, Contract Issue**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report displays all of the recorded information for each contract issue that is currently associated with the contract specified. The report opens with the Contract Issue Report Parameters Window, allowing users to specify the contract ID and Issue Number of the desired Contract Issue Report to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Contract Issue Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Since the Contract Issue Report opens to the Contract Issue Report Parameters Window with contract and issue number fields to be specified, users may check for issues in a contract without actually generating this report. Clicking on the pull-down options arrow for the issue number field and receiving an empty issue number selection field indicates that the contract selected has no issues.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

SOUTH DAKOTA DEPARTMENT OF TRANSPORTATION

Contract Issue No. 1

06/01/2001

Page 1

PCEMS No. A590
Project No. P-PH 6404(07) **County** PENNINGTON
Prime Contractor ZANDSTRA CONSTRUCTION INCORPORATED
Type of Work GRDG, AC SURF, RESURF & STR (4-12'X 8' PRECAST BC)

Created on 10/09/2000 **Status** Open **Closed On** **Claim Submitted On**
Created By Anderson, Bill **Claim Amount** $0.00

Issue

In a letter of 9/29/2000 from Steve Zandstra to Bill Anderson Mr. Zandstra requests 14 days to complete segment 1 due to late reciept of the notice to proceed and failure of utilities to complete prompt location and moving of utilities. Currently a meeting with Utilities and Zandstra Construction is scheduled for 10/10/200 at 11:00 AM.

Resolution:

Specification Deviation

Spec Dev Type: Work **Spec Dev Status:** Open
Material Group:

Action Taken
Determination
Comments:
Anderson, Bill
Heier, Mark

Contract Issue Summary Report

The Contract Summary Report is reached through the menu path: **Reports, Contract Issue, Contract Issue Summary**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides information about each issue associated with the contract, including the issue status and recorder, its resolution, and claim amount, as well as dates for: its recording, closing, and claim filing. The report opens with the Contract Issue Summary Report Parameters Window, allowing users to specify the issue status and contract ID of the Contract Issue Summary Report to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Contract Issue Summary Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Contract Issues

Page 1
Report Date: 06/04/2001

ZANDSTRA CONSTRUCTION INCORPORATED, RAPID CITY, SD 57709-1940

Created On: 10/09/2000 **Status: Open** **Closed On:** **Claim Submitted On:**
Created By: Anderson, Bill **Claim Amount: $0.00**

Issue

Bill Anderson has been informed from the Pennington County States Attorney's Office not to enter any of the properties in condemnation including staking. A memo has been prepared and delivered to Zandstra Construction along with a map of affected areas of the project relating to this matter.

Met with Steve Zandstra and discussed alternatives schedules for this situation. Segment 1 has no area in itself which is affected, but the section needs approximately 5200 CY of material to be moved from outside this segment to complete the grade. Mr. Zandstra proposes to get this material from one of the areas where we are currently not allowed to enter (46 + 00 - 52 + 00 right).

As an alternative to finishing the grade in segment 1 at this time 25 working days was offered to complete this grading with aggregate base in place from the date entry is allowed. Also grading from 100 + 00 - 161 + 00 will be allowed out of sequence so that work may proceed. No added costs are anticipated at this time. Added costs may arise if the 13000CY of material must be hauled in legal on road loads in lieu of in off road loads.

Expect further direction from the States Attorney's Office during the week of 10/9 - 10/13, 2000.

Resolution:

Created On: 10/09/2000 **Status: Open** **Closed On:** **Claim Submitted On:**
Created By: Anderson, Bill **Claim Amount: $0.00**

Issue

In a letter of 9/29/2000 from Steve Zandstra to Bill Anderson Mr. Zandstra requests 14 days to complete segment 1 due to late reciept of the notice to proceed and failure of utilities to complete prompt location and moving of utilities.

Currently a meeting with Utilities and Zandstra Construction is scheduled from 10/10/2000 at 11:00 A.M.

Resolution:

Report of Specification Deviation (DOT 18)

The Report of Specification Deviation (DOT 18) is reached through the menu path: **Reports, Contract Issue, Report of Specification Deviation**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides information about a specification deviation for the contract, including the failing sample's field number, test date, test results, and specification, as well as any corrective action tests and/or action(s) taken. The report opens with the Specification Deviation Parameters Window, allowing users to specify the issue number and contract ID of the Specification Deviation to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Report of Specification Deviation (DOT 18) to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Sample ID 20796

DOT 18
(09/2001)

REPORT OF SPECIFICATION DEVIATION

File # _____

PROJECT NH 212(99)226 COUNTY POTTER PCEMS 3758

CONTRACTOR FOOTHILLS CONTRACTING INC AREA ENGINEER John Villbrandt

MATERIAL Total Embankment

WORK INVOLVED _____

Field #	Test	Test Date	Test Results	Specification
09Emb	Nuclear Method Density (% Density)	11/06/2001	91.000	95.000 - 108.000

Field #	Test	Test Date	Test Results	Specification
09xEmb	Nuclear Method Density (% Density)	11/06/2001	96.000	95.000 - 108.000

ACTION TAKEN (Attach additional sheets as necessary.)

AREA ENGINEER DATE REGION ENGINEER DATE

The Price Adjustment is as set forth in the letter from the Region Engineer.

Copies to: Area
Region
Region Materials
Certification
Construction Management
Contractor (thru Area Engineer when Price Adjustment is involved)
FHWA (when Federal funds are involved)

Work Authorization Reports

Work Authorization Report

The Work Authorization Report is reached through the menu path: **Reports, Work Authorization, Work Authorization**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides a description of extra work ordered for a contract. The headings within it include the Project Number, PCEMS Number, County, Type of Work and the name of the Contractor. The body of the report contains work authorization information. The bottom of the report contains the Accepted Date and Accepted By information as well as the Authorized Date and Authorized By information. The report opens with the Work Authorization Report Parameters Window, allowing users to specify the contract ID and work authorization number of the Work Authorization Report to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Work Authorization Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

DOT-228 **SOUTH DAKOTA DEPARTMENT OF TRANSPORTATION** 06/01/2001

Extra Work Authorization No. 1

Project No. P 0034(85)245 PCEMS No. 3539

County HYDE

Type of Work GRADING, STRUCTURE AND INTERIM SURFACING (LARGE PIPE, AND 3 SITE)

Contractor A-G-E CORPORATION

You are hereby authorized and instructed to do the work described herein in accordance with the terms of the contract.
There are three locations along detour B that have existing advisory signs for children at play. After studying and discussing the situation with Pierre Region Traffic Engineer, the results were upgrading the existing advisory signing at three locations along designated detours. Also discussed with Pierre Region Traffic Engineer were the existing county signs, stop ahead, resulting in replacing existing signs with new signs. These two situations justify a change in quantity for Item No. 632E3203 Flat Aluminum Sign, Non Removable Copy Type III, additional quantities are as follows:
6 - W11-2, Pedestrian Symbol, 30" x 30", color - black on fluorescent yellow green, 6.25 sq. ft. each.
6 - W13-1, 35 mph speed plate, 18" x 18", color - black on fluorescent yellow green, 2.25 sq. ft. each.

Accepted Date: _____ Authorized Date: _____
By: _____ By: _____
_____ (Title) _____ (Title)

Biweekly Progress Reports Reports

Biweekly Progress Reports Report

The Biweekly Progress Reports Report is reached through the menu path: **Reports, Biweekly Progress Reports, Biweekly Progress Reports**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report displays all of the recorded information for the Biweekly Progress Report specified. The bottom of the Biweekly Progress Reports Report contains a list of personnel and agencies who are to receive a carbon copy of the printed report (including the region engineer, the FHWA, the region materials engineer, the construction engineer, the bridge engineer, and a copy for the file). There are also signature blocks for the persons who prepared and approved the report. The report opens with the Biweekly Progress Report Parameters Window, allowing users to specify the contract and report number of the desired Biweekly Progress Reports Report to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Biweekly Progress Reports Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

DOT-234 (11-95)
06/01/2001

SOUTH DAKOTA DEPARTMENT OF TRANSPORTATION

Page 1 of 2

Bi-Weekly Progress Report No. 17 (Apr 22, 2001 - May 05, 2001)

PCEMS No. A590
Project No. P-PH 6404(07) **County** PENNINGTON
Prime Contractor ZANDSTRA CONSTRUCTION INCORPORATED
Type of Work GRDG, AC SURF, RESURF & STR (4-12'X 8' PRECAST BC)

Contract Amount $5,420,801.97
Period Ending 05/05/2001
Orig Compl Date 10/15/2001
Orig Contract Time 0 Working Days
Penalty Days 0.0 Days

Work Started 09/20/2000 **Work Suspended** **Work Resumed** **Field Work Completed**

Working Days This Period	Working Days To Date	Penalty Days This Period	Penalty Days To Date
0.00	-0.50	0.00	0.00

Percent Complete 18.72%
Amount Paid to Date $1,014,662.87

Work In Progress This Period

Work has concentrated on segment one (0+00 - 39+50) including Salvage of existing surface and grading. Planned CMP was delivered to project.

General Comments

Have had two discusions concerning construction schedule for completion of all work. These discusions will probably lead to revised interim completion dates for grading and possibly extend the surfacing completion.
Utility relocation is being completed on segment 6 (194+00 - end of project); retiring of overhead communication lines should begin within two weeks.

Revision Comments

Contractors Working	Name	Week 1 Exempt	Week 2 Exempt
Anderson Highway Signs & Supply Inc		Worked	
Baker Timber Products Inc			Worked
Banner & Associates Inc			Worked
Hills Materials Company			
Jensen Construction Inc			

Day	Date	Working Day #	Penalty Day #	Weather and Comments
Sunday	04/22/2001			High 32. Low 27. Heavy snow - 20" last night.
Monday	04/23/2001			High 53. Low 31. Mostly sunny.
Tuesday	04/24/2001			High 63. Low 44. Sunny. Warm.
Wednesday	04/25/2001			High 75. Low 46. Exceptional day.
Thursday	04/26/2001			High 77. Low 54. Sunny & clear.
Friday	04/27/2001			High 85. Low 48. Warm. Sunny.
Saturday	04/28/2001			High 85. Low 50. Mostly sunny.
Sunday	04/29/2001			High 77. Low 57. Breezy. Partly cloudy.
Monday	04/30/2001			High 71. Low 46. Partly sunny. PM shower.
Tuesday	05/01/2001			High 68. Low 48. Breezy. Sunny.
Wednesday	05/02/2001			High 54. Low 38. Cool. Partly cloudy.

CC: Region Engineer
FHWA
Region Materials Engineer
Construction Engineer
Bridge Engineer
File

Prepared by _____

Approved by _____
Rapid City Area Engineer

Multi Biweekly Progress Reports

The Multi-Biweekly Progress Reports Report is reached through the menu path: **Reports, Biweekly Progress Reports, Multi Biweekly Progress Reports**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report displays all of the recorded information for the Biweekly Progress Reports specified. The bottom of each Biweekly Progress Reports Report contains a list of personnel and agencies who are to receive a carbon copy of the printed report (including the region engineer, the FHWA, the region materials engineer, the construction engineer, the bridge engineer, and a copy for the file). There are also signature blocks for the persons who prepared and approved the reports. The report opens with the WPR Contractor Working Report Parameters Window, allowing users to specify the area or region and begin and end dates of the desired Multi Biweekly Progress Reports Report to display. Once generated, the report displays as shown below (succeeding Biweekly Reports are layered behind it). Clicking on the **Report Parameters Button** allows users to select another Multi Biweekly Progress Reports Report to view.

The Beginning and End dates selected in the WPR Contractor Working Report Parameters Window must be within two weeks of each other.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

DOT-234 (11-95)
06/01/2001

SOUTH DAKOTA DEPARTMENT OF TRANSPORTATION

Page 1 of 2

Bi-Weekly Progress Report No. 17 (Apr 22, 2001 - May 05, 2001)

PCEMS No. A590
Project No. P-PH 6404(07) **County** PENNINGTON
Prime Contractor ZANDSTRA CONSTRUCTION INCORPORATED
Type of Work GRDG, AC SURF, RESURF & STR (4-12'X 8' PRECAST BC)

Contract Amount $5,420,801.97
Period Ending 05/05/2001
Orig Compl Date 10/15/2001
Orig Contract Time 0 Working Days
Penalty Days 0.0 Days

Work Started 09/20/2000 **Work Suspended** **Work Resumed** **Field Work Completed**

Working Days This Period	Working Days To Date	Penalty Days This Period	Penalty Days To Date
0.00	-0.50	0.00	0.00

Percent Complete 18.72%
Amount Paid to Date $1,014,662.87

Work In Progress This Period

Work has concentrated on segment one (0+00 - 39+50) including Salvage of existing surface and grading. Planned CMP was delivered to project.

General Comments

Have had two discusions concerning construction schedule for completion of all work. These discusions will probably lead to revised interim completion dates for grading and possibly extend the surfacing completion.
Utility relocation is being completed on segment 6 (194+00 - end of project); retiring of overhead communication lines should begin within two weeks.

Revision Comments

Contractors Working Name	Week 1 Exempt	Week 2 Exempt
Anderson Highway Signs & Supply Inc	Worked	
Baker Timber Products Inc		Worked
Banner & Associates Inc		Worked
Hills Materials Company		
Jensen Construction Inc		

Day	Date	Working Day #	Penalty Day #	Weather and Comments
Sunday	04/22/2001			High 32. Low 27. Heavy snow - 20" last night.
Monday	04/23/2001			High 53. Low 31. Mostly sunny.
Tuesday	04/24/2001			High 63. Low 44. Sunny. Warm.
Wednesday	04/25/2001			High 75. Low 46. Exceptional day.
Thursday	04/26/2001			High 77. Low 54. Sunny & clear.
Friday	04/27/2001			High 85. Low 48. Warm. Sunny.
Saturday	04/28/2001			High 85. Low 50. Mostly sunny.
Sunday	04/29/2001			High 77. Low 57. Breezy. Partly cloudy.
Monday	04/30/2001			High 71. Low 46. Partly sunny. PM shower.
Tuesday	05/01/2001			High 68. Low 48. Breezy. Sunny.
Wednesday	05/02/2001			High 54. Low 38. Cool. Partly cloudy.

CC: Region Engineer
FHWA
Region Materials Engineer
Construction Engineer
Bridge Engineer
File

Prepared by _____

Approved by _____
Rapid City Area Engineer

Approved Biweekly Progress Reports Report

The Approved Biweekly Progress Reports Report is reached through the menu path: **Reports, Biweekly Progress Reports, Approved Biweekly Progress Reports**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides a description of specified contracted work done, categorized by PCEMS number, Project number, WPR number, weeks covered, work begin and complete dates, percent complete, contractors and if the contractor was working during that time frame. The report opens with the WPR Contractor Working Report Parameters Window, allowing users to specify the begin date and end date of the desired Approved Biweekly Progress Reports Report to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Approved Biweekly Progress Reports Report to view.

Any dates selected in the WPR Contractor Working Report Parameters Window must be or include a Saturday for an Approved Biweekly Progress Report to be generated.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

06/01/2001 **Approved Bi-weekly Progress Reports** Page 1 of 51

between 05/01/2001 and 06/01/2001

PCEMS	Project Nbr	WPR Nbr	Week 1 Period End	WPR Period End	Work Begin	Work Complete	Percent Complete	Contractor	Worked W1	Worked W2	Exempt W1	Exempt W2
018S	BRF 6176(4)	1	05/12/2001	05/19/2001	05/09/2001		16.88%	SWINGEN CONSTRUCT CO	Y	Y	N	N
								Newman Signs Inc	Y	N	N	N
019M	PH 0085(00)55	3	04/28/2001	05/05/2001	04/12/2001	05/10/2001	95.89%	ENERGY ELECTRIC CO	Y	Y	N	N
019M	PH 0085(00)55	4	05/12/2001	05/19/2001	04/12/2001	05/10/2001	96.39%	ENERGY ELECTRIC CO	Y	N	N	N
0476	P 1014(11)49	26	04/28/2001	05/05/2001	05/15/2000		88.76%	ZANDSTRA CONSTRUCT INC	Y	Y	N	N
								AMS Surface Inc	N	N	N	N
								Heavy Constructors Inc	N	N	N	N
								Hills Materials Company	N	N	N	N
								Hilt J H Engineering Inc	N	N	N	N
								Jensen Construction Inc	N	Y	N	N
								MLS Const Inc	N	N	N	N
								NJS Engineering	N	Y	N	N
								RHS Inc	N	N	N	N
								Spearfish Fencing Co Inc	N	N	N	N
								Upper Plains Contracting Inc	N	N	N	N

Contract Weather Report

The Contract Weather Report is reached through the menu path: **Reports, Biweekly Progress Reports, Weather Report**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides overview information about the weather recorded for the specified contract between the specified dates. The report opens with the Contract Weather Report Parameters Window, allowing users to specify the contract as well as beginning and end dates for the Contract Weather Report to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Contract Weather Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Construction Measurement and Payment Weather Report

06/06/2001
Page 1 of 2

For Contract 288 from 07/02/1999 to 10/01/1999

Contract Day:	Weather Description:
07/02/1999	Partly Cloudy Warm Temp H 76 L 62 Wind 5 - 15
07/03/1999	
07/04/1999	
07/05/1999	
07/06/1999	Warm Sunny Temp H 84 L 53 Wind 5-10 MPH
07/07/1999	Hot Humid Sunny Temp H 88 L 62 Wind 5-15 MPH
07/08/1999	Mostly Cloudy Hot Humid Windy Temp H 86 L 73 Wind 15-30 MPH
07/09/1999	Cloudy Cool Windy Temp H 76 L 56 Wind 15-30 MPH
07/10/1999	
07/11/1999	
07/12/1999	Sunny Warm Light Wind Temp H 79 L 60 Wind 5-15 MPH
07/13/1999	Sunny Hot Light Wind Temp H 88 L 58 Wind 5-10 MPH
07/14/1999	Sunny Hot Humid Temp H 90 L 67 Wind 15-25 MPH

Working Day Cover Letter Report

The Working Day Letter Report is reached through the menu path: **Reports, Biweekly Progress Reports, Working Day Cover Letter**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides the standard cover letter for the specified biweekly progress report. The report opens with the Working Day Letter Report Parameters Window, allowing users to specify the contract and report to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Working Day Letter Report.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Department of Transportation

Winner Area Office

P. O. Box 771
Winner, SD 57580-0771 605/842-0810
FAX: 605/842-0611

June 14. 2001

To: CARLSON, JOHN A INC
PO BOX 1832
WINNER, SD 57580-1832

RE: P 0044(14)119, JACKSON County
ASPHALT CONCRETE RESURFACING, FLATTENING SLOPES ON APPROACHES
PCEMS No. 4827

Enclosed herewith, please find the 'Bi-Weekly Progress Report' which designates the working days charged to the above referenced project for the period ending 5/15/1999.

Please comply with the specifications, Section 8.6, wherein it specifies that you will be allowed one (1) week in which to file a written protest setting forth in what respect said Bi-Weekly statement is incorrect, otherwise, the statement shall be deemed to have been accepted by you as correct.

If an agreement cannot be obtained, this office will refer the statement in question to the Region Engineer for his review and final decision.

Sincerely,

_____
Area Engineer

Biweekly Day Count Report

The Biweekly Day Count Report is reached through the menu path: **Reports, Biweekly Progress Reports, Biweekly Day Count**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides information about the weather, the working days assessed, the penalty days assessed, and the contract phase as recorded in the specified biweekly progress report. The report opens with the Biweekly Day Count Report Parameters Window, allowing users to specify the contract and report number for the Biweekly Day Count Report to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Biweekly Day Count Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by typing **Alt + R**. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

DOT-206 (7/01)

SOUTH DAKOTA DEPARTMENT OF TRANSPORTATION
BIWEEKLY DAY COUNT

08/17/2001
Page 1 of 1

Project No. IM 29-2(9)61 **Contractor** JENSEN, IRVING F CO INC
PCEMS No. 5360 **Two Week Period Ending** August 4, 2001
County LINCOLN **Type of Work** GRADING, CRC PAVEMENT, BRIDGE DECK OVLY & APP MOD, GUARD RAIL & CULV
Bi-Weekly Progress Report No. 8

Day	Date	Working Day #	Penalty Day #	Phase	Weather and Comments
Sun	07/22/2001				Partly Cloudy. Overcast and showers in AM. Precip. received = 0.25" - Temp: H 88 L 71 - Wind: H 20 L 10
Mon	07/23/2001				Partly Cloudy. Overcast and showers in AM. Precip. received = 2.36" Mostly Clear in PM. - Temp: H 90 L 71 - Wind: H 25 L 10
Tue	07/24/2001				Morning thunderstorms moved through area. Balance of day partly cloudy. Precip. receive = - Temp: H 76 L 64 - Wind: H 25 L 10
Wed	07/25/2001				Cloudy, Humid and Hazy. - Temp: H 82 L 60 - Wind: H 20 L 10
Thur	07/26/2001	34.5			Partly Cloudy, Humid and Hazy. - Temp: H 78 L 66 - Wi: H 20 L 10
Fri	07/27/2001	35.5			Cloudy, Humid and Hazy - Temp: H 78 L 66 - Wind: H 20 L 10
Sat	07/28/2001				Partly Cloudy - Temp: H 84 L 59 - Wind: H 15 L 5
Sun	07/29/2001				Partly Cloudy. - Temp: H 89 L 68 - Wind: H 25 L 15
Mon	07/30/2001	36.5			Cloudy and Hazy in AM. Mostly Clear in PM. Very Hot and Humid. - Temp: H 90 L 73 - Wind H 25 L 10
Tue	07/31/2001	37.5			Mostly Clear. Hot and Humid. - Temp: H 94 L 79 - Wind: H 30 L 20
Wed	08/01/2001	38.5			Cloudy AM. Clear PM. Humid. - Temp: H 86 L 71 - Wi: H 20 L 5
Thur	08/02/2001	39.0			Overcast, Rain Showers in AM.
Fri	08/03/2001	40.0			Hot and Humid Temp: H 90's L 70's - Wind : H 20 L 15
Sat	08/04/2001				Hot and Humid Temp: H 90's L 70's - Wind: H 20 L 10

Totals for Two Week Period

	Assessed Day Qty	Penalty Day Qty
Contract	6.5	0.0

Abbreviations: IW - Inclement Weather LH - Legal Holiday S - Sunday

I hereby certify that the above number of days counted is correct.

cc: Area Engineer
Contractor

Sioux Falls Area Engineer

Subcontractor Reports

Subcontractor Sublets

The Subcontractor Sublets Report is reached through the menu path: **Reports, Subcontractor, Subcontractor Sublets**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. The Subcontractor Sublets Report contains a listing of all work being sublet by the subcontractor specified in the Subcontractor Sublet Report Parameters Window's subcontractor field. This report contains each contract's Contract Number, Sublet Percent, Main Project Number, Main PCEMS Number, Original Contract Amount, Area Office and Contract Status. The report opens with the Subcontractor Sublet Report Parameters Window, allowing users to specify the subcontractor to display. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Subcontractor Sublets Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

06/01/2001 **South Dakota Department of Transportation** Page 1 of 2

Sublet contracts for Upper Plains Contracting Inc

Contract	Sublet Pct	Main Proj Nbr	Main PCEMS Nbr	Orig Contract Amt	Area	Contract Status
47	1.36%	P 1014(09)42	0475	$8,554,386	Rapid City Area	* Finaled *
55	1.43%	IM 029-1(95)0	4252	$8,126,548	Yankton Area	Open
63	18.92%	P 0034(102)341	3553	$4,462,730	Mitchell Area	Open
67	0.30%	BRFNH 0281(44)14	3574	$2,237,373	Huron Area	* Finaled *
70	6.09%	NH 0018(13)74	4985	$1,902,400	Custer Area	* Finaled *
79	3.76%	IM 90-2(94)101	5354	$1,646,346	Rapid City Area	* Finaled *
86	2.89%	P 0045(19)27	2747	$2,383,647	Winner Area	* Finaled *
89	4.45%	P 0018(24)373	4475	$1,841,598	Yankton Area	* Finaled *
103	0.77%	P 4310(10)	3658	$1,157,138	Watertown Area	* Finaled *
149	4.81%	P 0020(69)164	4818	$3,031,597	Mobridge Area	* Finaled *
162	5.22%	NH 0281(17)153	5379	$3,597,987	Aberdeen Area	* Finaled *
174	14.00%	P 0010(44)321	3892	$3,909,068	Aberdeen Area	Open

Subcontractor Mailing Labels

The Subcontractor Mailing Labels Report is reached through the menu path: **Reports, Subcontractor, Subcontractor Mailing Labels**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report provides a label printout containing contractors and their addresses. The report opens with the Subcontractor Mailing Labels Parameters Window, allowing users to specify the states to include in the report. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select another Subcontractor Mailing Labels Report to view.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

CONSOLIDATED READY-MIX P O BOX 272 WATERTOWN, SD 57201-0272	CUNDY ASPHALT PAVING CONSTRUCTION INC P O BOX 2469 GILLETTE, WY 82717-2469
CONSTRUCTION SERVICES 101 W 26TH ST SIOUX FALLS, SD 57105	CVD CONSTRUCTION 514 S 32ND STREET SPEARFISH, SD 57783
CONSTRUCTION SIGNING CORP 111 GARFIELD AVE SIOUX FALLS, SD 57104-5676	D & W CRANE/RIGGING, INC P O BOX 493 RAPID CITY, SD 57793
CONTECH CONSTRUCTION PRODUCTS 3701 W 49TH ST STE 200C SIOUX FALLS, SD 57106-4209	D & G CONCRETE CONSTRUCTION INC 1408 E 39TH ST N SIOUX FALLS, SD 57104-0835
CONTRACTORS STEEL CORP P O BOX 1696 DES MOINES, IA 50306-1696	DACOTAH CEMENT P O BOX 360 RAPID CITY, SD 57709-3060

Standard Bid Item Reports

Standard Bid Item Payment Categories

The Standard Bid Item Payment Categories Report is reached through the menu path: **Reports, Standard Bid Item, SBI Payment Categories**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists the Standard Bid Item Payment Categories and contains breakdowns of the SBI numbers within each category. The report opens directly as shown below. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

06/01/2001 **Standard Bid Item Payment Categories** Page 1 of 3

Category 1 - Structures

250.0004 — 250.0005
250.5004 — 250.5005
250E0004 — 250E0005
250E5004 — 250E5005
411.0001 — 412.5012
411E0001 — 412E5012
440.0001 — 450.8669
440E0001 — 450E8669
460.0004 — 490.5242
460E0004 — 490E5242
500.0001 — 570.5003
500E0001 — 570E5003
630.0001 — 630.5500
630E0001 — 630E5500

Category 2 - Grading

100.0001 — 100.5006
100E0001 — 100E5006
120.0001 — 120.5093
120E0001 — 120E5093
200.5006 — 240.5002

Standard Bid Items Exceptions Report

The Standard Bid Items Exceptions Report is reached through the menu path: **Reports, Standard Bid Item, SBI Exceptions**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists the Standard Bid Item numbers not fitting into any payment categories that have been used on contracts, along with their project and PCEMS numbers. The report opens directly as shown below. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

06/01/2001 **Standard Bid Item Exception Report** Page 1 of 30

Sbi(s) which do not fall within a payment category group

No match found for SBI '120E6100' on project P 0044(00)280 and pcems 551M
No match found for SBI '120E6200' on project P 0044(00)280 and pcems 551M
No match found for SBI '634E0010' on project P 0044(00)280 and pcems 551M
No match found for SBI '250.0001' on project PH 0037(00)72 and pcems 180M
No match found for SBI '110E6230' on project IM 90-2(00)101 and pcems 3942
No match found for SBI '110E6300' on project IM 90-2(00)101 and pcems 3942
No match found for SBI '110E7700' on project IM 90-2(00)101 and pcems 3942
No match found for SBI '250E0010' on project IM 90-2(00)101 and pcems 3942
No match found for SBI '410E2220' on project IM 90-2(00)101 and pcems 3942
No match found for SBI '410E2300' on project IM 90-2(00)101 and pcems 3942
No match found for SBI '634E0010' on project IM 90-2(00)101 and pcems 3942
No match found for SBI '634E0010' on project 0443-391 and pcems 453M
No match found for SBI '634E0020' on project 0443-391 and pcems 453M
No match found for SBI '634E0010' on project 2713-371 and pcems 446M
No match found for SBI '634E0020' on project 2713-371 and pcems 446M
No match found for SBI '250E0020' on project BRF 6315(4) and pcems 033S
No match found for SBI '250E0030' on project BRF 6315(4) and pcems 033S
No match found for SBI '250E0030' on project BRO 8006(1) and pcems 5696
No match found for SBI '380E6000' on project IM 90-1(00)38 and pcems 559M
No match found for SBI '380E6110' on project IM 90-1(00)38 and pcems 559M
No match found for SBI '634E0010' on project IM 90-1(00)38 and pcems 559M
No match found for SBI '634E0010' on project IM 90-4(00)198 and pcems 153M

Percentage of Contract Amount by Payment Category Report

The Percentage of Contract Amount by Payment Category Report is reached through the menu path: **Reports, Standard Bid Item, Pct of Contract Amount by Payment Category**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists the project, PCEMS, and Control Reference numbers for all contracts currently in CM&P, then the ten categories' percentage amounts of each contract's totals, as well as estimated and calculated totals. The report opens directly as shown below. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**. This information can be sorted specifically by project number, PCEMS number, control reference number, or original contract amount.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Percent of Total Contract Amount by Payment Category

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Project	PCEMS	Control Ref	#1	#2	DELETION OF COLUMNS #3 - #7	#8	#9	#10	Estimated Total	Calculated Total
0023-003	086M		0.00%	0.00%		0.00%	0.00%	8.50%	$262,314.25	$246,252.24
0154-171	I111		0.00%	0.00%		0.00%	0.00%	36.94%	$8,631.54	$12,815.73
3552G	377M		0.00%	0.00%		0.00%	0.00%	100.00%	$118,500.00	$236,000.00
P 0044(00)280	551M	280	0.00%	69.38%		0.00%	0.00%	7.62%	$211,847.80	$255,242.80
PH 0037(00)72	180M	72	0.00%	0.00%		0.00%	0.00%	12.68%	$111,210.80	$118,784.80
IM 90-2(00)101	3942		83.20%	3.47%		0.00%	0.00%	7.66%	$796,374.50	$1,164,909.00
0443-391	453M		0.00%	0.00%		0.00%	0.00%	11.21%	$42,982.50	$64,208.20
2713-371	446M		0.00%	0.00%		0.00%	0.00%	15.98%	$16,786.00	$25,025.60
BRF 6315(4)	033S		66.60%	26.77%		0.00%	0.00%	4.86%	$91,630.70	$163,714.00
BRO 8006(1)	5696		75.53%	20.92%		0.00%	0.00%	3.23%	$316,658.55	$589,040.90
IM 90-1(00)38	559M		0.00%	0.67%		0.00%	0.00%	2.67%	$652,761.00	$561,230.00
IM 90-4(00)198	153M		0.00%	0.00%		0.39%	0.00%	3.88%	$659,721.90	$1,236,602.00

Visual Inspection Reports

Summary of Requirements for Visual Inspection Report

The Summary of Requirements for Visual Inspections Report is reached through the menu path: **Reports, Visual Inspection, Visual Inspection Requirements**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists the identifying information and numbers for the contract and project(s), the type of work, the contractor, the engineer, and the location in the header. Then it displays each material requiring a visual inspection, their quantities, and their requirement status. The report opens directly for the currently selected contract as shown below. Clicking on the **Report Parameters Button** allows users to select any contract's Visual Inspections Summary Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

Summary of Requirements for Visual Inspections

Contract: 288 **Date Let:** 05/19/1999
PCEMS: 032S
Project(s): BRF 6525(01)
County: BROWN
Location: STR. ON CO. RD. 1.0.N. & 1.4 E. OF RICHMOND OVER RICHMOND LAKE SPILLWAY
Type of Work: STRUCTURE AND APPROACH GRADING (124' REINFORCED CONCRETE BRIDGE)
Contractor: GRAVES CONSTRUCTION CO INC **Length:** 0.2 miles
Engineer: David Wick **Area:** Aberdeen Area

Material	Quantity	Unit	Reqd	Made	Requirement
120 BORROW UNCLASS EXCAVATION	143.400	CuYd			
			144	2	Visual Inspection (DOT - 25) for Certification
250 INCIDENTAL WORK (STRUCTURE):	19,500.000	LS			
			1	1	Visual Inspection (DOT - 25) for Certification
460 CLASS A45 CONCRETE, BRIDGE	82.000	CuYd			
460 CLASS A40 CONCRETE, MISC.	37.900	CuYd			
460 CLASS A45 CONC, BRIDGE DECK	152.300	CuYd			
CEMENT TYPE II (IF CERT MILL)	272.200				
			1	4	Visual Inspection (DOT - 25) for Acceptance
			1	0	Visual Inspection (DOT - 25) for Acceptance
470 TYPE 115 BRIDGE RAILING	280.000	LF			
W8 X 31 POSTS (A-709, GR. 36)			1	0	Visual Inspection (DOT - 25) for Acceptance
			1	0	Visual Inspection (DOT - 25) for Acceptance

Visual Inspections Summary Report

The Visual Inspections Summary Report is reached through the menu path: **Reports, Visual Inspection, Visual Inspection Summary**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists the contract number, type of work, contractor, engineer, location, letting date, length and area in the header. Then it displays each material requiring a visual inspection, their quantities and requirement status. The report opens directly for the currently selected contract as shown below.

Clicking on the **Report Parameters Button** allows users to select any contract's Visual Inspections Summary Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

12/06/2001 **VISUAL INSPECTION SUMMARY** Page 1 of 4

COUNTY: CUSTER **CUSTER AREA ENGINEER:** Don Kraus

PROJECT: P-PH0036(8)36 **PCEMS:** 2742 **CONTRACT:** 790

460 18" CMP 16 Gauge, Furnish (Tier 2)	Quantity: 1,312.000	Unit: Ft	Inspections Required = 1
460 24" CMP 16 Gauge, Furnish (Tier 2)	Quantity: 392.000	Unit: Ft	Inspections Required = 1
460 30" CMP 16 Gauge, Furnish (Tier 2)	Quantity: 66.000	Unit: Ft	Inspections Required = 1
460 24" CMP Elbow, Furnish (Tier 2)	Quantity: 12.000	Unit: Each	Inspections Required = 1
460 24" CMP Flared End, Furnish (Tier 2)	Quantity: 7.000	Unit: Each	Inspections Required = 1
460 18" CMP Safety End, Furnish (Tier 2)	Quantity: 48.000	Unit: Each	Inspections Required = 1
460 24" CMP Safety End, Furnish (Tier 2)	Quantity: 4.000	Unit: Each	Inspections Required = 1
460 30" CMP Safety End, Furnish (Tier 2)	Quantity: 2.00	Unit: Each	Inspections Required = 1
460 18" CMP Arch 16 Gauge, Furnish (Tier 2)	Quantity: 64.000	Unit: Ft	Inspections Required = 1
460 24" CMP Arch 16 Gauge, Furnish (Tier 2)	Quantity: 164.000	Unit: Ft	Inspections Required = 1
460 18" CMP Arch Safety End, Furnish (Tier 2)	Quantity: 4.000	Unit: Ft	Inspections Required = 1
460 24" CMP Arch Safety End, Furnish (Tier 2)	Quantity: 8.000	Unit: Ft	Inspections Required = 1

Record of Visual Inspection and Field Measurements (DOT - 25)

The Record of Visual Inspection and Field Measurements Report is reached through the menu path: **Reports, Visual Inspection, Record of Visual Inspection (DOT – 25)**. The Reports toolbar displays beneath the Frame Window Toolbar to aid users in navigating within the report, modifying the information displayed in the report, printing the report, or selecting another report of the same type. This report lists the project, county, PCEMS number, inspector, area engineer, and material in the header. Then it displays the visual inspection's date and recorded information. The report opens with the Visual Inspection Parms (Parameters) Window, allowing users to specify the contract and the material to include in the report. Once generated, the report displays as shown below. Clicking on the **Report Parameters Button** allows users to select any contract's Record of Visual Inspection Report to view. The information in this report can be filtered and/or sorted using the **Filter Button** and the **Sort Button**.

Users can view report information on the screen. Printing should be reserved for instances when a paper copy is necessary.

The Reports menu can also be accessed by simultaneously typing ALT + R. The specific report option(s) can then be selected by typing the underlined letter(s) in the appropriate name(s) or by using the arrow keys to move over and/or down.

DOT - 25
(09/2001)

RECORD OF VISUAL INSPECTION AND FIELD MEASUREMENTS

File #_____

PROJECT: P-PH0036(8)36 **COUNTY:** CUSTER **PCEMS:** 2742

INSPECTED BY: Brett Rice **CUSTER AREA ENGINEER:** Don Kraus

MATERIAL: W Beam Guardrail Tangent End Terminal

List items and date inspected along with other pertinent data, such as size, manufacturer, markings, measurements, weight, condition, etc., and the basis for acceptance or rejection.

DATE	
08//21/2001	All Material was inspected for the Tangent End Terminal as it was delivered to the project. I checked to make sure everything needed for proper assembly was delivered to the project and no parts were missing. Everything appeared in good shape and the terminal was installed according to the standard plate.

Inspector's Signature

Title

Date Submitted : _____

cc: Region Materials
Certification Engineer
File (original)

20. Administration Windows

Beyond the windows easily accessed by the CM&P Toolbar, there are many windows and functions that are available to administrative personnel or through the **Administration** menu item. These include the Management Notification Window, the Finance Notification Window, and the Finals Engineer Notification Window, as well as various subcontract and maintenance functions.

Management Notification Window Functions

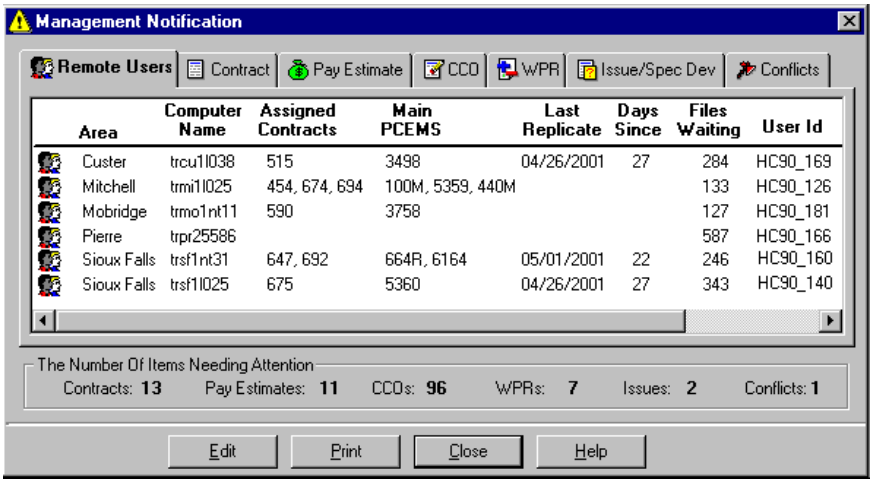
From the Management Notification Window, management personnel may directly access unapproved pay estimates, CCO's and WPR's across contracts to individually approve them, as well as directly access unassigned projects to assign them to project engineers. Other management functions available from the Management Notification Window include viewing remote users who haven't replicated recently, and viewing and accessing contract issues and specification deviations.

Review Remote Users Late for Replication

To review remote users late for replication through the Management Notification Window, perform the following steps.

1. (If attempting this procedure at some other instance than initial logon when the Management Notification Window displays automatically as appropriate to user group,) follow the menu path: **Administration**, **Management Notification**.

   The Management Notification Window appears, displaying the **Remote Users Tab**.



2. Review the desired remote user information.

3. Click on the **Close Button** Close.

Assign a Project Engineer to a Contract through the Management Notification Window

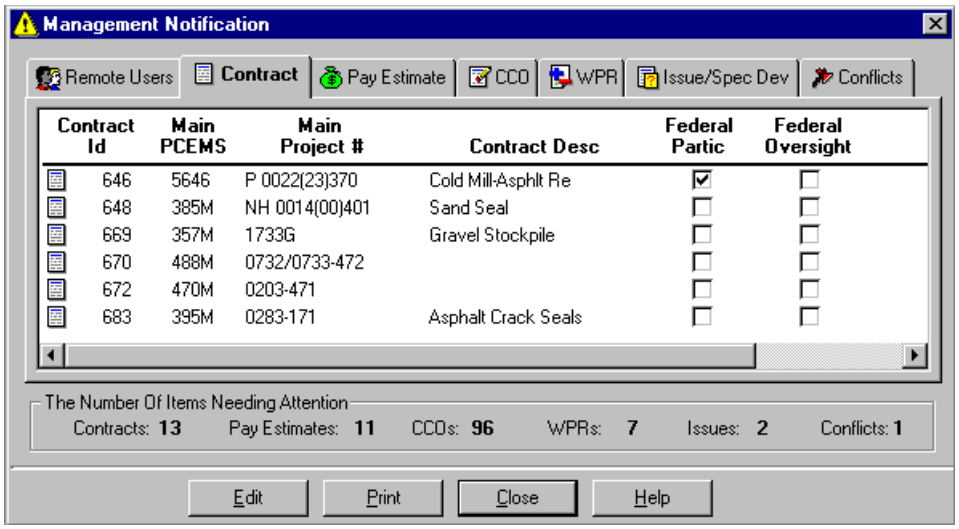
To assign a project engineer to a contract through the Management Notification Window, perform the following steps.

1. (If attempting this procedure at some other instance than initial logon when the Management Notification Window displays automatically as appropriate to user group,) follow the menu path: **Administration**, **Management Notification**.

   The Management Notification Window appears.

2. Click on the **Contract Tab**.

   The Management Notification Window Contract Tab appears as shown below.

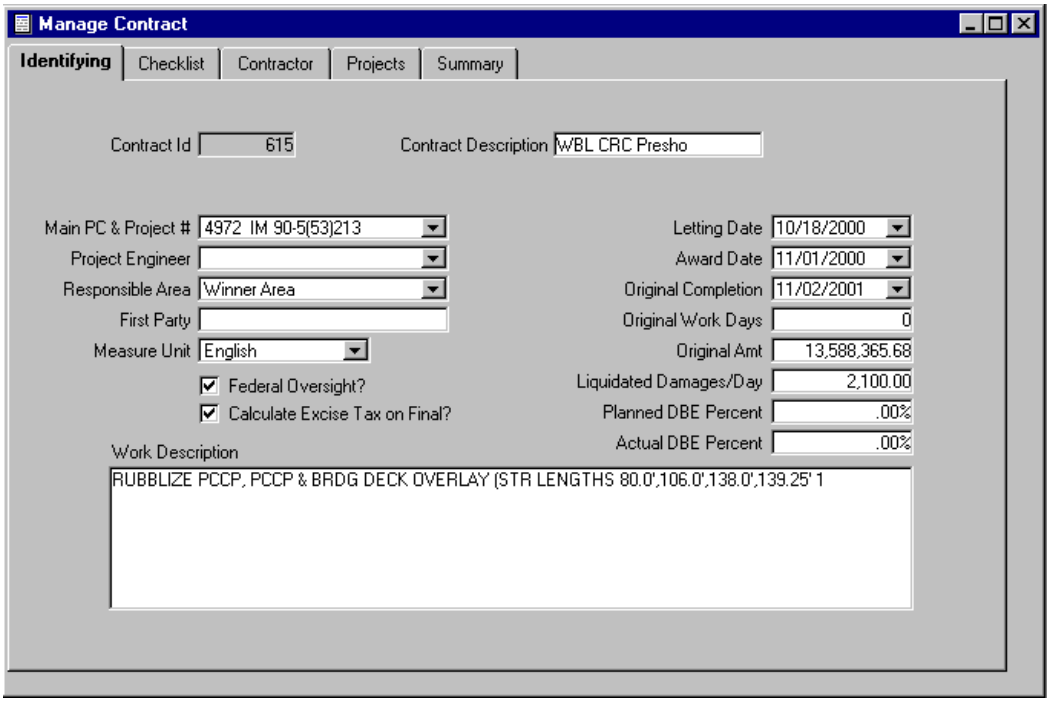


3. Locate and double click on the desired **contract.**

   OR

   Select (highlight) the desired **contract** and click on the **Edit Button** Edit.

The Manage Contract Window Identifying Tab for the selected contract appears as shown below.



4. Select (highlight) the appropriate name from the **Project Engineer** field's dropdown list.

5. Click on the **Save Button** .

6. Click on the **Close Button** .

   The Manage Contract Window Identifying Tab is closed, and CM&P returns to the Management Notification Window.

7. Repeat steps 3 – 6 as desired for other contracts.

Approve Pay Estimates through the Management Notification Window

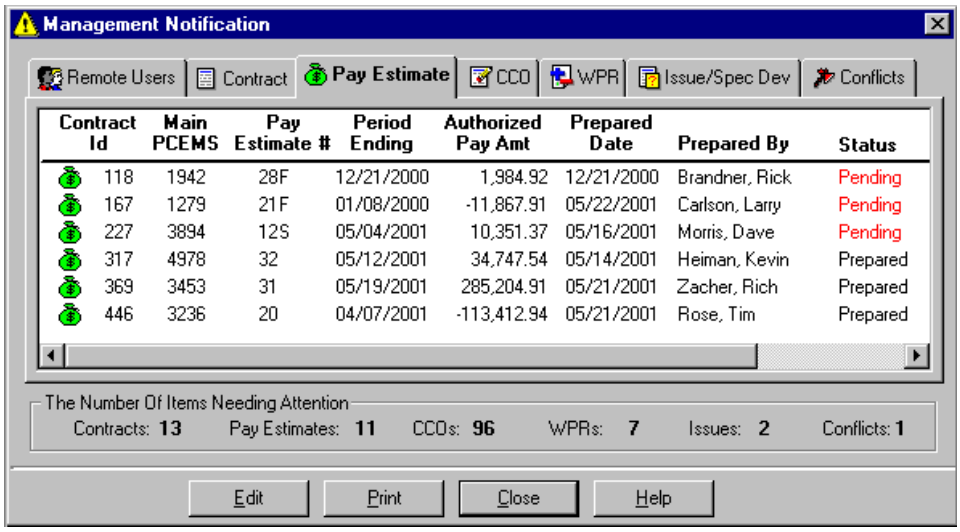
To approve pay estimates through the Management Notification Window, perform the following steps.

1. (If attempting this procedure at some other instance than initial logon when the Management Notification Window displays automatically as appropriate to user group,) follow the menu path: **Administration**, **Management Notification**.

   The Management Notification Window appears.

2. Click on the **Pay Estimate Tab**.

   The Management Notification Window Pay Estimate Tab appears as shown below.

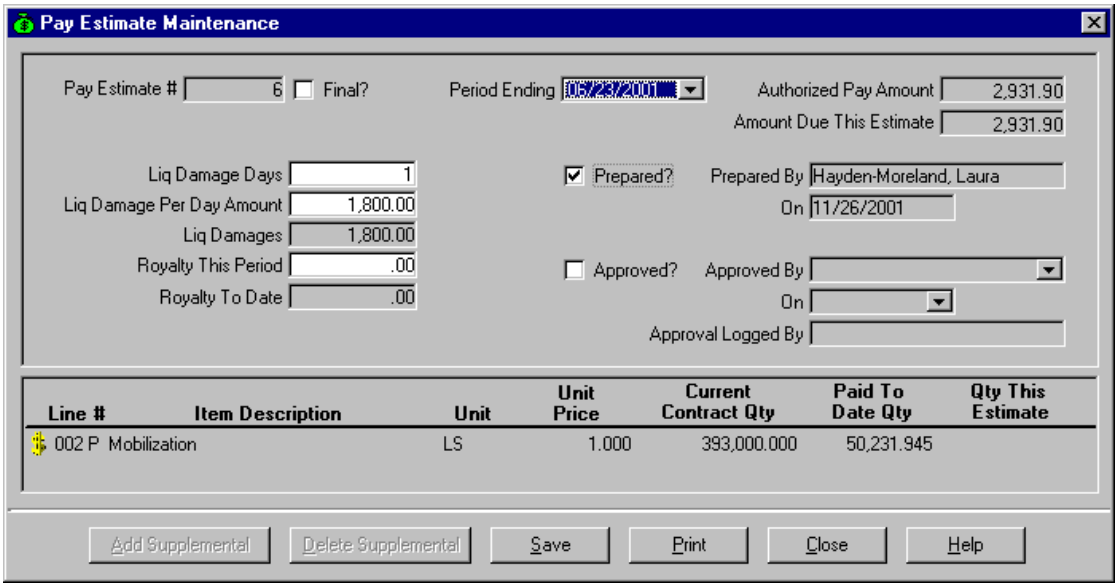


3. Locate and double click on the desired **pay estimate.**

   OR

   Select (highlight) the desired **pay estimate** and click on the **Edit Button** [Edit].

The Pay Estimate Maintenance Window appears as shown below.



4. Click on the **Approved?** checkbox.
5. Choose the appropriate information from the dropdown options for the **Approved By** and **On** fields.

   The name of the person currently logged on is automatically entered in the **Approval Logged By** field.

> The **Prepared?** field must be completed before approval information can be entered.

6. Click on the **Save Button** Save at the bottom of the window.
7. Click on the **Close Button** Close at the bottom of the window.

   CM&P returns to the Management Notification Window.
8. Repeat steps 3 – 7 as desired for other pay estimates.

Approve CCO's through the Management Notification Window

> CCO's cannot be approved through the Mobile CM&P Application. Users must be logged onto the Desktop Application to perform this function.

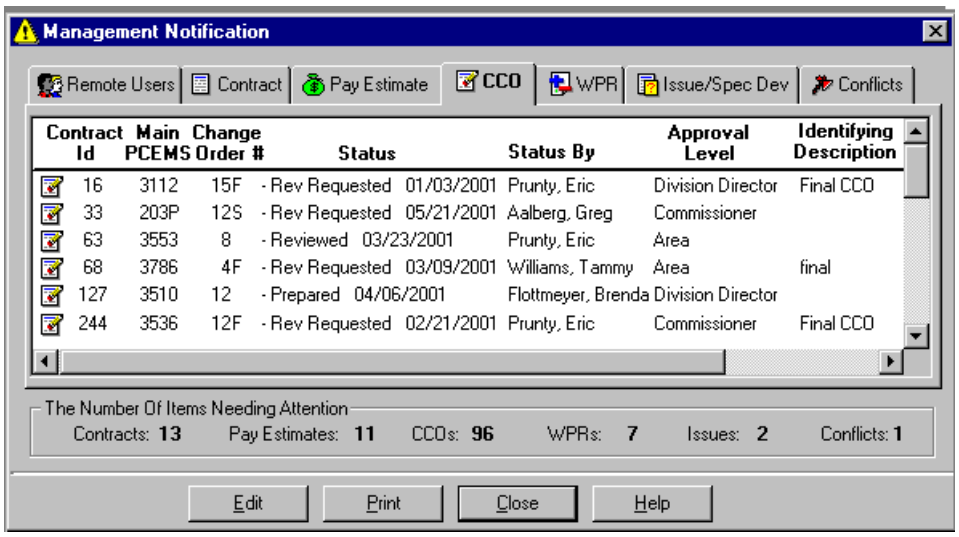
To approve contract change orders through the Management Notification Window, perform the following steps.

1. (If attempting this procedure at some other instance than initial logon when the Management Notification Window displays automatically as appropriate to user group,) follow the menu path: **Administration**, **Management Notification**.

   The Management Notification Window appears.

2. Click on the **CCO Tab**.

   The Management Notification Window CCO Tab appears as shown below.

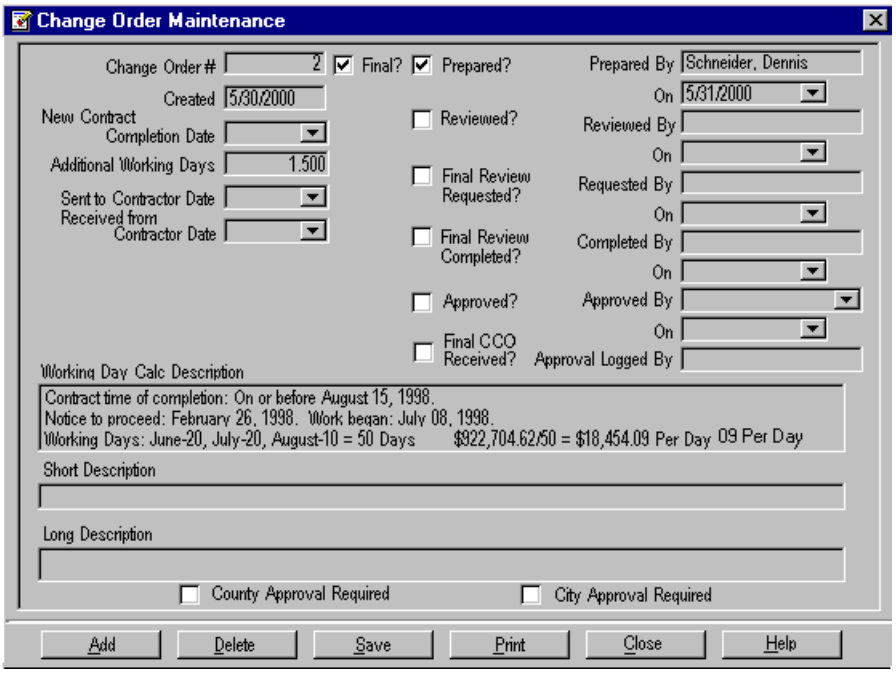


3. Locate and double click on the desired **contract change order.**

   OR

   Select (highlight) the desired **contract change order** and click on the **Edit Button** .

The Change Order Maintenance Window appears as shown below. The window contains the information recorded for the CCO selected.



4. Click in the **Approved?** checkbox.

   A checkmark appears in the checkbox. Information is also automatically entered in the **Approved By**, **On**, and **Approval Logged By** fields to the right of the checked box. Users can edit the information in the **Approved By** and **On** fields (by clicking on the downward-pointing arrow next to the field and selecting the proper information from the resulting dropdown list and calendar, respectively), but the information in the **Approval Logged By** field cannot be changed. The system obtains the name to put in this field from the name of the person who is currently logged on to the system.

> Users cannot mark a CCO as approved until it has been marked prepared. ALSO, users cannot approve a CCO if another, lower-numbered CCO has not yet been approved.

5. Click on the **Save Button** [Save] at the bottom of the window.

6. Click on the **Close Button** [Close] at the bottom of the window.

   The Change Order Maintenance Window is closed, and CM&P returns to the Management Notification Window.

7. Repeat steps 3 – 6 as desired for other contract change orders.

Approve WPR's through the Management Notification Window

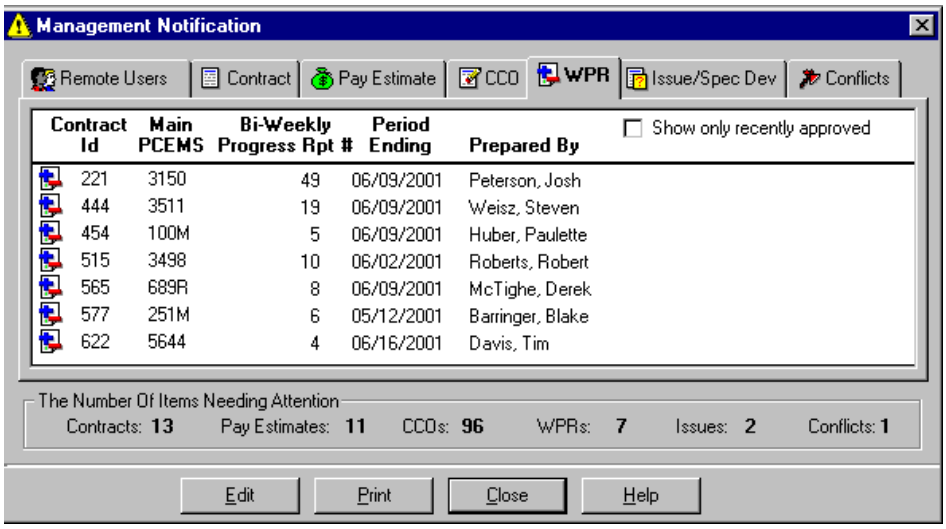
To approve biweekly progress reports through the Management Notification Window, perform the following steps.

1. (If attempting this procedure at some other instance than initial logon when the Management Notification Window displays automatically as appropriate to user group,) follow the menu path: **Administration**, **Management Notification**.

   The Management Notification Window appears.

2. Click on the **WPR Tab**.

   The Management Notification Window WPR Tab appears as shown below.

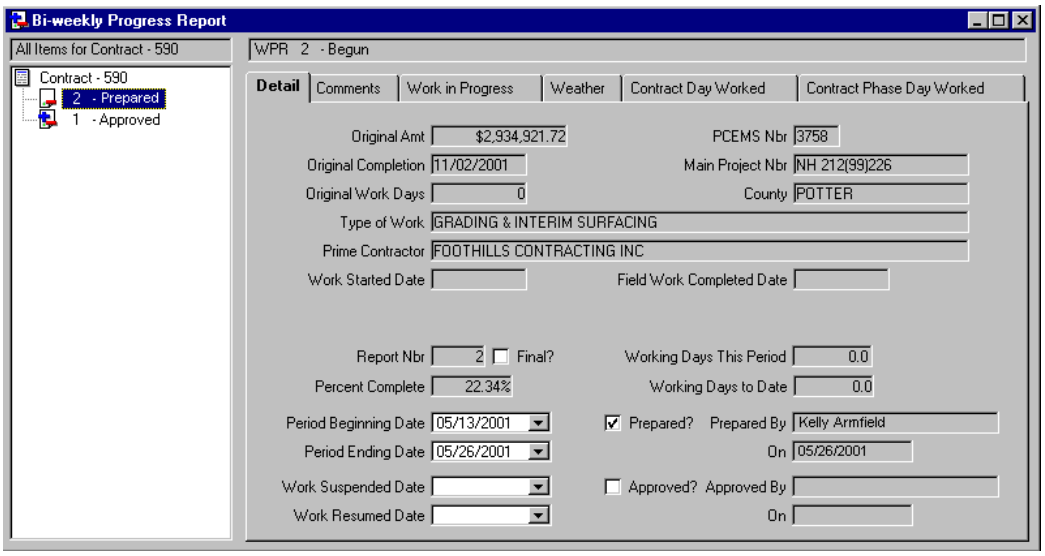


3. Locate and double click on the desired **biweekly progress report.**

   OR

   Select (highlight) the desired **biweekly progress report** and click on the **Edit Button** .

The Biweekly Progress Report Window appears as shown below. The window contains the information recorded for the WPR selected.



4. Click on the **Approved?** checkbox.

   A checkmark appears in the checkbox. Information is also automatically entered in the **Approved By**, and **On** fields to the right of the checked box.

5. Click on the **Save Button** .

6. Click on the **Close Button** .

   The Biweekly Progress Report Window is closed, and CM&P returns to the Management Notification Window.

7. Repeat steps 3 – 6 as desired for other biweekly progress reports.

Unapprove WPR's through the Management Notification Window

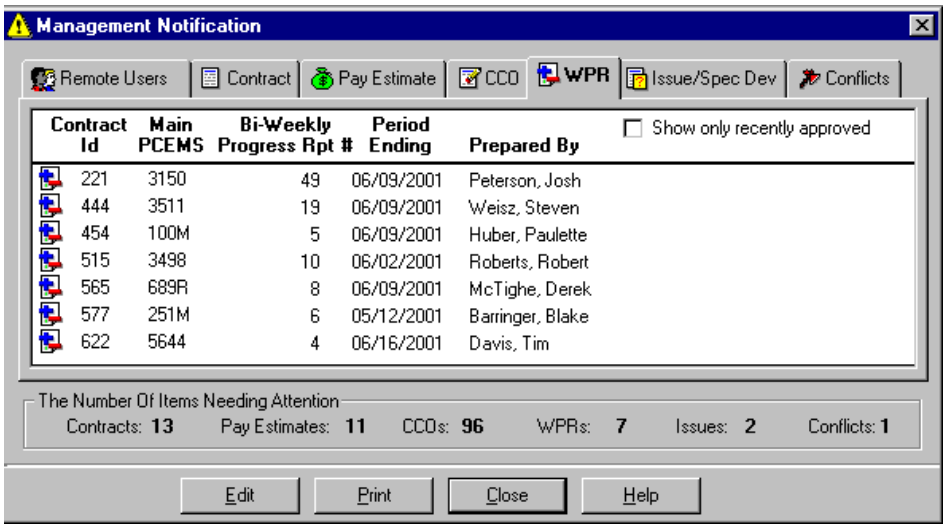
To unapprove biweekly progress reports through the Management Notification Window, perform the following steps.

1. (If attempting this procedure at some other instance than initial logon when the Management Notification Window displays automatically as appropriate to user group,) follow the menu path: **Administration**, **Management Notification**.

   The Management Notification Window appears.

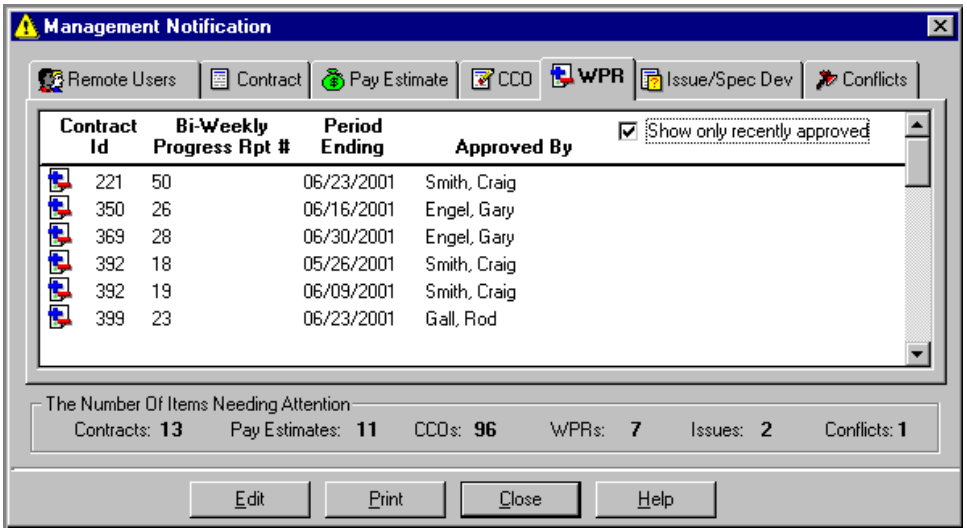
2. Click on the **WPR Tab**.

   The Management Notification Window WPR Tab appears as shown below.



3. Click on the **Show only recently approved** checkbox.

The Management Notification Window WPR Tab now appears as shown below.

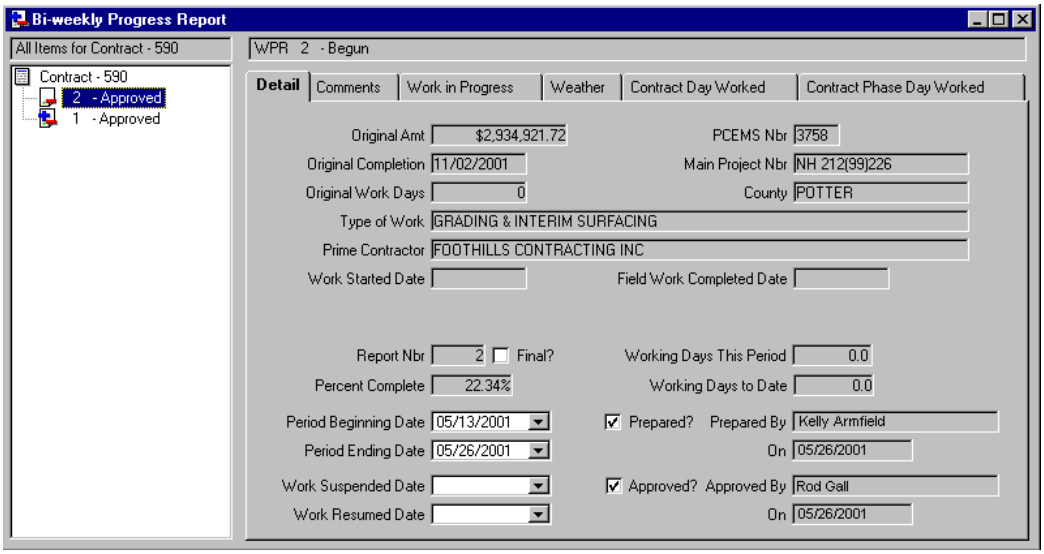


4. Locate and double click on the desired **biweekly progress report.**

   OR

   Select (highlight) the desired **biweekly progress report** and click on the **Edit Button** .

   The Biweekly Progress Report Window appears as shown below. The window contains the information recorded for the WPR selected.



5. Click on the **Approved?** checkbox.

   The checkmark disappears from the checkbox. Information in the **Approved By**, and **On** fields to the right of the checked box is also automatically erased.

6. Click on the **Save Button** .

7. Repeat steps 3 – 6 as desired for other biweekly progress reports.

8. Click on the **Close Button** .

   The Biweekly Progress Report Window is closed, and CM&P returns to the Management Notification Window.

Review All Contract Issues and Specification Deviations

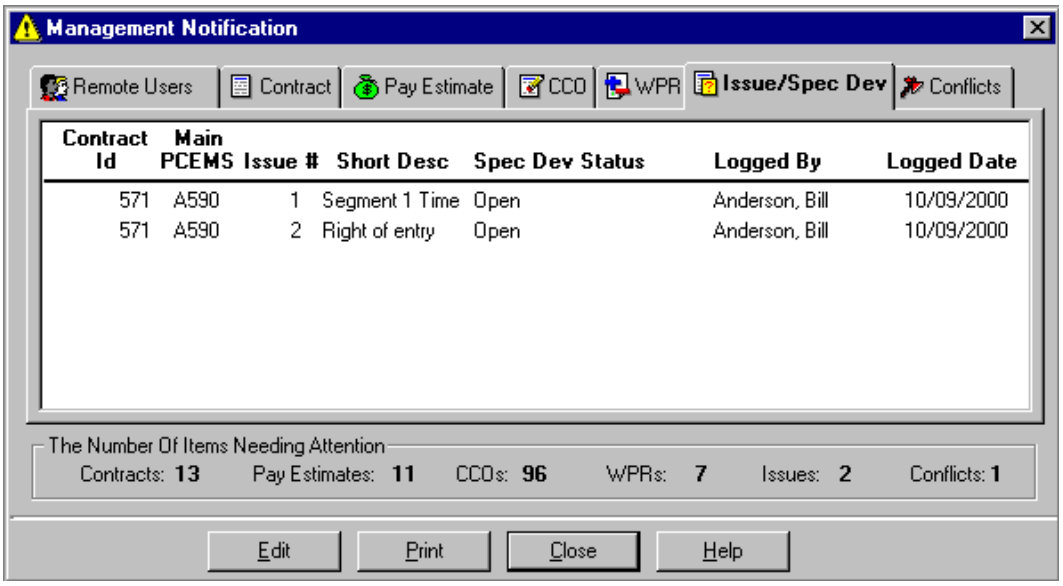
To review all contract issues and specification deviations through the Management Notification Window, perform the following steps.

1. (If attempting this procedure at some other instance than initial logon when the Management Notification Window displays automatically as appropriate to user group,) follow the menu path: **Administration**, **Management Notification**.

   The Management Notification Window appears.

2. Click on the **Issue/Spec Dev Tab**.

   The Management Notification Window Issue/Spec Dev Tab appears as shown below.

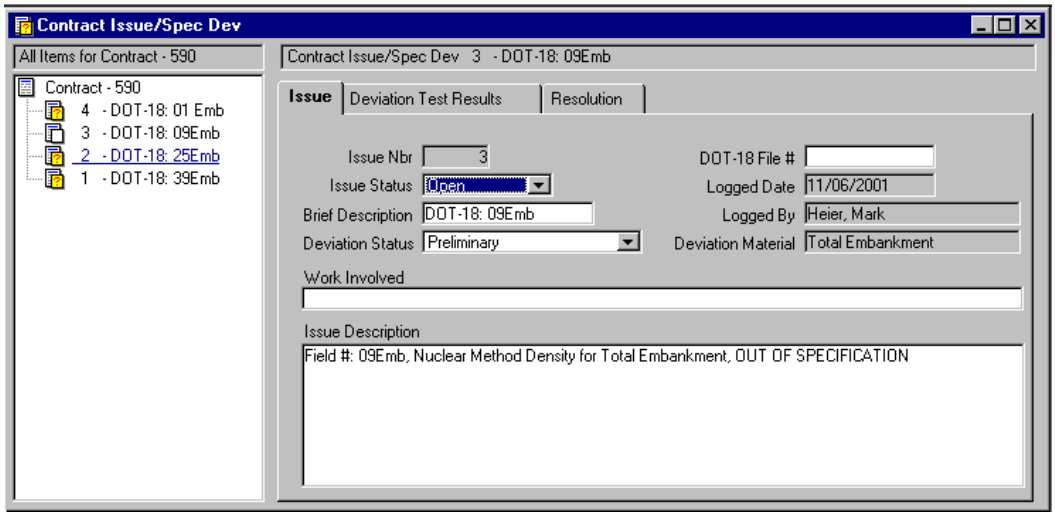


3. Locate and double click on the desired **issue.**

   OR

   Select (highlight) the desired **issue** and click on the **Edit Button** .

The Contract Issue - Specification Deviation Window's Issue Tab for the selected issue appears as shown below.



4. Review and/or edit the issue as appropriate.

5. If changes have been made, click on the **Save Button** .

6. Click on the **Close Button** .

   The Contract Issue – Specification Deviation Window Issue Tab is closed, and CM&P returns to the Management Notification Window.

7. Repeat steps 3 – 6 as desired for other issues.

Review All Conflicts in Contract Data

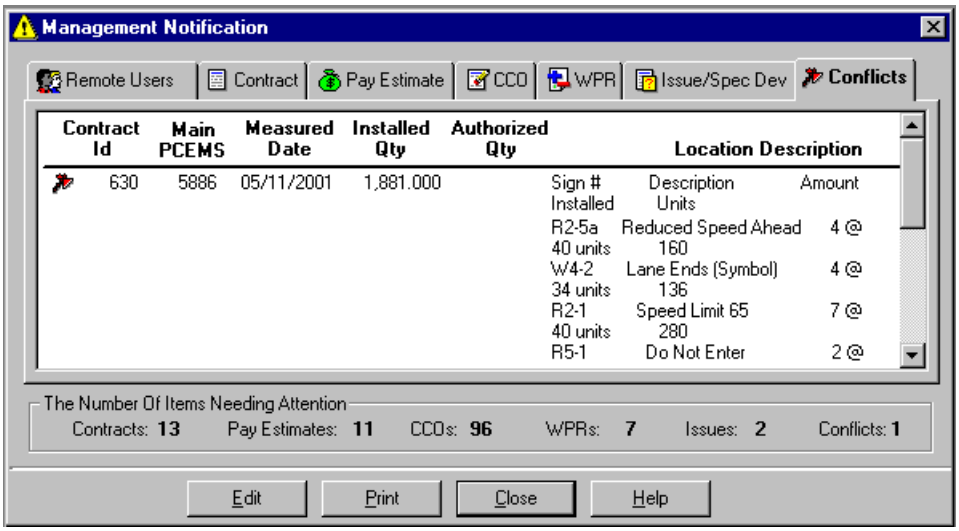
To review all conflicts in contract data through the Management Notification Window, perform the following steps.

1. (If attempting this procedure at some other instance than initial logon when the Management Notification Window displays automatically as appropriate to user group,) from the Administration menu item, select **Management Notification**.

   The Management Notification Window appears.

2. Click on the **Conflicts Tab**.

   The Management Notification Window Conflicts Tab appears as shown below.

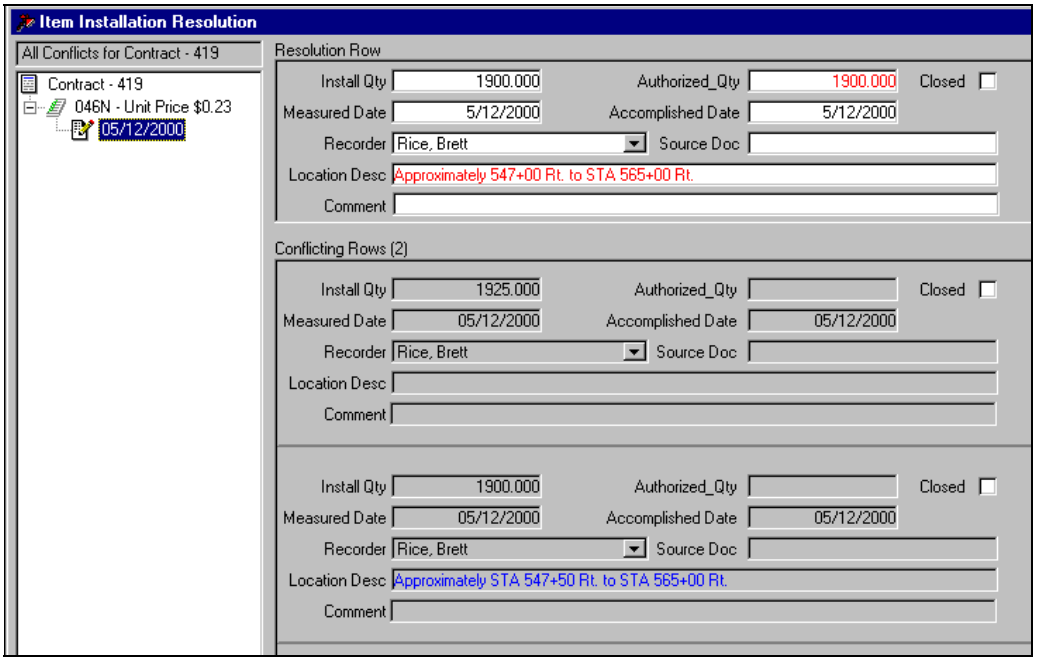


3. Locate and double click on the desired **conflict.**

OR

Select (highlight) the desired **conflict** and click on the **Edit Button** Edit.

The Item Installation Resolution Window for the selected contract appears as shown below.



4. Select (highlight) the correct data.

5. Click on the **Resolve Button** .

6. Click on the **Close Button** .

   The Item Installation Resolution Window is closed, and CM&P returns to the Management Notification Window.

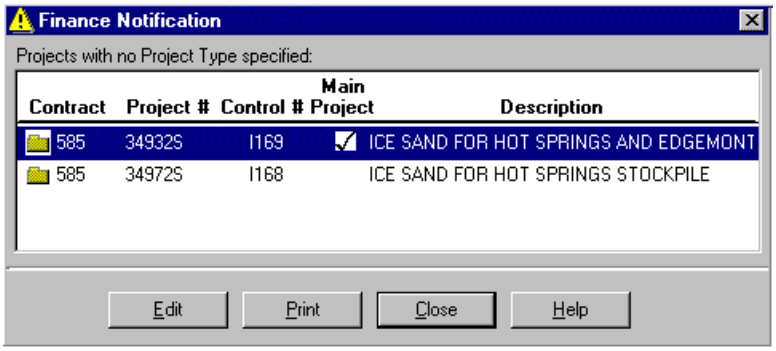
7. Repeat steps 3 – 6 as desired for other contracts.

Finance Notification Window Functions

The Finance Notification Window appears automatically for Financial Representatives, or can be reached through the menu path: **Administration**, **Finance Notification**. It allows users to quickly recognize projects that have no type specification and to edit their project information directly. To edit a project from the Finance Notification Window, perform the following steps.

1. (If attempting this procedure at some other instance than initial logon when the Finance Notification Window displays automatically as appropriate to user group,) follow the menu path: **Administration, Finance Notification**.

   The Finance Notification Window appears as shown below.

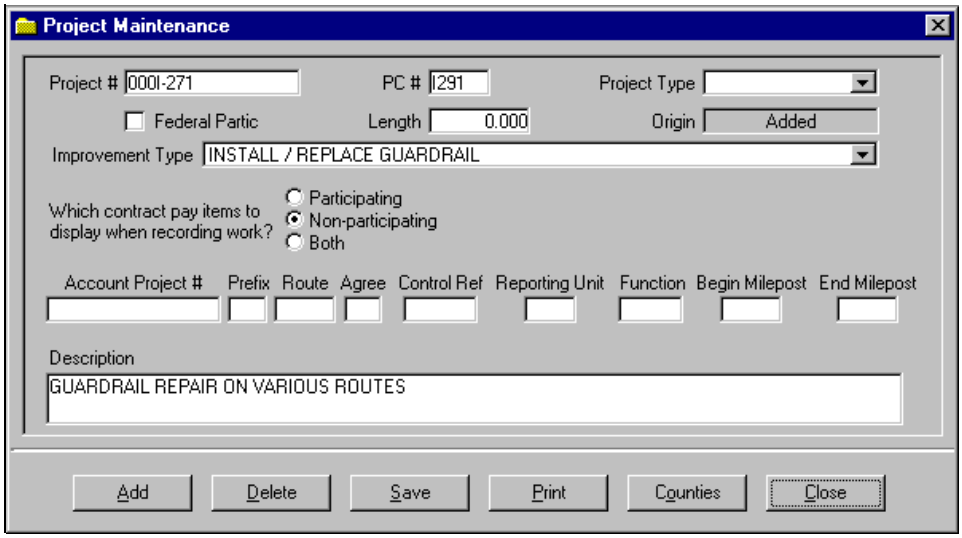


2. Locate and double click on the desired **project**.

OR

Select (highlight) the desired **project** and click on the **Edit Button** Edit.

The Project Maintenance Window appears as shown below.



3. Select the desired type information from the **Project Type** field's dropdown listing.
4. Click on the **Save Button** Save at the bottom of the window.
5. Click on the **Close Button** Close at the bottom of the window.

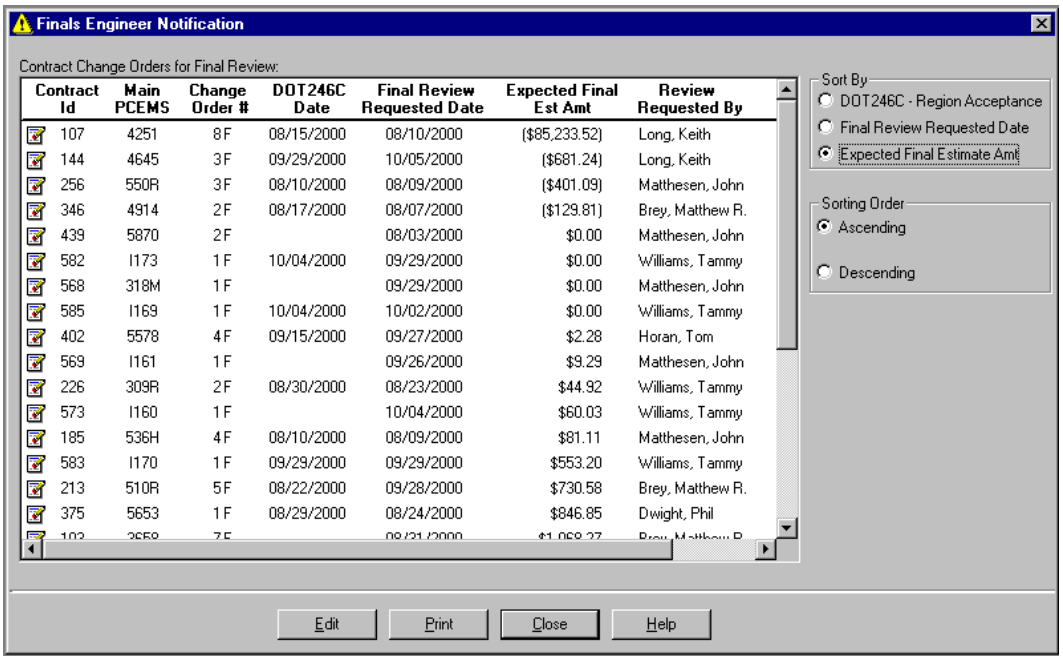
   CM&P returns to the Finance Notification Window.
6. Repeat steps 2-5 for other projects as desired.

Finals Engineer Notification Window Functions

The Finals Engineer Notification Window is reached through the menu path: **Goto, Finals Engineer Notification** and appears automatically for Finals Engineers at logon to provide them with an at-a-glance summary of final and supplemental CCO's to review across all contracts. From the Finals Engineer Notification Window, users can reach the Change Order Maintenance Window for each listed change order to mark it as Final Review completed. To mark contract change orders as final review completed through the Finals Engineer Notification Window, perform the following steps.

1. (If attempting this procedure at some other instance than initial logon when the Finals Engineer Notification Window displays automatically as appropriate to user group,) follow the menu path: **Administration**, **Finals Engineer Notification**.

   The Finals Engineer Notification Window appears as shown below.

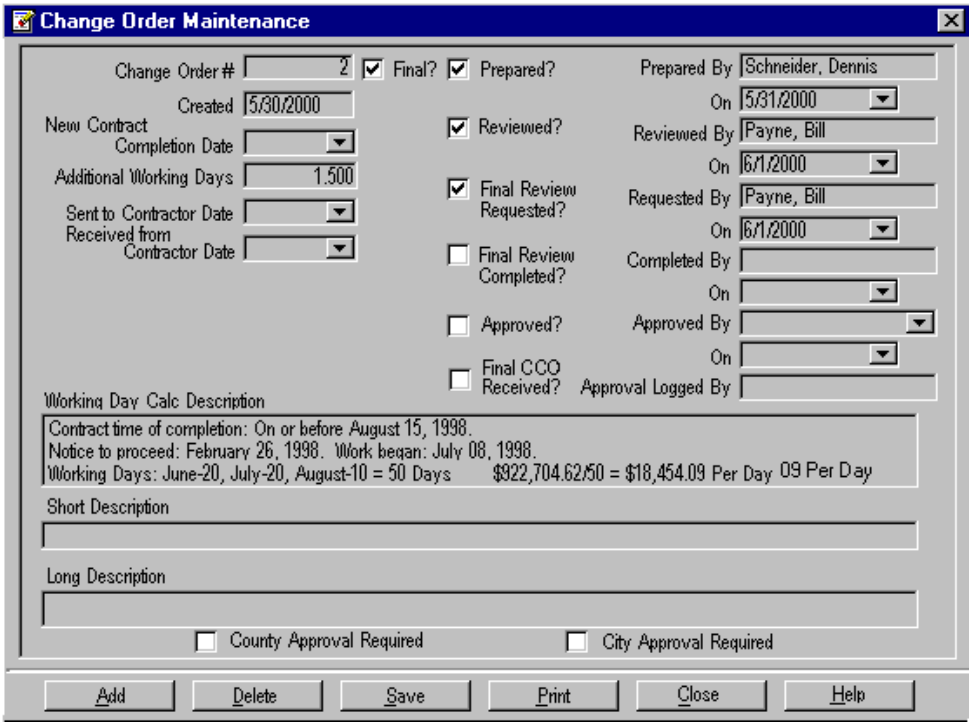


2. Using the sorting functions available as necessary, locate and double click on the desired **contract change order**.

   OR

   Select (highlight) the desired **contract change order** and click on the **Edit Button** [Edit].

The Change Order Maintenance Window appears as shown below. The window contains the information recorded for the CCO selected.



3. Click on the **Final Review Completed?** checkbox.

   A checkmark appears in the box. Information is also automatically entered in the **Completed By** and **On** fields to the right of the checked box. Users can edit the information in the **On** field (by clicking on the downward-pointing arrow next to the field and selecting the proper information from the resulting dropdown calendar). However, the information in the **Completed By** field cannot be changed.

4. Click on the **Save Button** [Save] at the bottom of the window.

5. Click on the **Close Button** [Close] at the bottom of the window.

   The Change Order Maintenance Window is closed, and CM&P returns to the Finals Engineer Notification Window.

6. Repeat steps 2 – 5 as desired for other contract change orders.

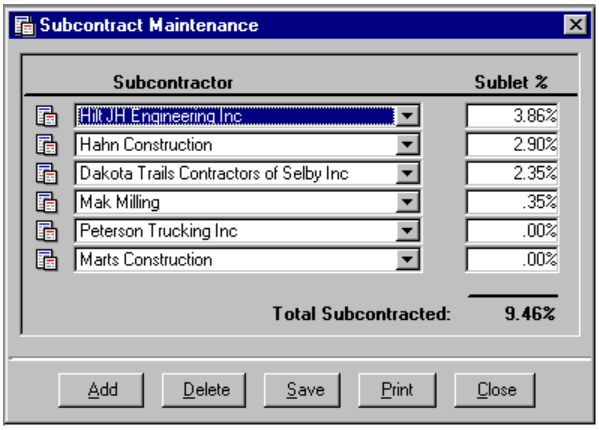
Subcontract Functions

Associate a Subcontractor with a Contract

To associate a subcontractor with a contract, perform the following steps.

1. Select and open the desired contract.
2. Follow the menu path: **Administration, Subcontract**.

   The Subcontract Maintenance Window for the contract appears.



3. Click on the **Add Button** Add.

   A new entry line appears at the top of the window.
4. Select the desired subcontractor from the master subcontractor list available through the downward arrow to the right of the highlighted (blue) text field.
5. Select the applicable subcontractor from the dropdown list.
6. Enter the appropriate value in the **Sublet %** field.
7. Click on the **Save Button** Save at the bottom of the window.
8. Repeat steps 3-7 as desired to add any additional subcontractor(s).
9. Click on the **Close Button** Close at the bottom of the window.

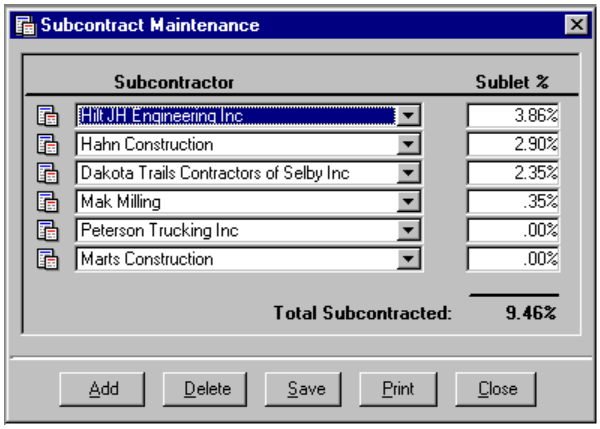
> Users may receive warning messages in such instances as exceeding the general guideline limit of 50% of the contract as subcontracted work. However, CM&P will record such an entry.

Edit Subcontractor Sublet Information

To edit subcontractor sublet information, perform the following steps.

1. Follow the menu path: **Administration, Subcontract**.

   The Subcontract Maintenance Window for the current contract appears as shown below.



2. Enter the appropriate value(s) in any desired **Sublet %** field(s).

3. Click on the **Save Button** Save at the bottom of the window.

4. Click on the **Close Button** Close at the bottom of the window.

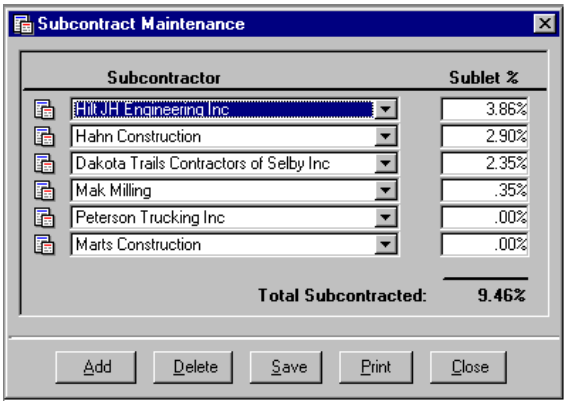
> Users may receive warning messages in such instances as exceeding the general guideline limit of 50% of the contract as subcontracted work. However, CM&P will record such an entry.

Delete a Subcontractor-Contract Association

To delete a subcontractor-contract association, perform the following steps.

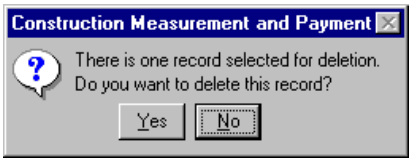
1. Select and open the applicable contract.
2. Follow the menu path: **Administration, Subcontract**.

   The Subcontract Maintenance Window for the current contract appears.



3. Select the desired **subcontractor**.
4. Verify that this is the desired subcontractor-contract association to delete.
5. Click on the **Delete Button** [Delete] at the bottom of the window.

   CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** [No] causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** [Yes] enters the deletion command into the CM&P System.



6. Click on the **Yes Button** [Yes].

> At this point, the information has not yet been deleted. The **Save Button** [Save] must be used after clicking on the **Yes Button** [Yes] to save the information as deleted.

7. Click on the **Save Button** [Save] at the bottom of the window.
8. Click on the **Close Button** [Close] at the bottom of the window.

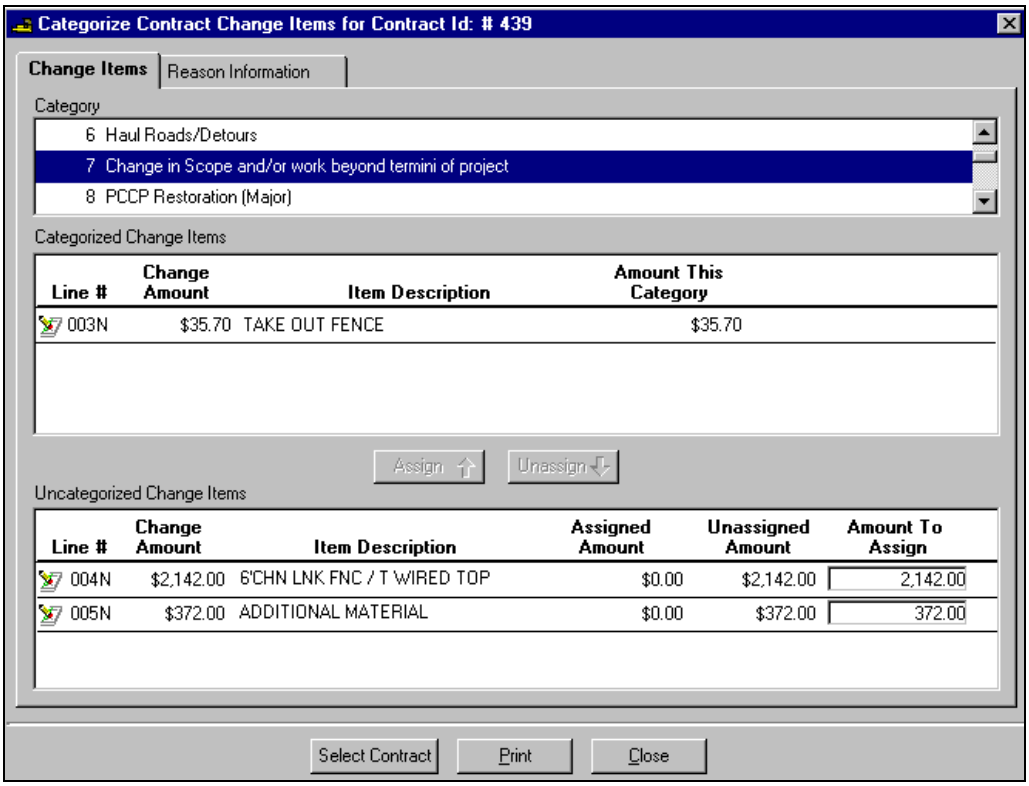
Categorize Contract Change Items

The Categorize Contract Change Items Window is reached through the menu path: **Administration**, **Categorize CCO Items**. This window allows users to categorize CCO items.

To assign contract change items to the appropriate categories, perform the following steps.

1. Follow the menu path: **Administration, Categorize CCO Items.**

   The Categorize Contract Change Items Window appears as shown below.



2. Examine the uncategorized change items listed in the bottom panel and select (highlight) one to categorize.

3. In the **Category** panel, locate the appropriate category for the uncategorized change item selected, using the scrollbar as needed.

4. Select (highlight) the **change category** to which the unassigned change item should be assigned.

   The **Categorized Change Items** panel displays the change items already assigned to the selected change category.

5. Click on the desired **change item** in the **Uncategorized Change Items** panel.

   The **Amount To Assign** field becomes available for entry.

   Partial quantities of a contract change item can be assigned to multiple categories.

6. Enter the desired amount for assignment to the selected category in the **Amount To Assign** field.

7. Click on the **Assign Button** [Assign].

   The change item (to the amount assigned) appears in the **Categorized Change Items** panel. If a partial quantity was assigned, the remaining amount will continue as a change item in the **Uncategorized Change Items** panel.

   An error in assignment can be corrected by selecting the desired pay item and using the **Unassign Button** to return it to the **Uncategorized Change Items** panel.

8. Repeat steps 2-7 as desired to assign other change items to categories.

9. Use the **Select Contract Button** [Select Contract] to repeat the categorization of change items in a different contract if desired.

10. Click on the **Close Button** [Close].

Maintain User Information

User Maintenance Window

The User Maintenance Window is reached through the menu path **Administration**, **Users**, **Maintain Users**. From this window, Engineering Supervisors can adjust, add, or delete user information using the buttons on the User Maintenance Window Toolbar shown below.

The **Print Button** allows users to print the material currently shown on the screen. (This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.)

The **View Button** allows users to prevent unintentional changes from being made to the currently active window. By selecting the View Button, users are instructing the application to protect the displayed information from changes until the Modify Button is selected.

The **Modify Button** causes the cells within the window to turn white, indicating that the information can be changed. To prevent inadvertent changes or deletions, it is recommended that users use the View Button after making all of the desired entries. The View Button returns the cells in the window to gray, which prevents changes from being made.

The **Filter Button** enables users to arrange information according to desired parameters. For instance, a window that consists of five columns can be filtered for only the desired information.

The **Sort Button** allows users to view information sorted and arranged according to the desired parameter(s), for example alphabetical, numerical, or some other order.

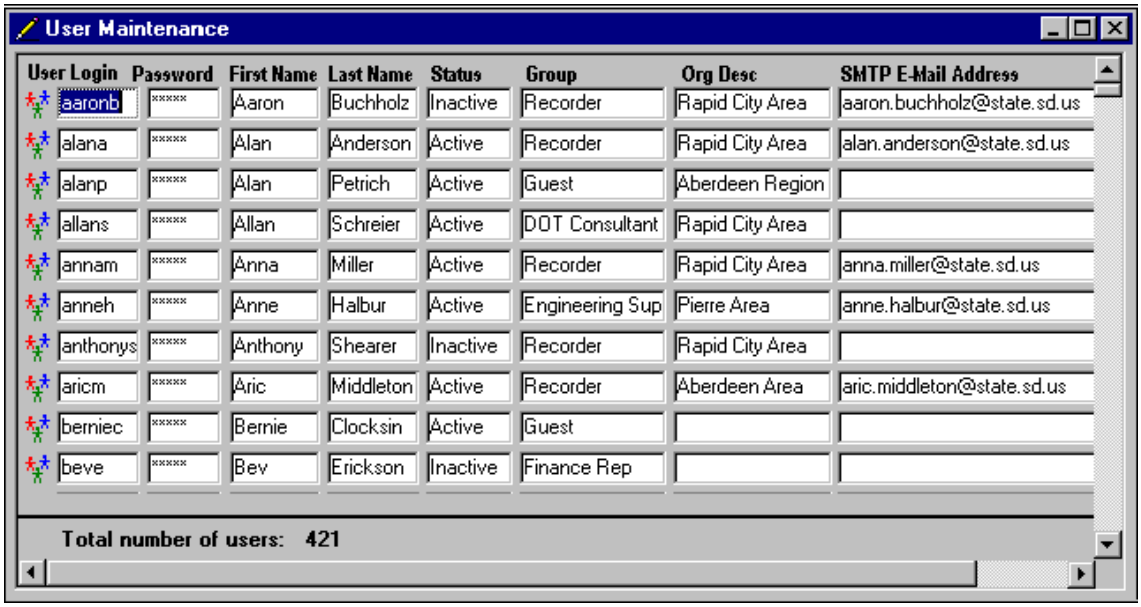
The **Insert Button** inserts a row into an information window. This is necessary when performing such actions as adding a new user to the CM&P System.

The **Delete Button** allows users to permanently remove information, deleting the data displayed in the window.

The **Save Button** records all of the work performed since the last save command was performed. Users are encouraged to save information frequently to prevent losing data. Only saving changes or additions before closing the window will allow the changes to enter the CM&P System.

The **Close Button** allows users to close the window by clicking on it. Any information changes in the window will not be saved unless the Save, Apply, or OK Buttons have been used before the Close Button.

When first opened, the User Maintenance Window displays beneath the User Maintenance Window Toolbar as gray and uneditable. Clicking on the **Modify Button** causes the window to become active as in the example below. Because so much information is available, users may choose to filter or sort the listing in order to more easily find the user(s) they wish to view or edit.



User Login	Password	First Name	Last Name	Status	Group	Org Desc	SMTP E-Mail Address
aaronb	*****	Aaron	Buchholz	Inactive	Recorder	Rapid City Area	aaron.buchholz@state.sd.us
alana	*****	Alan	Anderson	Active	Recorder	Rapid City Area	alan.anderson@state.sd.us
alanp	*****	Alan	Petrich	Active	Guest	Aberdeen Region	
allans	*****	Allan	Schreier	Active	DOT Consultant	Rapid City Area	
annam	*****	Anna	Miller	Active	Recorder	Rapid City Area	anna.miller@state.sd.us
anneh	*****	Anne	Halbur	Active	Engineering Sup	Pierre Area	anne.halbur@state.sd.us
anthonys	*****	Anthony	Shearer	Inactive	Recorder	Rapid City Area	
aricm	*****	Aric	Middleton	Active	Recorder	Aberdeen Area	aric.middleton@state.sd.us
berniec	*****	Bernie	Clocksin	Active	Guest		
beve	*****	Bev	Erickson	Inactive	Finance Rep		

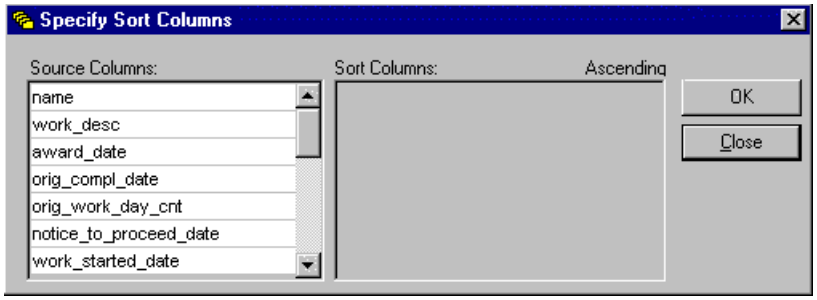
Specify a Sort

Users may specify a sort in several Administration windows in addition to the Maintain Users Window: the Subcontractor Maintenance Window, the Contractor Maintenance Window, the Change Category Maintenance Window, the County Maintenance Window, the State Table Maintenance Window, and the Standard Bid Items Window. Some reports also allow users to sort the information they contain.

To specify a sort, perform the following steps.

1. Click on the **Sort Button** on the toolbar.

   The Specify Sort Columns Window displays as shown below.



2. Click on an option in the **Source Columns** panel and hold the mouse button down.

3. With the mouse button still depressed, drag the selection into the **Sort Columns** panel at the right, then release the button.

   CM&P displays a checkbox entitled **Ascending** with a checkmark in it next to the chosen sort column. Leaving the checkmark will cause CM&P to display the list alphabetically or numerically from zero starting at the top of the screen when the **OK Button** is clicked on; removing it (i.e., clicking on the **Ascending** checkbox) will cause CM&P to display the list in the opposite order.

4. Repeat steps 2 and 3 with any other columns desired for sorting.

5. When the desired sort parameters are set, click on the **OK Button** OK.

Users can re-sort with different criteria by repeating steps 1-5.

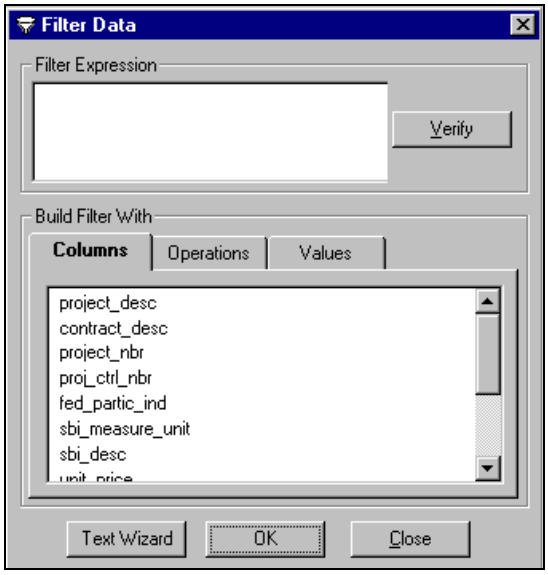
Filter Information

Users may filter information in the Standard Bid Items Window as well as in the Maintain Users Window.

To filter information, perform the following steps:

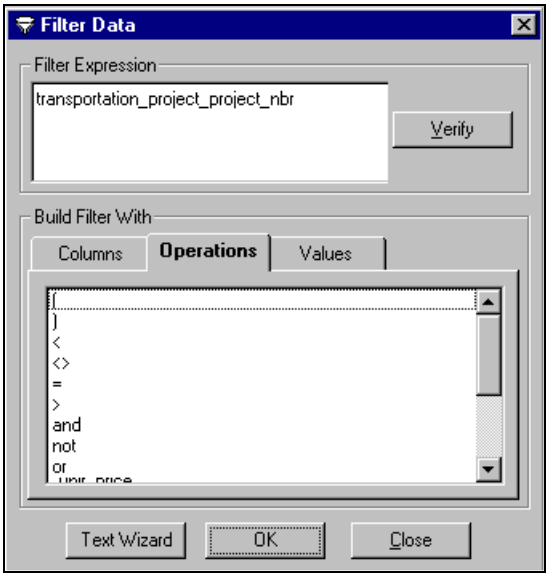
1. Click on the **Filter Button** on the toolbar.

   The Filter Data Window appears as shown below.



2. For a numerical or alphabetical filter, select the first part of the filter expression from the **Columns Tab** and click on the **Operations Tab**. (For a word specific filter, refer to the Text Wizard as for filtering report information.)

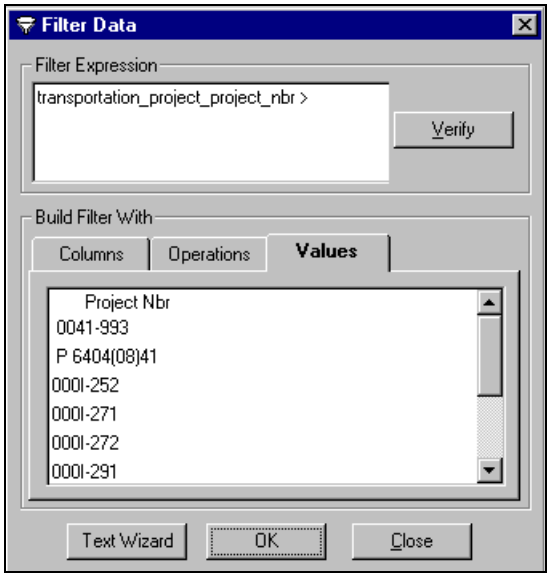
The **Operations Tab** appears as shown below. The operations available are always for a logical search.



3. Select the operation to perform upon the data found in the field specified from the **Columns Tab**, double click it into the filter expression panel above, and click on the **Values Tab**.

Users may return to the **Operations Tab** after establishing a value for the filter expression, to expand the size of the filter expression by adding further operations to be performed, using **and**, **not**, or **or**.

The **Values Tab** appears as shown below. Values appropriate to the field chosen from the **Columns Tab** are displayed. A choice of any column field containing numbers or amounts will result in an offering of values, numbers, or amounts specific to the contract selected. Other column fields require textual values.



4. Select a value to complete the filter expression and double click it into the filter expression panel above.

5. Verify that the expression is valid by clicking on the **Verify Button** Verify.

> If CM&P indicates that the filter expression is invalid, repeat and correct steps 3-5.

6. To generate a filtered list with the valid filter expression, click on the **OK Button** OK.

> Users can re-filter with different criteria by repeating steps 2-7.

Modify User Information

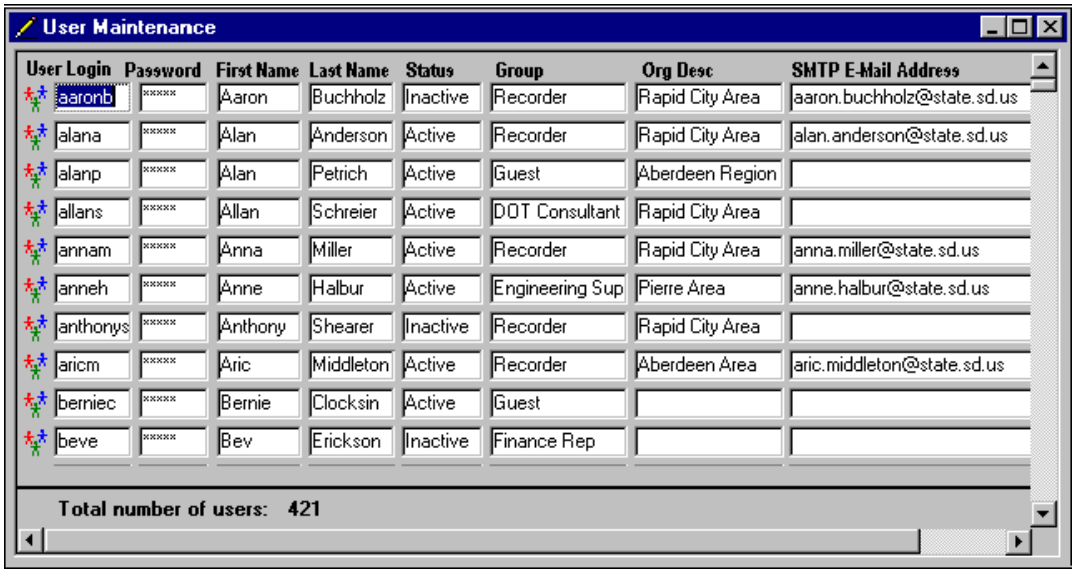
To make changes to a user ID, perform the following steps.

1. From the CM&P Menu Bar, follow the menu path **Administration**, **Users**, **Maintain Users**.

   The User Maintenance Window appears.

2. Click on the **Modify Button** .

   The User Maintenance Window becomes active as shown below.



3. Locate the appropriate **user ID**, using the **Filter Button** and/or **Sort Button** to filter and sort the list as needed.

4. Make changes to the appropriate **data fields** for the user ID.

5. Click on the **Save Button** .

6. Click on the **Close Button** .

Insert a User

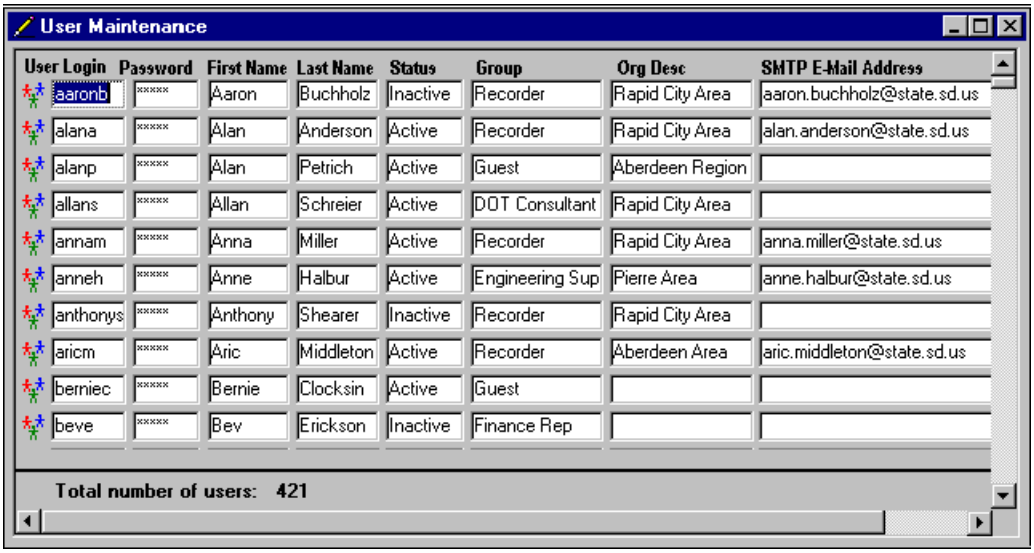
To insert a user into the CM&P System, perform the following steps.

1. From the Administration menu, select **Users, Maintain Users**.

   The User Maintenance Window and toolbar appear.

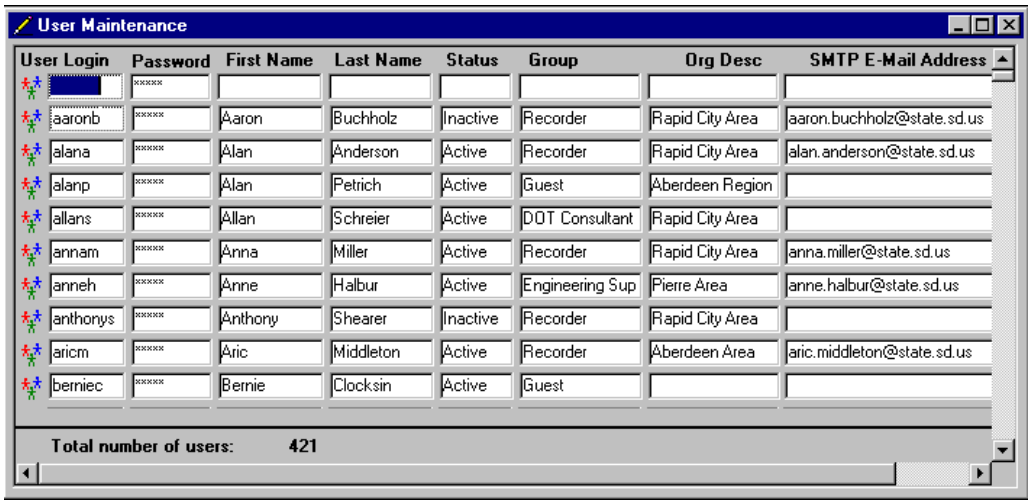
2. Click on the **Modify Button** .

   The User Maintenance Window becomes editable as shown below.



3. Click on the **Insert Button** .

   An empty row appears immediately above the row containing the cursor as shown below.



4. Input the desired information into each field, using the dropdown listings as appropriate.

5. Verify the accuracy of the new information.

6. Click on the **Save Button** .

7. Click on the **Close Button** Close.

Delete a User

> Because employees who are to be deleted might still be recorded as part of a process (e.g., having recorded an installation, approved a pay estimate), simply deleting the employee can have severe ramifications on the system. Instead, mark the employee as "Inactive" in the Maintain Users Window. This prevents additional entries from being made with the employee's user name and password, but does not remove him or her from the system.

If the removal of the employee from the system is desired, perform the following steps:

1. From the Administration menu, select **Users, Maintain Users**.

   The User Maintenance Window and toolbar appear.

2. Locate the desired **user ID**, using the **Filter Button** and/or **Sort Button** to filter and sort the list as needed.

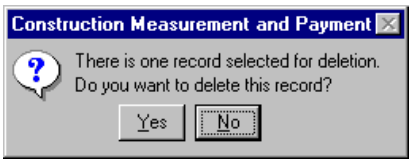
2. Verify that this is the desired user to delete.

3. Click on the **Modify Button**.

4. Click in any field located on the desired user row.

5. Click on the **Delete Button**.

   CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** No causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** Yes enters the deletion command into the CM&P System.



6. Click on the **Yes Button** Yes.

> At this point, the information has not yet been deleted. The **Save Button** must be used after clicking on the **Yes Button** Yes to save the information as deleted.

7. Click on the **Save Button**.

   The deletion just made is now recorded.

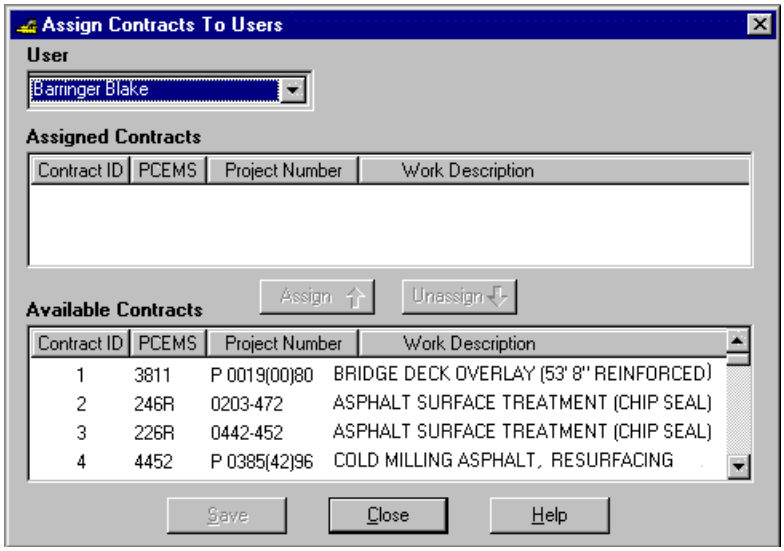
8. Click on the **Close Button**.

Assign Contracts to Users

To assign contracts to DOT Consultants, perform the following steps.

1. Follow the menu path: **Administration, Users, Assign Contracts to Users**.

   The Assign Contracts to DOT Consultants Window appears as shown below.



2. Select the appropriate user name from the **User** field's dropdown list of DOT Consultants.

3. Select (highlight) the appropriate contract from the **Available Contracts** panel and click on the **Assign Button** Assign. If necessary to find the desired contract, sort the contract information in the panel according to any of the column titles by clicking on the desired heading.

> To deselect a contract from the selected DOT Consultant's **Assigned Contracts** panel**,** select (highlight) the appropriate contract and click on the **Unassign Button**.

4. Click on the **Save Button** Save

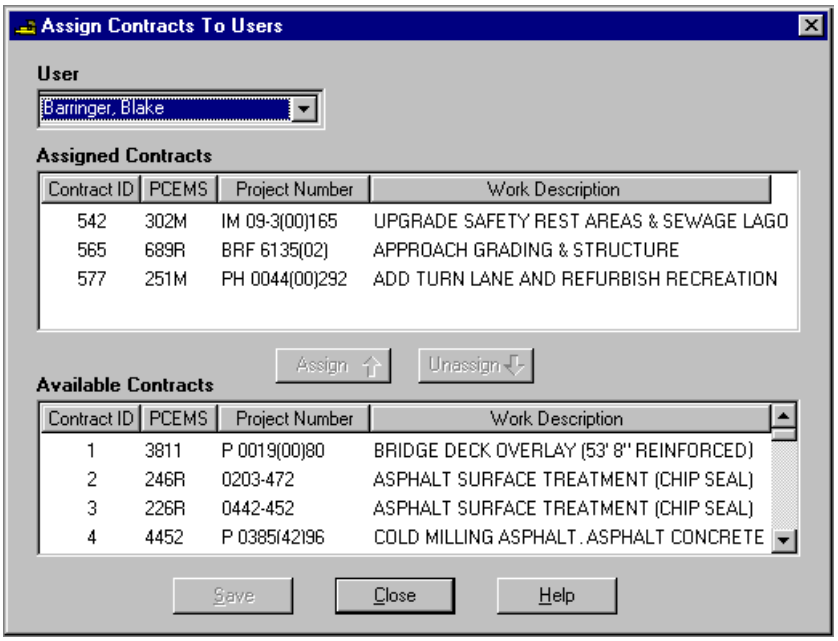
5. Click on the **Close Button** Close

Unassign Contracts from Users

To unassign contracts from DOT Consultants, perform the following steps.

1. Follow the menu path: **Administration, Users, Assign Contracts to Users**.

   The Assign Contracts to DOT Consultants Window appears as shown below.



2. Select the appropriate user name from the **User** field's dropdown list of DOT Consultants.

3. Select (highlight) the appropriate contract from the **Assigned Contracts** panel and click on the **Unassign Button** [Unassign]. If necessary to find the desired contract, sort the contract information in the panel according to any of the column titles by clicking on the desired heading.

> To assign a contract from the selected DOT Consultant's **Available Contracts** panel**,** select (highlight) the appropriate contract and click on the **Assign Button**.

4. Click on the **Save Button** [Save].

5. Click on the **Close Button** [Close].

Maintain Subcontractor Information

Add a Subcontractor to the Master Subcontractor List

> A subcontractor cannot be added until the prime contractor submits a DOT 202 to the Central Office. Also, adding a subcontractor to the master subcontractor list does not indicate DOT approval for the subcontractor to perform work. It merely makes the subcontractor known to the CM&P System.

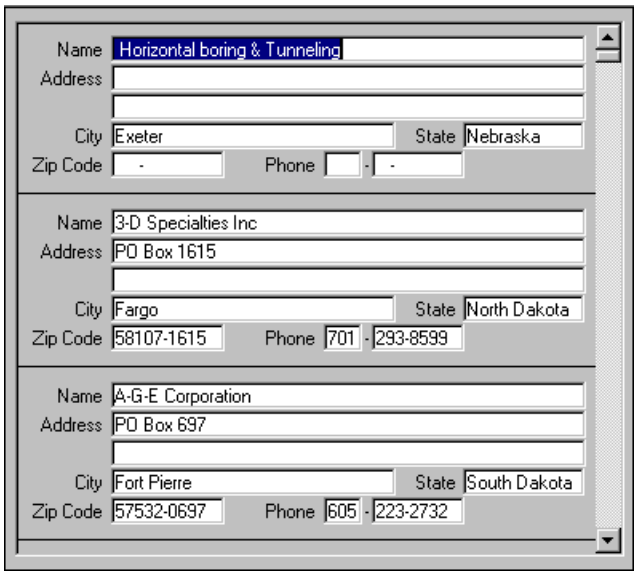
To add a subcontractor to the master subcontractor list, perform the following steps.

1. Follow the menu path: **Maintain Code Tables**, **Subcontractor.**

   The Subcontractor Maintenance Window appears below the Subcontractor Maintenance Window toolbar.

2. Click on the **Modify Button** .

   The fields within the Subcontractor Maintenance Window panels become white as shown below, indicating that data can be entered.



3. Click on the **Insert Button** .

   The previously displayed information is shifted down, and a blank panel is added.

> Once changes in the subcontractor list have been saved, the information is re-alphabetized.

4. Enter the desired information related to the new subcontractor.

5. Click on the **Save Button** .

6. Click on the **Close Button** .

> After entering or editing subcontractor information, users may avoid any accidental changes by clicking on the **View Button** . The view option displays the information as it was entered. The list will not be re-ordered by selecting this feature.

Delete a Subcontractor from the Master Subcontractor List

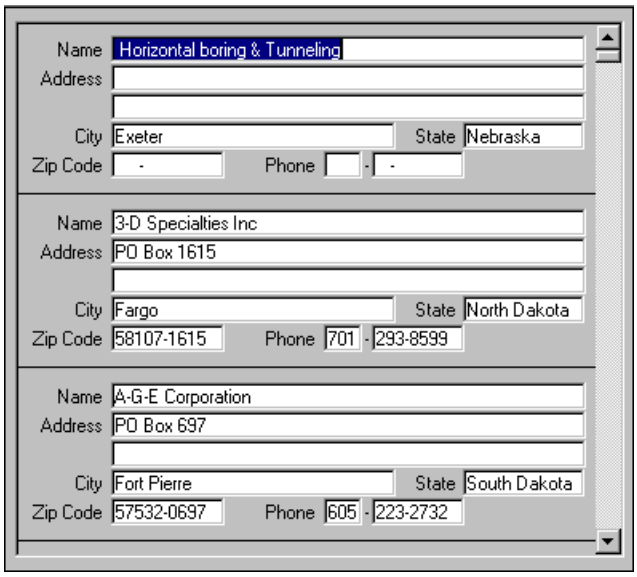
> The CM&P System will not allow users to delete a subcontractor currently assigned to a contract.

To delete a subcontractor from the master subcontractor list, perform the following steps.

1. Follow the menu path: **Maintain Code Tables**, **Subcontractor.**

   The Subcontractor Maintenance Window appears below the Subcontractor Maintenance Window toolbar.

2. Click on the **Modify Button** .



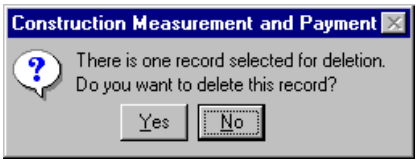
3. Locate the desired subcontractor record. Refer to Specify a Sort if necessary.

4. Click in any **field** in the desired **subcontractor panel** to delete.

5. Verify that this is the desired subcontractor to delete.

6. Click on the **Delete Button** .

   CM&P displays a Deletion Confirmation Window as in the example below. Clicking on the **No Button** No causes CM&P to return to the previous window, disregarding the deletion command. Clicking on the **Yes Button** Yes enters the deletion command into the CM&P System.



7. Click on the **Yes Button** Yes.

> At this point, the information has not yet been deleted. The **Save Button** must be used after clicking on the **Yes Button** Yes to save the information as deleted.

8. Click on the **Save Button**.

   The deletion just made is now recorded.

9. Click on the **Close Button**.

Edit the Master Subcontractor List

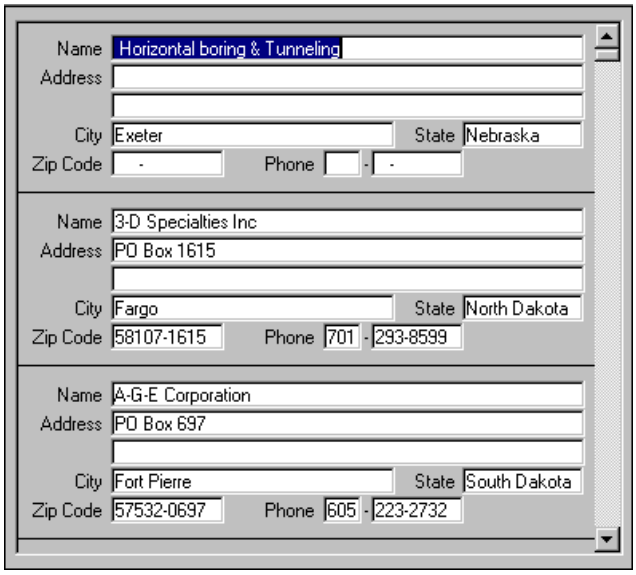
To edit the master subcontractor list, perform the following steps.

1. Follow the menu path: **Administration, Maintain Code Tables**, **Subcontractor.**

   The Subcontractor Maintenance Window appears below the Subcontractor Maintenance Window toolbar.

2. Click on the **Modify Button** .

   The fields within the Subcontractor Maintenance Window become white, indicating that data can be entered.



3. Locate the desired subcontractor record. Refer to Specify a Sort if necessary.

4. Use the vertical scroll bar on the right side of the window to scroll up or down to find the desired subcontract record to change.

5. Click inside the desired **field**.

6. Edit the desired **information**.

   Most of the fields can simply be selected and changed. However, note that the **State** field is a dropdown list. To enter information in this field, first click on it. A dropdown list displays an alphabetical list of the states. A vertical scroll bar to the right of the list allows users to scroll toward the beginning or end of the list to locate the desired state name. Click on the name to display it in the field.

7. Click on the **Save Button** .

8. Click on the **Close Button** .

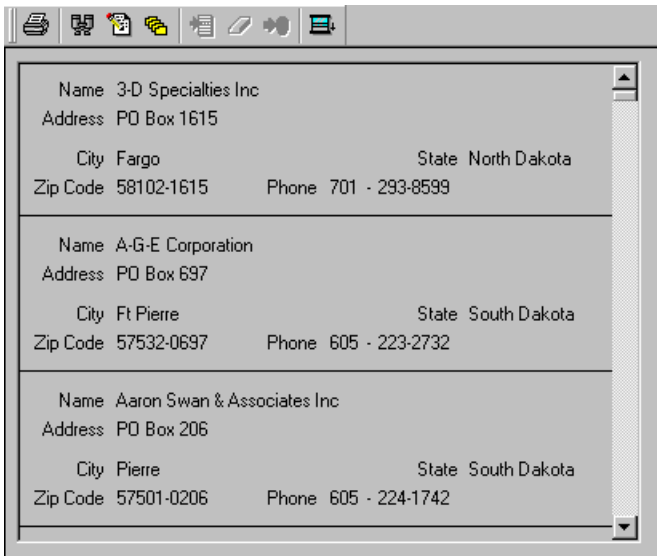
> After entering or editing subcontractor information, users may avoid any accidental changes by clicking on the **View Button** . The view option displays the information as it was entered. The list will not be re-ordered by selecting this feature.

View the Master Subcontractor List

To view the master subcontractor list, perform the following steps.

1. Follow the menu path: **Administration, Maintain Code Tables**, **Subcontractor.**

   The Subcontractor Maintenance Window appears below the Subcontractor Maintenance Window toolbar as shown below.



2. Locate the desired subcontractor record. Refer to Specify a Sort if necessary.

3. Use the vertical scroll bar on the right side of the window to scroll up or down to find the desired subcontract record to view.

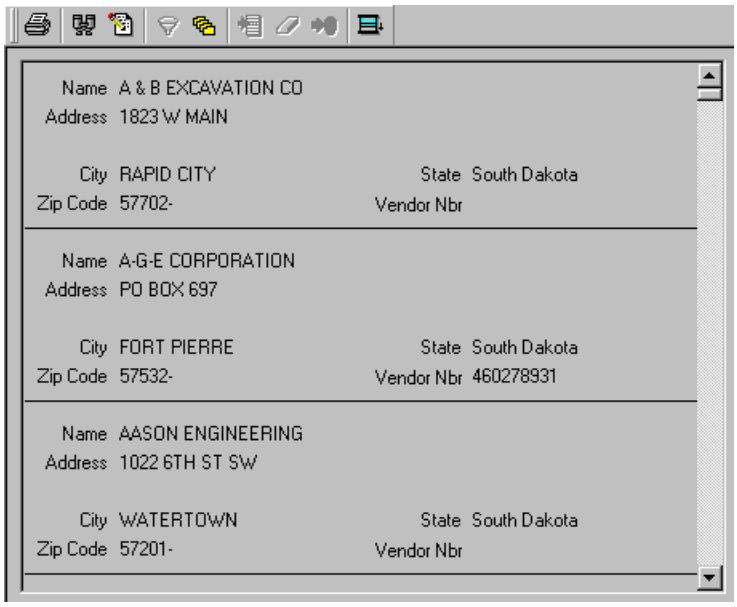
4. View the desired **information**.

5. Click on the **Close Button** .

Miscellaneous Maintain Code Tables Windows

Contractor Window and Toolbar

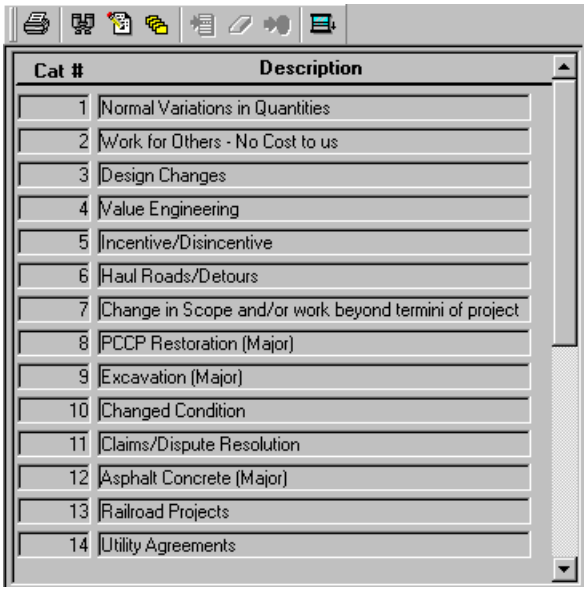
The Contractor Window is reached through the menu path: **Administration, Maintain Code Tables, Contractor**.



No contractor information from other contracts can be affected by users in this window. Prime contractors on a formally let project cannot be modified.

CCO Change Category Maintenance Window and Toolbar

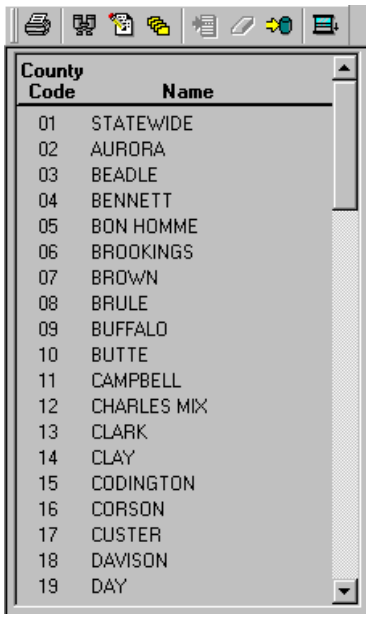
The CCO Change Category Maintenance Window is reached through the menu path: **Administration, Maintain Code Tables, CCO Change Category**.



Cat #	Description
1	Normal Variations in Quantities
2	Work for Others - No Cost to us
3	Design Changes
4	Value Engineering
5	Incentive/Disincentive
6	Haul Roads/Detours
7	Change in Scope and/or work beyond termini of project
8	PCCP Restoration (Major)
9	Excavation (Major)
10	Changed Condition
11	Claims/Dispute Resolution
12	Asphalt Concrete (Major)
13	Railroad Projects
14	Utility Agreements

County Maintenance Window and Toolbar

The County Maintenance Window is reached through the menu path: **Administration, Maintain Code Tables, County**.



County Code	Name
01	STATEWIDE
02	AURORA
03	BEADLE
04	BENNETT
05	BON HOMME
06	BROOKINGS
07	BROWN
08	BRULE
09	BUFFALO
10	BUTTE
11	CAMPBELL
12	CHARLES MIX
13	CLARK
14	CLAY
15	CODINGTON
16	CORSON
17	CUSTER
18	DAVISON
19	DAY

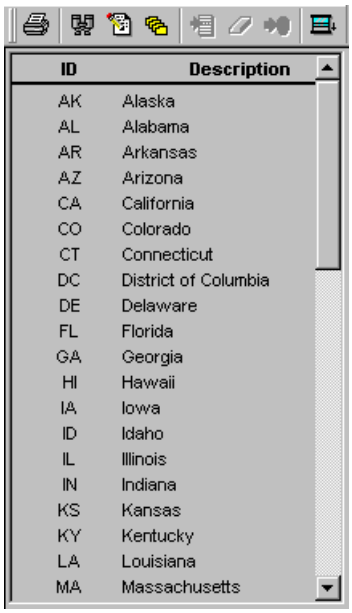
Organizational Unit Maintenance Window and Toolbar

The Organizational Unit Maintenance Window is reached through the menu path:
Administration, Maintain Code Tables, Organizational Unit.

Org Code	Description
10	Aberdeen Region
11	Aberdeen Area
12	Watertown Area
13	Huron Area
20	Mitchell Region
21	Mitchell Area
22	Sioux Falls Area
23	Yankton Area
30	Pierre Region
31	Pierre Area
32	Mobridge Area
33	Winner Area
40	Rapid City Region
41	Rapid City Area
42	Belle Fourche Area
43	Custer Area
50	Statewide Operations
51	Statewide Area

State Table Maintenance Window and Toolbar

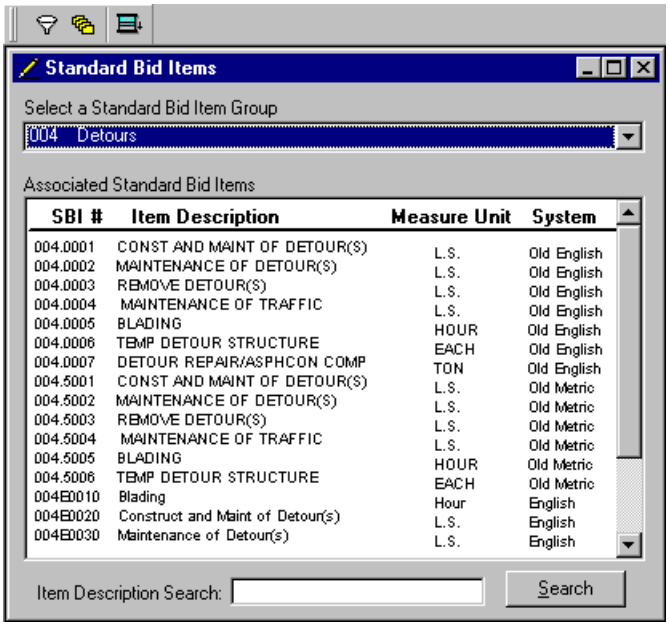
The State Table Maintenance Window is reached through the menu path: **Administration, Maintain Code Tables, State**.



ID	Description
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware
FL	Florida
GA	Georgia
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts

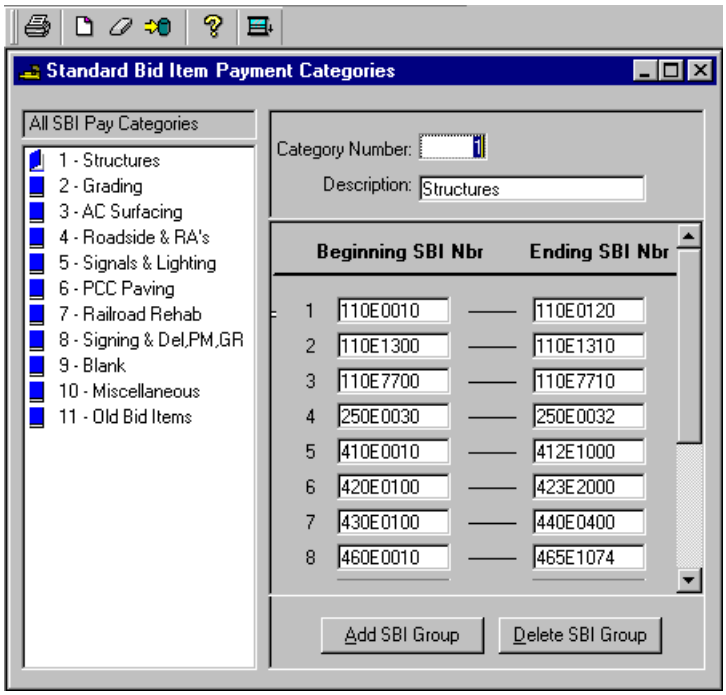
Standard Bid Items Maintenance Window and Toolbar

The Standard Bid Items Maintenance Window is reached through the menu path: **Administration, Maintain Code Tables, Standard Bid Items**.



Standard Bid Item Pay Categories Maintenance Window and Toolbar

The Standard Bid Item Pay Categories Maintenance Window is reached through the menu path: **Administration, Maintain Code Tables, Contractor**.

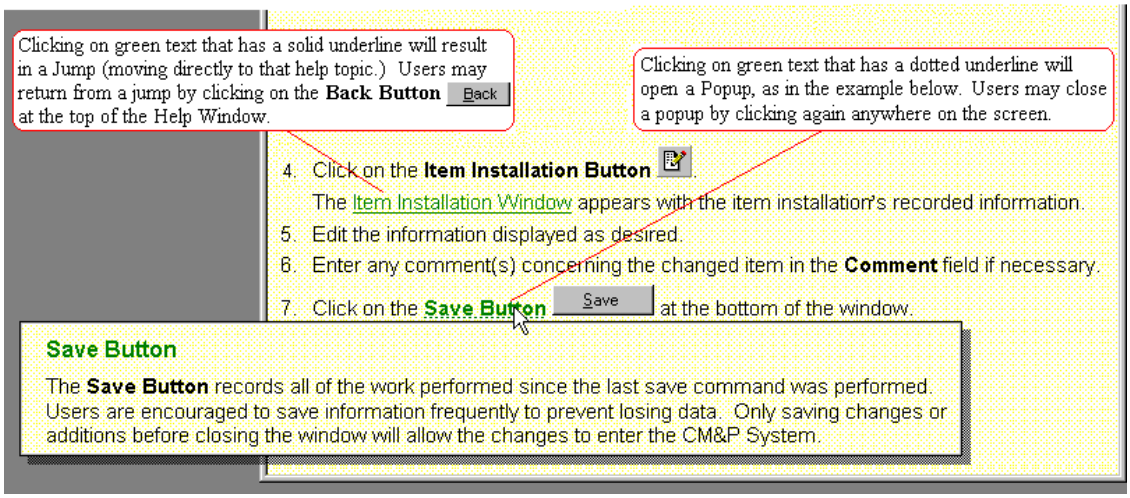


21. Using the Online Help

Users needing specific help for a CM&P Window or those whose CM&P System User Guide manual is out of reach may use the CM&P Online Help. This function is reached through the **Help Button** or Help on many windows or through the menu path: **Help, Help Contents**. The Help Window allows users to search for information about the application in three different ways: in a table of contents, in an index, and in a full text search. It also allows users to browse through related topics, make notes to themselves, and find help topics they looked at earlier.

Within Help Windows, users are often instructed to click on provided examples of CM&P windows for further help, but green text is also an indicator of further help available as shown below.

Anywhere in a Help Window that the cursor changes from a pointer to a hand is active and may be clicked upon.



Search the Help Window Contents Tab

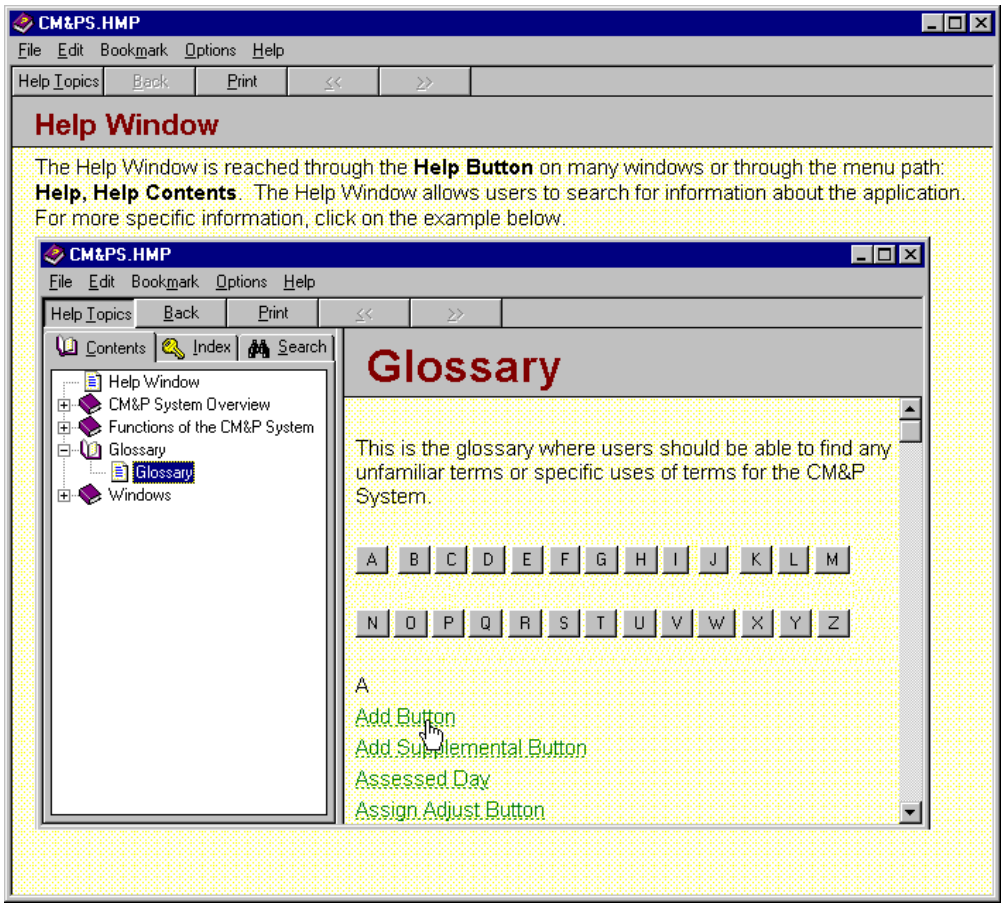
To search the Help Window Contents Tab, perform the following steps.

1. Click on the **Help Button** available on the window [Help] or toolbar [?].

OR

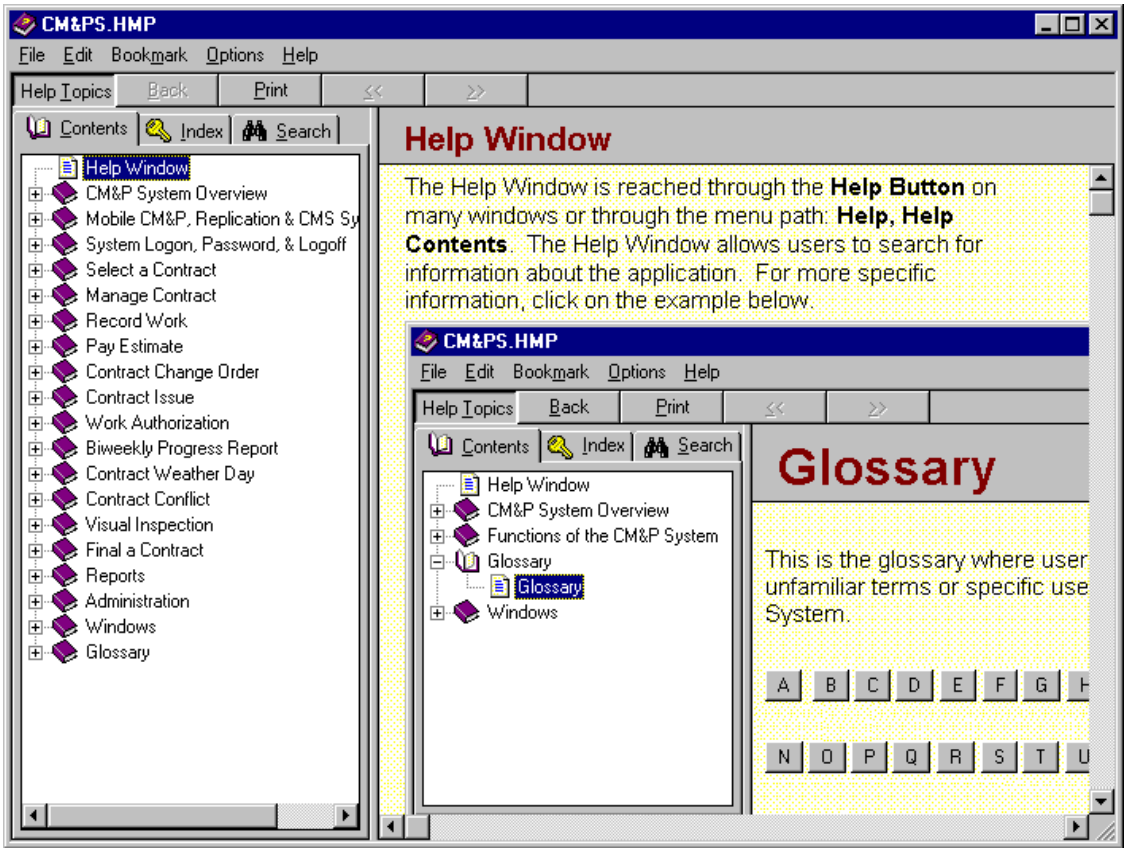
Follow the menu path: **Help, Help Contents**.

The Help Window appears, displaying either the help topic assigned to the specific window from which it was called or the default help topic as shown in the example below.



2. If the Help Topics tabs are not visible on the left side of the window, click on the **Help Topics Button** [Help Topics] on the Help Window Toolbar.

The Help Topics tabs appear on the left side of the window displaying the Contents Tab as shown below. (Clicking on the **Help Topics Button** again will hide the tabs and allow a better view of the current help topic and its examples.)

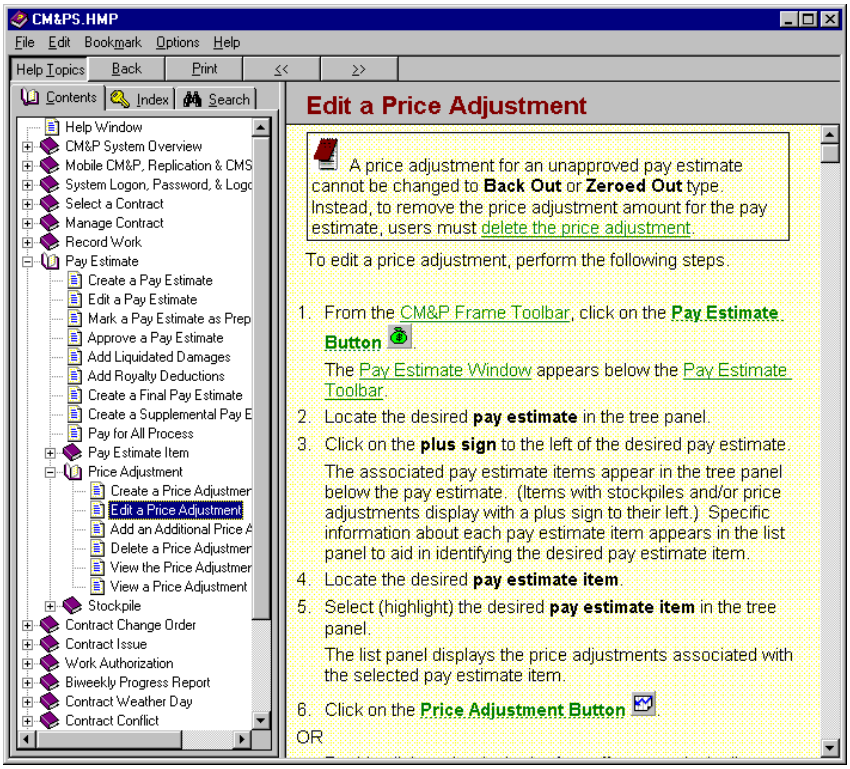


3. Scan down the listing of books for your general area of interest. Click on the desired book or on the plus sign in front of it.

   The book will open and display its pages and (in some cases) its subordinate books as in the example below.

4. Double-click on a page's help topic to look at it.

The **help topic** selected is displayed on the right side of the Help Window. In this example, on the **Contents Tab**, the book **Pay Estimate** is opened, then within it the book **Price Adjustment** is opened to the **Edit a Price Adjustment** page.



5. Click on the **Help Topics Button** to hide the tabs on the left and display the complete width of the help topic.

6. Use the scrollbar to view the complete length of the help topic.

7. Use the **Browse Buttons** on the Help Toolbar to move forward and backward to other related help topics.

8. Use the **Bookmark** menu item to add the topic to the bookmark list if desired.

> Once a topic is added to the bookmark list, clicking on the **Bookmark** menu item will allow users to select that topic and jump directly to it. The keystroke is **Alt + M**.

9. Use the **Edit** menu item to copy the help topic into another file or to annotate the topic for future reference if desired.

> Annotating a topic creates a paperclip symbol in the upper left corner of the help topic display. When the paperclip is clicked on, any notes recorded about the instructions or the CM&P function they are associated with are displayed for reading, editing, or deletion.

Search the Help Window Index Tab

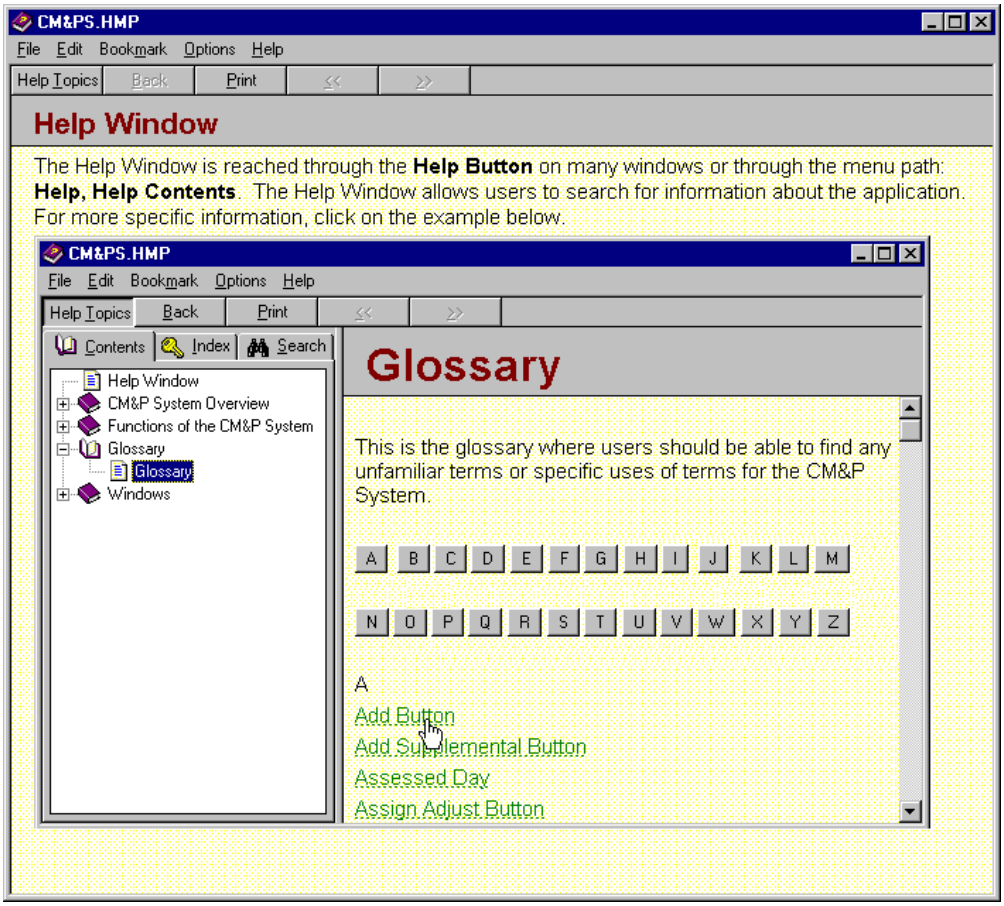
To search the Help Window Index Tab, perform the following steps.

1. Click on the **Help Button** available on the window [Help] or toolbar [?].

OR

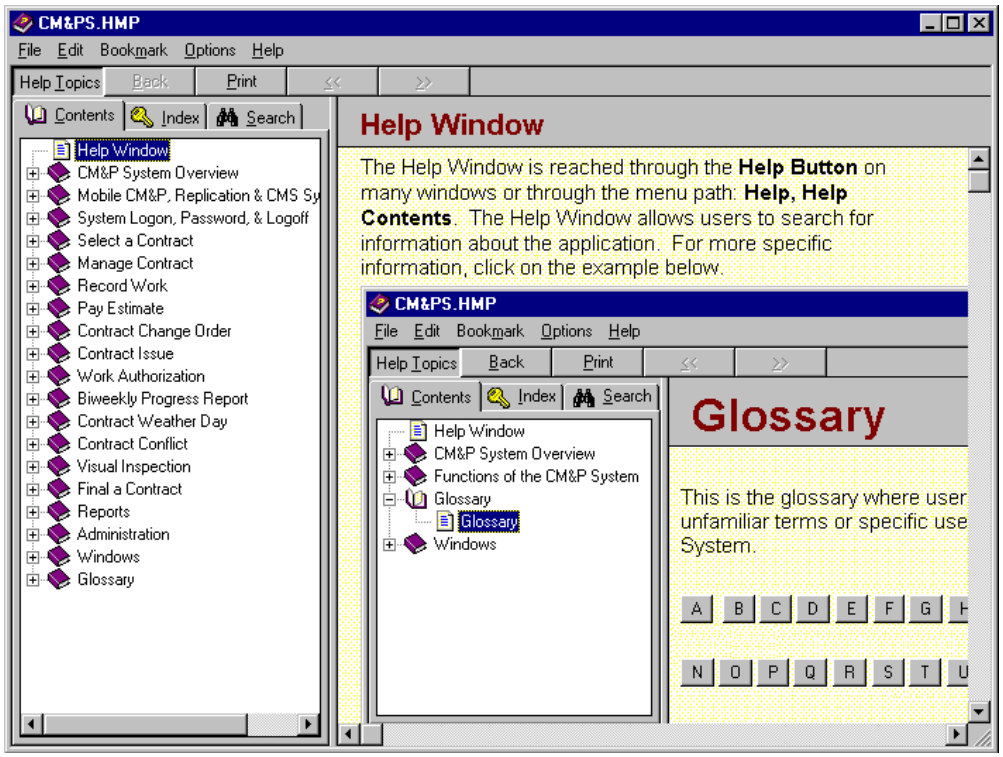
Follow the menu path: **Help, Help Contents**.

The Help Window appears, displaying either the help topic assigned to the specific window from which it was called or the default help topic as shown in the example below.



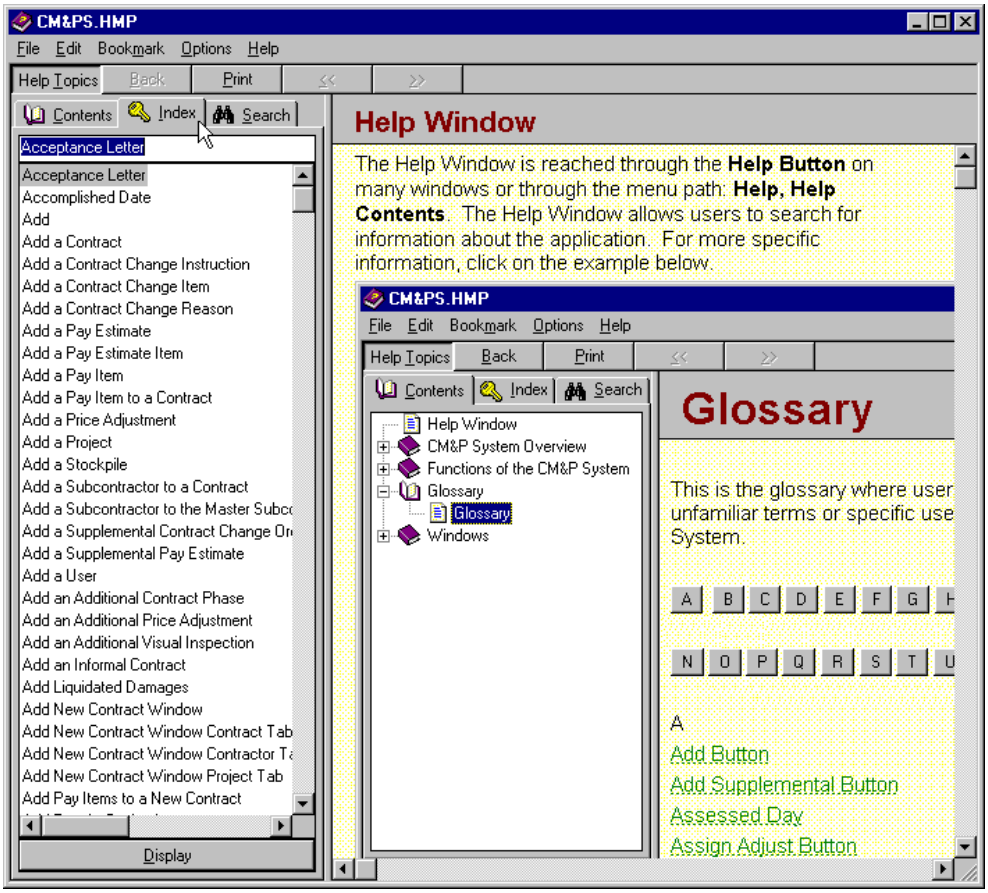
2. If the Help Topics tabs are not visible on the left side of the window, click on the **Help Topics Button** [Help Topics] on the Help Window Toolbar.

The Help Topics tabs appear on the left side of the window and display the Contents Tab as shown below. (Clicking on the **Help Topics Button** again will hide the tabs and allow a better view of the current help topic and its pictures.)



3. Click on the **Index Tab**.

The Index Tab displays as in the example below.

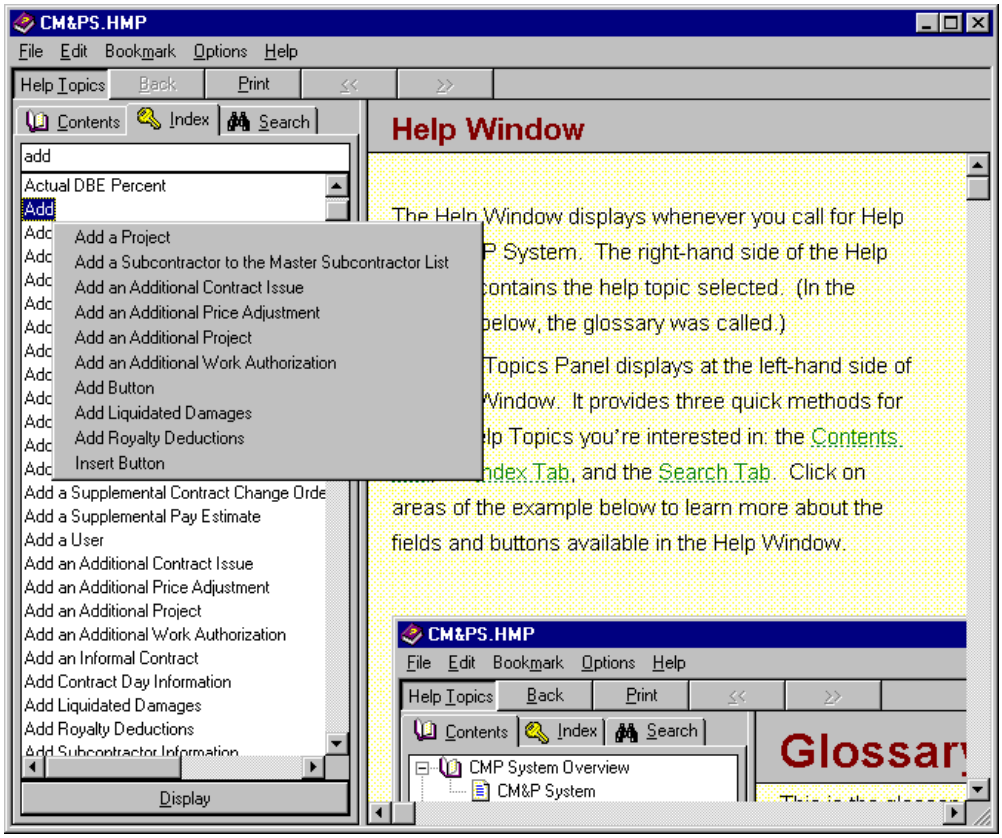


4. Enter the desired **index term** in the highlighted field.

   The list below the entry field changes to display index entries alphabetically close to the desired term.

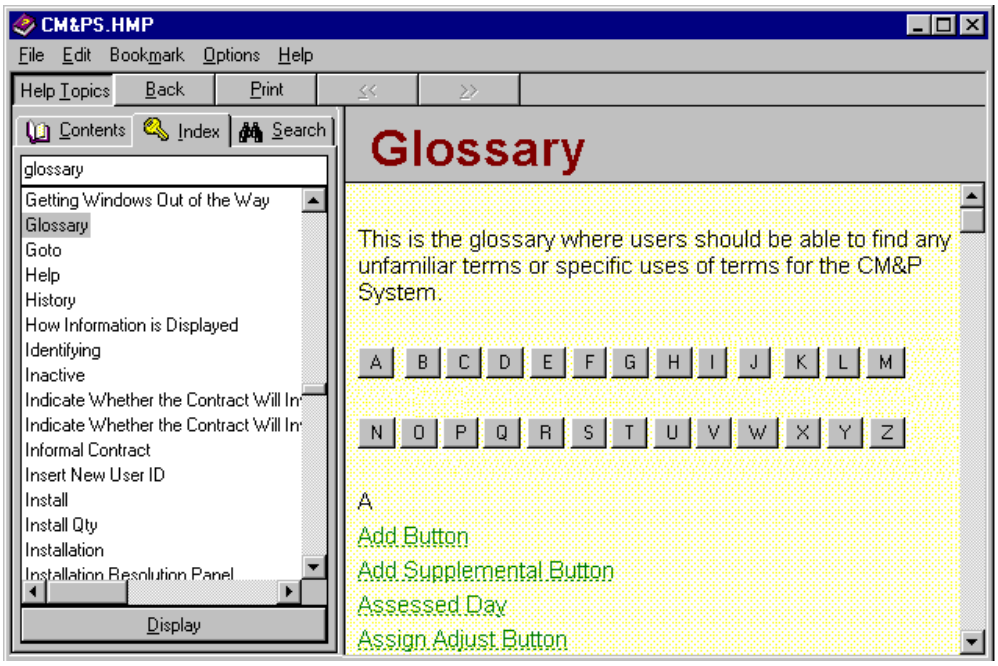
5. Find and click on the **desired term** within the list, scrolling to locate it if necessary.

If more than one help topic is associated with the selected term, a dropdown of choices becomes available to click on to display their help topics as shown below.



OR

If there is only one help topic associated with the term, the topic is displayed in the help window as shown below.



6. Click on the **Help Topics Button** to hide the tabs on the left and display the complete width of the help topic.

7. Use the scrollbar to view the complete length of the help topic.

8. Use the **Browse Buttons** on the Help Toolbar to move forward and backward to other related help topics.

9. Use the **Bookmark** menu item to add the topic to the bookmark list if desired.

> Once a topic is added to the bookmark list, clicking on the **Bookmark** menu item will allow users to select that topic and jump directly to it. The keystroke is **Alt + M**.

10. Use the **Edit** menu item to copy the help topic into another file or to annotate the topic for future reference if desired.

> Annotating a topic creates a paperclip symbol in the upper left corner of the help topic display. When the paperclip is clicked on, any notes recorded about the instructions or the CM&P function they are associated with are displayed for reading, editing, or deletion.

Search the Help Window Search Tab

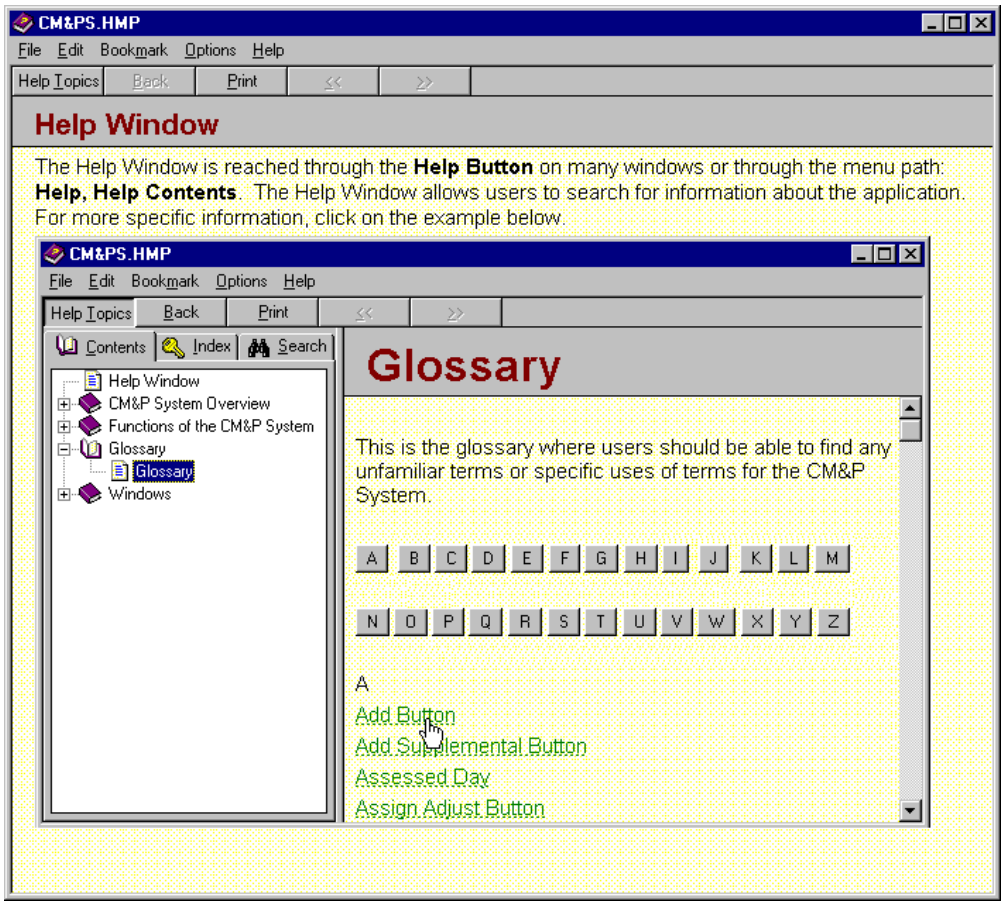
To search the Help Window Search Tab, perform the following steps.

1. Click on the **Help Button** available on the window [Help] or toolbar [?].

OR

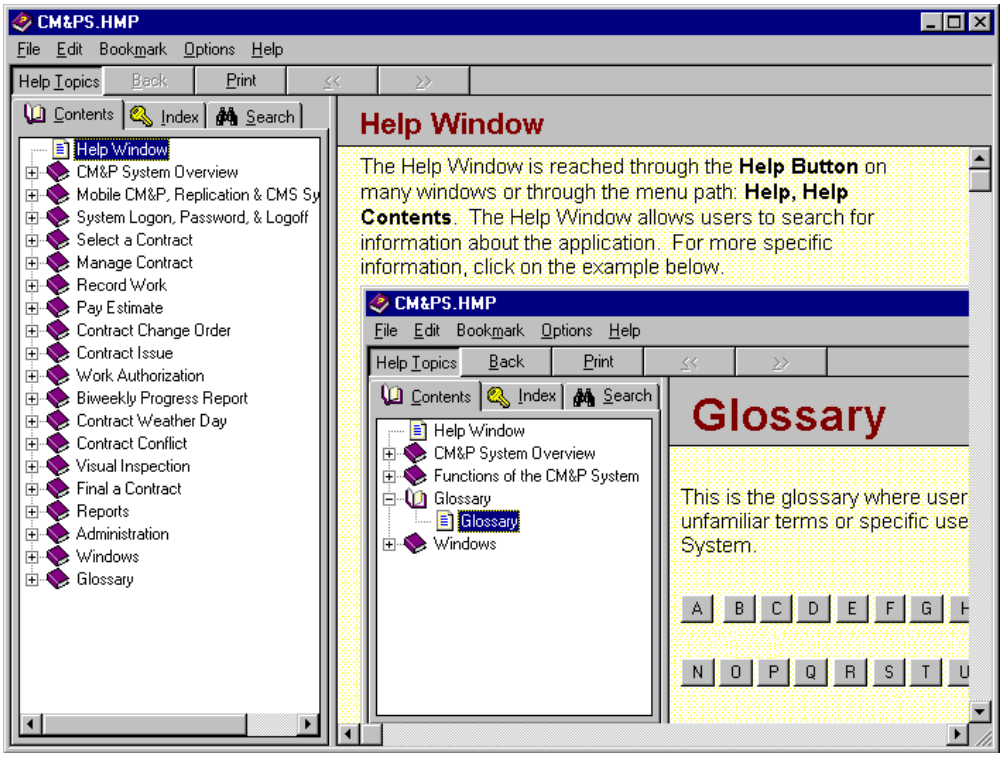
Follow the menu path: **Help, Help Contents**.

The Help Window appears, displaying either the help topic assigned to the specific window from which it was called or the default help topic as shown in the example below.



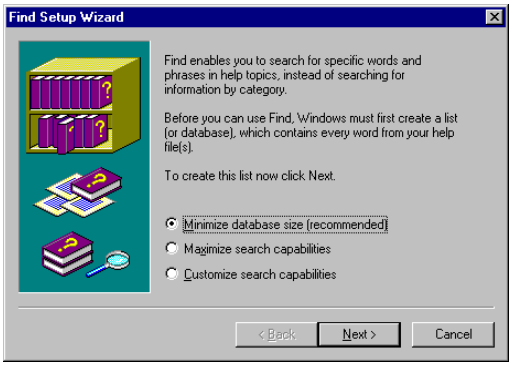
2. If the Help Topics tabs are not visible on the left side of the window, click on the **Help Topics Button** [Help Topics] on the Help Window Toolbar.

The Help Topics tabs appear on the left side of the window and display the Contents Tab as shown below. (Clicking on the **Help Topics Button** again will hide the tabs and allow a better view of the current help topic and its pictures.)



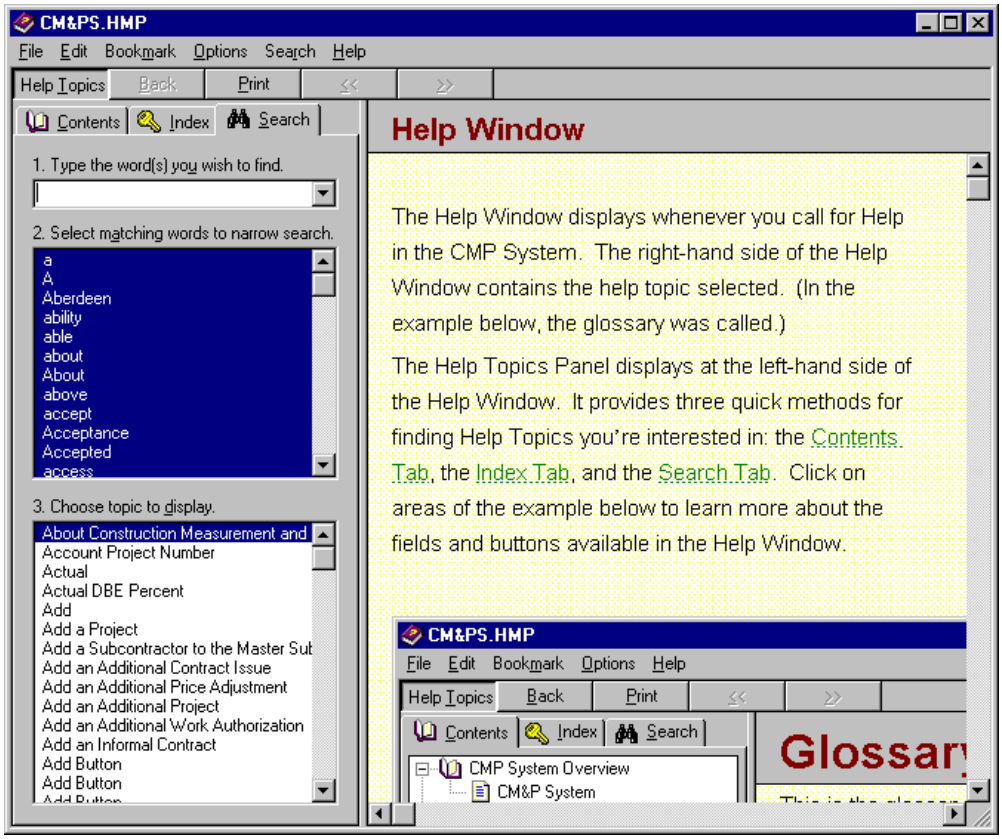
3. Click on the **Search Tab**.

If the search option has not been used before, a short wizard may appear as in the example below.



Click on the **Next Button** and the **Finish Button**.

The Search Tab displays as in the example below.

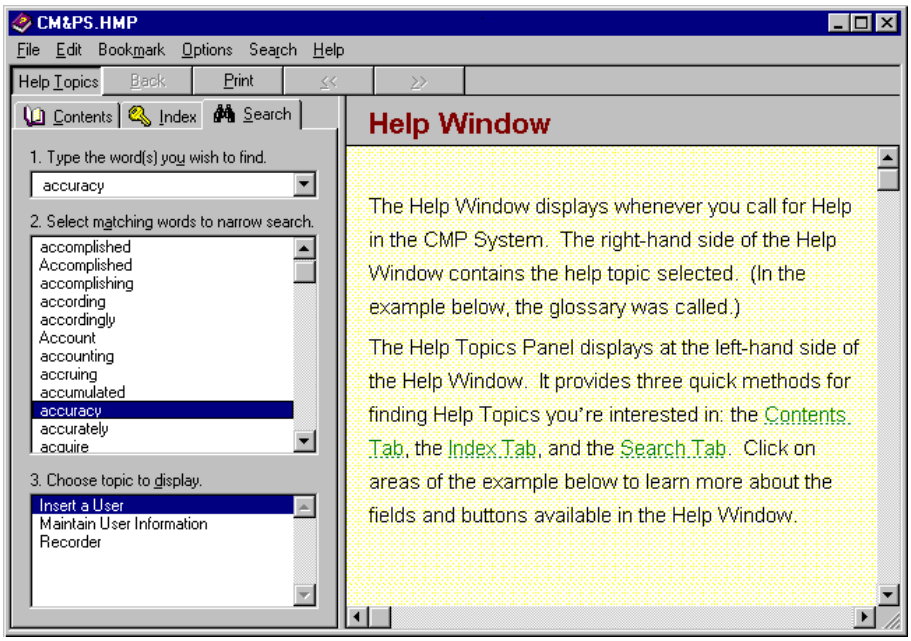


4. Enter the desired **search term** in the highlighted field.

   The **matching list to narrow the search** changes to display search entries alphabetically close to the desired term.

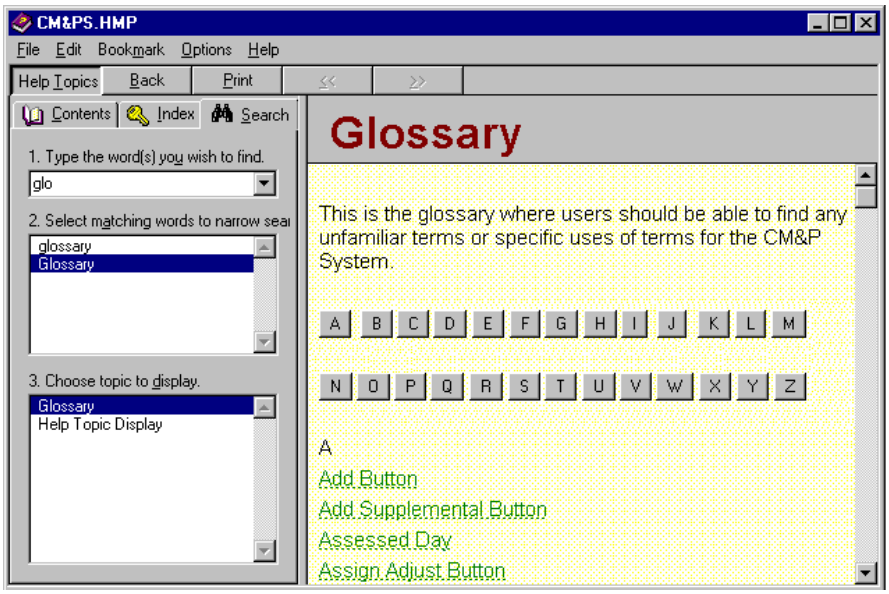
5. Find and click on the desired term within the **matching list to narrow the search**, scrolling to locate it if necessary.

The available topics associated with the search term appear in the **topics to display** field as shown below.



6. Click on the desired **topic** to display.

   The topic displays in the help window as shown below.



7. Click on the **Help Topics Button** to hide the tabs on the left and display the complete width of the help topic.

8. Use the scrollbar to view the complete length of the help topic.

9. Use the **Browse Buttons** on the Help Toolbar to move forward and backward to other related help topics.

10. Use the **Bookmark** menu item to add the topic to the bookmark list if desired.

> Once a topic is added to the bookmark list, clicking on the **Bookmark** menu item will allow users to select that topic and jump directly to it. The keystroke is **Alt + M**.

11. Use the **Edit** menu item to copy the help topic into another file or to annotate the topic for future reference if desired.

> Annotating a topic creates a paperclip symbol in the upper left corner of the help topic display. When the paperclip is clicked on, any notes recorded about the instructions or the CM&P function they are associated with are displayed for reading, editing, or deletion.

Help Topics Bookmarks

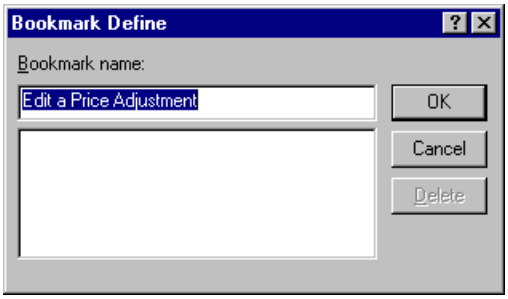
A help topic must first be on the bookmark list before it can be found through the Bookmark menu item. For information on defining, deleting, and accessing bookmarked topics, refer to the instructions below.

Define a Bookmark Function

To bookmark a help topic for later reference, perform the following steps.

1. Open the desired help topic in the Help Window.
2. Follow the menu path: **Bookmark, Define**.

   The Bookmark Define Window appears, displaying the title of the current help topic as shown below.



3. If this is the desired help topic to bookmark, click on the **OK Button** OK.

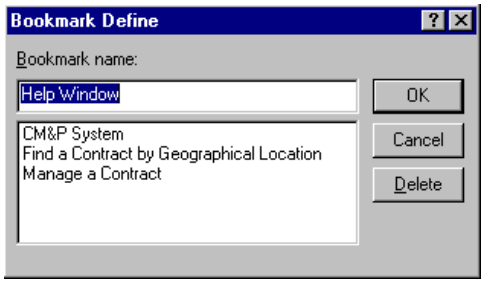
   The help topic is added to the alphabetical list of marked topics in the lower window.
4. Repeat steps 1-3 as desired for other help topics.

Delete a Bookmark Function

To remove a topic from the bookmark listing, perform the following steps.

1. Open the Help Window from the menu path: **Help, Help Contents** OR from a **Help Button**.
2. Follow the menu path: **Bookmark, Define**.

The Bookmark Define Window appears as shown below.



3. Click on the desired help topic to delete, highlighting it.
4. Click on the **Delete Button** Delete.

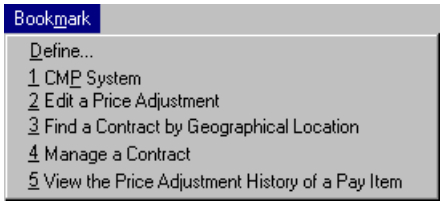
   The help topic is removed from the bookmark list.
5. Repeat steps 2-4 as desired for other help topics.

Use the Bookmark Function to Find a Help Topic

To find a help topic previously added to the bookmark listing, perform the following steps.

1. Open the Help Window from the menu path: **Help, Help Contents** OR from a **Help Button**.
2. Hover the mouse over the **Bookmark** menu item.

   All help topics on the alphabetical bookmark list appear as shown below.



3. Click on the desired help topic to view.

   The help topic is instantly displayed.
4. Repeat steps 2-3 as desired for other help topics.

Use the Help Topic History Function

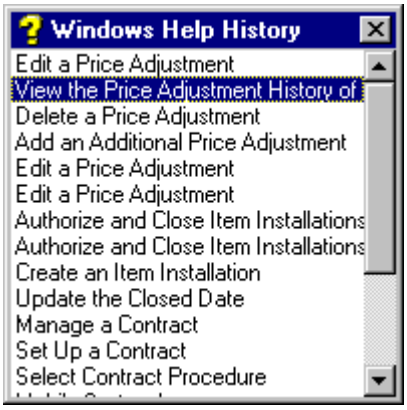
Help topics viewed at times other than the present help session will not be available, unless bookmarked. Refer to Use the Bookmark Function for bookmarked help topics.

To use the help topic history function, perform the following steps.

1. Open the Help Window from the menu path: **Help, Help Contents** OR from a **Help Button**.

2. Follow the menu path: **Options, Display History Window.**

   The Windows Help History Window displays, listing (in reverse order) the windows viewed since the Online Help was called, as shown below.



3. Locate and click on the desired help topic, using the scrollbar and/or arrow keys if necessary.

   The help topic is instantly displayed.

Keep Notes within a Help Topic

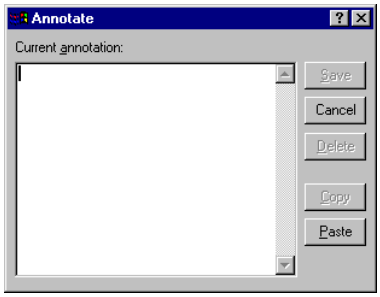
A help topic may be used to store users' personal notes about how to perform a CM&P function. For information on entering, deleting, and accessing your own notes within help topics, refer to the instructions below.

Annotate a Help Topic

To annotate a help topic, perform the following steps.

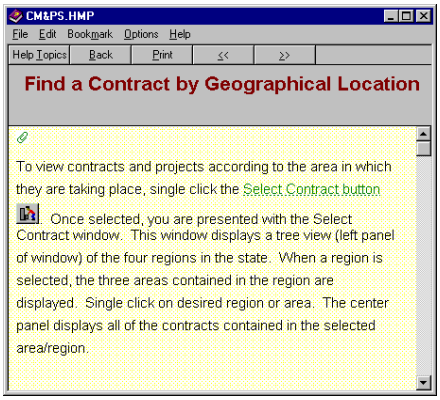
1. Open the desired help topic in the Help Window.
2. Follow the menu path: **Edit, Annotate**.

   The Annotate Window appears as shown below.



3. Enter any notes desired.
4. Click on the **Save Button** Save.

   A paperclip appears in the upper left corner of the help topic as shown below. Whenever the help topic is called, this paperclip will display as an icon available to access the notes recorded-until the user notes are deleted.

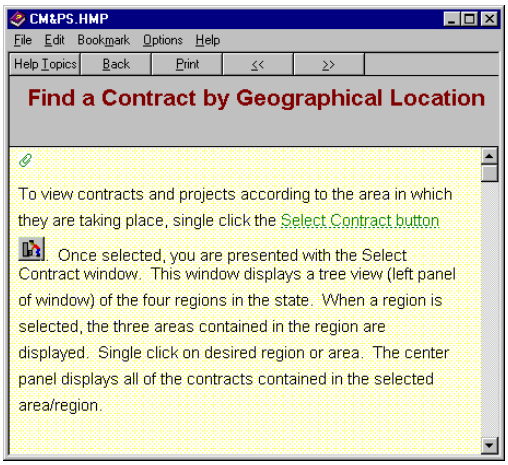


Delete an Annotation from a Help Topic

To delete old notes from a help topic, perform the following steps.

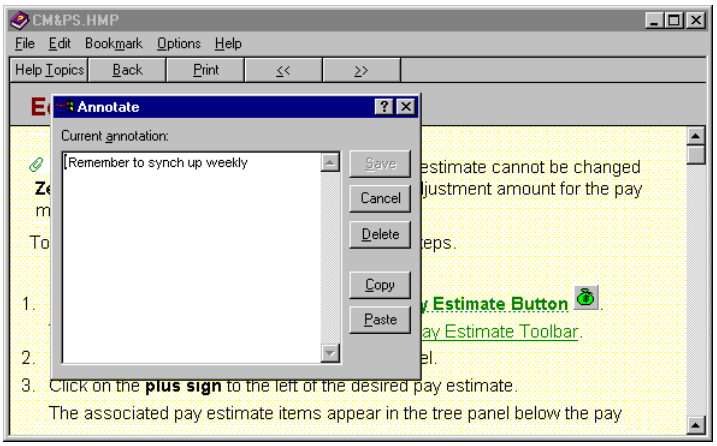
1. Open the desired help topic in the Help Window.

   It opens as shown below with a paperclip in the upper left corner.



2. Click on the paperclip OR follow the menu path: **Edit, Annotate**.

   The Annotate Window appears as shown below.



3. Click on the **Delete Button** Delete.

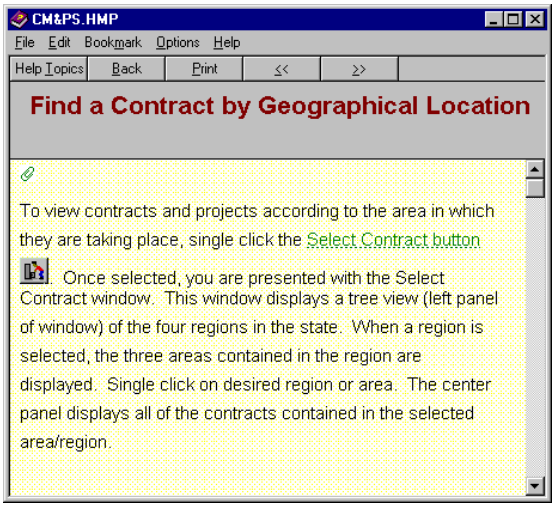
   The annotation is removed.

Read and/or Edit Annotations in a Help Topic

To read or edit notes added to a help topic in the past, perform the following steps.

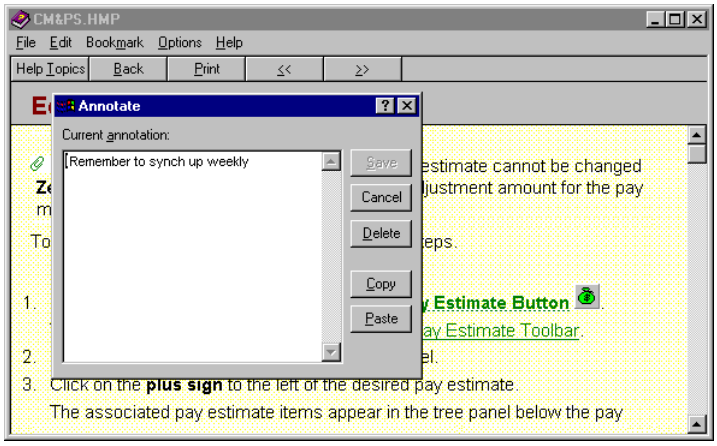
1. Open the desired help topic in the Help Window.

   It opens as shown below with a paperclip in the upper left corner.



2. Click on the paperclip OR follow the menu path: **Edit, Annotate**.

   The Annotate Window appears as shown below.



3. Read and/or edit any notes as desired.

4. Click on the **Save Button** Save to save any changes made OR click on the **Cancel Button** Cancel if no changes were made.

Glossary

Add Button

Add The **Add Button** clears — it does not delete — the information in the currently active window and allows users to enter information about a new item.

Add Supplemental Button

Add Supplemental The **Add a Supplemental Pay Estimate Button** allows users to generate a pay estimate after a final pay estimate is approved. This is used in cases where a final pay estimate does not contain all pay items, as additional issues have occurred since the final pay estimate. A supplemental pay estimate would be created only if a supplemental CCO had been created

Apply Button

Apply The **Apply Button** commands CM&P to record all of the work performed since the last OK, save or apply command was performed.

Assessed Day

An assessed day is one that is deducted from the total number of contract days.

Assign Button

Assign Use the **Assign Button** to move highlighted items from one field to the other.

Assign Price Adjustment Button

The **Assign Price Adjustment Button** opens the Assign Price Adjustments to CCO's Window, allowing users to move pay estimates' **actual** price adjustments into association with the Contract Change Order.

Authorize Button

Authorize Clicking on the **Authorize Button** causes all the currently selected (highlighted) item installations to be authorized at the same quantity as they were installed.

Authorize All Button

The **Authorize All Button** allows users to authorize all item installations or pay estimates for a contract (depending on which window is open).

Authorize Item Installs Button

The **Authorize Item Installs Button** opens the Authorize Item Installation Window (a pay item must first be selected). This enables users to authorize the item installation(s) that have been recorded for a particular pay item.

Authorized Quantity

The quantity that a manager has authorized for a recorded installation. This amount may be equal to or less than the amount recorded by the technician.

Authorize an Installation

The process through which the manager "checks off" on all measurements and does or does not accept them. The manager authorizes the amount deemed appropriate, which could be less than the technician recorded.

Back Button

The **Back Button** on the Help Window allows users to display the previous Help Topic. By repeatedly clicking the **Back Button**, users can return to the first Help Topic called when opening the Help file. The keystroke is **Alt +B**.

Backing Out

The process used to cancel a price adjustment after the respective pay estimate has been approved.

Bid Item

Each task or material that the contractor bids to perform work on.

Bid Letting

The contract bidding system that determines the lowest bidder, to whom the contract is awarded.

Biweekly Progress Report Button

The **Biweekly Progress Report Button** allows users to access the Biweekly Progress Report Window, within which they can create, edit, and delete biweekly progress reports.

Browse Buttons

The **Forward** and **Backward Browse Button**s allow users to move through a sequence of related help topics. When the end of a group of help topics is reached, users can Browse the other direction or choose another topic from the Help Topics panel.

Cancel Button

The **Cancel Button** allows users to stop the CM&P System from acting on the command or information that they have entered. The window will usually close when this button is clicked, but users can re-open it as it was at their last save command.

Change Instruction Button

The **Change Instruction Button** allows users to enter the details about how a contract change order is to be completed.

Change Item Button

The **Change Item Button** accesses the Change Item Maintenance Window, from which users can create, edit, and delete a change item.

Change Order Button

The **Change Order Button** allows users to enter information about a correction to a contract. A Change Order in some way alters the cost or schedule involved in a contract. This button opens the Change Order Maintenance Window, in which users can create, edit, and delete a change order.

Change Reason Button

The **Change Reason Button** opens the Change Reason Window, in which users can create, edit, and delete change reason(s).

Claim

A financial discrepancy between the DOT and a contractor. Claims usually occur when the DOT is willing to pay less on an item installation than the contractor believes to be fair, in which case the claim ends in litigation.

Click

A computer term meaning to click on the button on the mouse once.

Close a Pay Item

All pay items must be closed before a contract can be finalled. Before a pay item can be closed, the authorized quantity must be equal to the contract and paid quantities.

Close All Pay Items Button

The **Close All Pay Items Button** allows users to simultaneously mark every open pay item in the contract as closed.

Close Pay Items Button

The **Close Pay Items Button** opens the Close Pay Items and Edit Pay Items Window, within which users may close pay items. By doing so, users are verifying that all scheduled item installations have been performed.

Close Window Button

The **Close Button** allows users to close the window by clicking on it.

Any information changes in the window will not be saved unless the **Save, Apply**, or **OK Buttons** have been used before the **Close Button**.

Conflicts Button

The **Conflicts Button** opens the Item Installation Resolution Window. This window allows users to resolve any conflicts encountered for the contract selected.

Contract Change Order (CCO)

A **contract change order (CCO)** lets users add additional work or materials to a contract after the initial contract is signed. The CCO can have the effect of changing specifications and/or the total dollar amount of the contract.

Contact Change Instruction

A **contract change instruction** is the information that will be sent to the contractor explaining how the change item(s) listed should be accomplished. By creating a contract change instruction, users essentially create a category into which change items will be assigned. For example, if change instructions entitled **Adjust Pipe Qty** and **Perform Misc. Work** are created, users would then specify which change items should be classified under the **Adjust Pipe Qty** instruction and which change items should be classified under the **Perform Misc. Work** instruction.

Contract Change Reason

A **contract change reason** is the recorded explanation for a contract change. By creating a contract change reason, users essentially create a category into which change items will be assigned. For example, if change reasons entitled **Additional Structure** and **Minor Variations** are created, users would then specify which change items should be classified under the **Additional Structure** reason and which change items should be classified under the **Minor Variations** reason.

Contract Days Button

The **(Manage) Contract Days Button** opens the Contract Days Window. This window enables project management to establish the first and last calendar dates that are to involve work on the contract. It is important to realize that the dates entered here are used to provide (via the handheld replication process) the technician(s) on the contract with the dates to record weather and other observations. It is also important to understand that the dates entered here should be broad enough to encompass any possible schedule delays, etc. There is no problem if the technician(s) have excess dates at the end of the contract, but there is a problem if management does not make the date range broad enough. The technician(s) is left in the field with no way of recording observations (because CM&P runs out of dates for which to do so).

Contract ID Number

The **Contract Identification Number** uniquely identifies a contract within the SD DOT.

Contract Issue

A formal record that a problem has been encountered at a construction location. By creating a contract issue, DOT personnel make an official record that a particular problem exists for the contract. This record plays an important role in the life of the contract because the CM&P System will not allow a contract to be finalled if any issues exist (i.e., if they have not been resolved).

Contract Issue Button

The **Contract Issue Button** allows users to record an issue that occurs at the site and affects the work being done on the contract. It is important that such issues be recorded (and properly resolved) so that problems can be promptly resolved so as not to impact contract schedule and cost.

Contract Log Button

The **(Manage) Contract Log Button** opens the Contract Log Window, in which users can record important information about the contract.

Contract Pay Item

An item bid as part of the contract.

Contract Phases Button

The **(Manage) Contract Phases Button** opens the Contract Phases Window. This window is used by contract management to divide a contract into several measurable groups based on date ranges. Dividing a contract into smaller time intervals enables management to more accurately set timelines for various tasks.

Contract Weather Day Button

The **Contract Weather Day Button** opens the Contract Weather Day Window where users can record and edit weather and contractor working day information.

Counties Button

Counties The **Counties Button** opens the Project County Maintenance Window, allowing users to add or delete counties for the project. Multiple counties can be assigned or unassigned at once by using the **Shift** or **Ctrl** keys to select multiple entries and then clicking on either the **Assign** or **Unassign Buttons**.

Each project must have at least one county assigned to it for the CM&P System to function correctly.

Create a New Change Request Button

The **Create a New Change Request Button** opens the Create a New Change Request Window, allowing users to enter information about a change request into the CM&P System.

Create a New Problem Report Button

The **Create a New Problem Report Button** opens the Create a New Problem Report Window, allowing users to enter information about a problem into the CM&P System.

Create a Visual Inspection Button

The **Create a Visual Inspection Button** opens a new visual inspection in the list panel of the Visual Inspection Window, allowing users to enter information about a visual inspection into the CM&P System.

Delete Button

The **Delete Button** allows users to permanently remove information, deleting the data displayed in the window.

Delete Supplemental Button

The **Delete a Supplemental Pay Estimate Button** allows users to remove a pay estimate that was created after a final pay estimate is approved. This option is useful for starting over if a large mistake was made in a Supplemental Pay Estimate.

Double Click

Clicking the appropriate mouse button twice.

Edit Change Request Button

The **Edit Change Request Button** opens the Edit Change Request Window, allowing users to edit change request information.

Edit Problem Report Button

The **Edit Problem Report Button** opens the Edit Problem Report Window, allowing users to edit problem report information.

Edit View Projects Button

The **Edit/View Project Button** allows users to add, change, and delete projects associated with each contract.

Edit View Subcontractors Button

The **Edit/View Subcontractor Button** allows the Project Engineer to view the percentage of the work that has been sublet to each subcontractor and to determine if he/she has the necessary Equal Employment Opportunity (EEO) information from each subcontractor.

Exit Button

The **Exit Button** allows users to exit the CM&P System. When this button is selected, all windows in the application will be closed, and users will be returned to the Windows desktop (or any other open application).

Filter Button

The **Filter Button** enables users to arrange information according to desired parameters. For instance, a window that consists of five columns can be filtered for only the desired information.

Final CCO

The last CCO intended to be developed during a contract. Any final quantities to adjust or final items to be added are included in this CCO.

Final Pay Estimate

The last pay estimate developed during a contract. Any items remaining to be paid for are included here.

Force Account Item of Work

When the DOT and contractor cannot agree on the price of an item, the DOT tracks the work on an hourly basis. Payment is then calculated "by hand," and the dollar amount is entered.

Group DOT 18's Button

The **Group DOT 18's Button** allows users to create a single DOT 18 from multiple DOT 18's.

Haul Road Items

Line numbers in the 900's that can be paid for in any quantity immediately. If additional 900 items are needed, they require a CCO but can be paid for before the CCO has been approved.

Help Button

The **Help Button** allows users to retrieve help from the application's electronic help file regarding questions or difficulties. If the specific information required is not supplied immediately, try searching the **Contents**, **Index**, or **Search Tabs** of the Help Topics panel displayed to the left of the main Help panel.

Help Topics Button

Clicking the **Help Topics Button** in the Help Window allows users to display or hide the Help Topics Panel to the left of the Help Topic currently displayed. The keystroke is **Alt+T**.

History Button

The **History Button** opens the Price Adjustment History Window, where users can review every adjustment made to the selected pay item throughout the contract.

Insert Button

The **Insert Button** inserts a row into an information window. This is necessary when performing such actions as adding a new user to the CM&P System.

Item Installation

A piece of recorded work; a single recorded measurement.

Item Installation Button

The **Item Installation Button** allows users to record item installations and site observations that are specific to an individual item installation.

Jump

Any word underlined by a solid green line is a jump. Jumps move users from one CM&P help topic to another as soon as the users click on the underlined word(s).

To return from a jump, click on the **Back Button** located at the top of the Help Window.

Liquidated Damage

Contractors are financially penalized for each day that their contracts go beyond the contract end dates specified. The amount of the penalty -- the liquidated damage amount -- is defined at the beginning of a contract using the **Identifying Tab** in the Manage Contract Window. Damages are dictated by the dollar size of the contract. A table specifies the exact damage rates to use. Liquidated damages are assessed in the Pay Estimate Maintenance Window.

Manage Contract Button

The **Manage Contract Button** allows users to access administrative-type information about a contract. This is also where management will go to set up a contract following bid award.

Materials Certification

Official certification that the materials used on a job have been tested and are certified as adequate by the DOT materials engineer.

Menu

A means of displaying and selecting commands and functions.

Menu Bar

File Goto Reports Administration Tools Window Help Located at the top of the window, below the title bar, this bar contains several menu items.

Minimize Window Button

Located in the upper right-hand corner of the window, the **Minimize Window Button** allows users to shrink a window on screen without closing it, so that they can move easily between it and another window.

A minimized window's information is not saved until users click on the **Save, Apply,** or **OK Button**.

Modify Button

The **Modify Button** causes the cells within the window to turn white, indicating that the information can be changed. To prevent inadvertent changes or deletions, it is recommended that users use the **View Button** after making all of the desired entries. The **View Button** returns the cells in the window to gray, which prevents changes from being made.

OK Button

OK The **OK Button** functions the same way as the **Enter Button** for the CM&P System, telling the system to accept the work or command entered.

Pay Estimate

A pay estimate is generated every two weeks and includes pay items specifying the work that should be paid for.

Pay Estimate Button

The **Pay Estimate Button** on the Pay Estimate Window Toolbar opens the Pay Estimate Maintenance Window.

Pay Estimate Button

The **Pay Estimate Button** opens the Pay Estimate Window, within which users can create and edit pay estimates.

Pay Estimate Item Button

The **Pay Estimate Item Button** opens the Pay Estimate Item Maintenance Window, within which users can create, edit, and delete pay estimate items.

Pay Item

An individual element of work that is to be performed during the contract and which CM&P entries allow to be tracked.

PCEMS Number

The Pre-Construction Engineering Management System (PCEMS) Number is a four-digit control number manually assigned by the Planning Department. This number also uniquely identifies a contract within the SD DOT.

Penalty Day

A penalty day is recorded for each day that work is performed beyond the established contract date.

Popup

Any word underlined by a dotted green line is a popup. A popup displays a brief description or definition of the underlined word. Clicking again anywhere on the screen will close the popup.

A popup does not change which help topic users are viewing. It merely layers another (usually smaller) window over the top of the first.

Price Adjustment

A positive or negative adjustment made to a pay estimate item to account for incentive pay, material deviations, or specification deviations.

Price Adjustment Button

The **Price Adjustment Button** allows users to access the Price Adjustment Maintenance Window, in which they can create, edit, and delete price adjustments.

Print Button

Print The **Print Button** allows users to print the material currently shown on the screen.

This will print the entire screen. Users may like to reposition the window before printing so that more items are visible.

Project

Each contract is subdivided into units of work called projects. Each **project** has a number assigned to it.

Project Number

A **Project Number** is comprised of multiple character combinations that indicate such information as prefix, highway number, route number, and agreement number and is used to identify each DOT project.

Record Work Button

The **Record Work Button** opens the Record Work Window, which enables users to create, edit, and delete recorded measurements.

Refresh F5

Selecting the **Refresh** menu option causes the CM&P System to recreate the screen with the most recently entered data included. The shortcut key for this option is **F5**.

Report Parameters Button

The **Reports Parameters Button** allows users to specify the desired parameters (i.e., which information to be included in the report.)

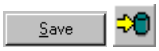
Resize Window Button

Located in the upper right hand corner of the window, the **Resize Window Button** (both appearances are shown here) allows users to increase or decrease the size of the window.

Royalty

If the DOT pays a landowner for material used on a contract, the cost of such materials is subsequently withheld from the contractor.

Save Button



The **Save Button** records all of the work performed since the last save command was performed. Users are encouraged to save information frequently to prevent losing data. Only saving changes or additions before closing the window will allow the changes to enter the CM&P System.

Scrollbar

Using the **scrollbar** or its arrows will move to the data or information that does not currently display on the screen.

Search Button

Once the desired type of number is specified, and the desired number entered in the Search For panel **Value** field, clicking on the **Search Button** will begin the search.

Select All Button

The **Select All Button** allows users to select all item installations listed for a contract line item.

Select Contract Button

The **Select Contract Button** allows users to return to the Select Contract Window.

Sort Button

The **Sort Button** allows users to view information sorted and arranged according to the desired parameter(s), for example alphabetical, numerical, or some other order.

Spelling Button

The **Spelling Button** allows users to check the spelling of the entered text for errors before saving it.

Split a DOT 18 Button

The **Split a DOT 18 Button** allows users to create multiple DOT 18's from a single DOT 18.

Stockpile

Materials delivered to the job site for use on a contract. The DOT may pay the price of the stockpiled materials before the contractor uses the materials in the job.

Stockpile Button

The **Stockpile Button** allows users to access the Stockpile Maintenance Window, in which they can create, edit, or delete a stockpile.

Supplemental CCO

A CCO that is generated after the final CCO is approved. This is used in instances where an approved final CCO exists but additional changes are still necessary.

Supplemental Pay Estimate

A pay estimate that is generated after a final pay estimate is approved. This is used in cases where a final pay estimate does not contain all pay items, as additional issues have occurred since the final pay estimate. A supplemental pay estimate would be created only if a supplemental CCO had been created.

Text Wizard Button

The **Text Wizard Button** in the Filter Data Window opens the Text Wizard Window within which users can specify letters, numbers, or words that must appear in filtered data.

Toolbar

A row of icons shown at the top of the screen, beneath the title and menu bars. By clicking on an icon, users can open a new window or perform a task.

Unassign Button

Use the **Uassign Button** to move highlighted items back from one field to the other.

Verify Button

The **Verify Button** on the Filter Data Window allows users to check their filter expressions before attempting to use them to control the data included in a report.

View Button

The **View Button** allows users to prevent unintentional changes from being made to the currently active window. By selecting the **View Button**, users are instructing the application to protect the displayed information from changes until the **Modify Button** is selected.

Visual Inspection Button

The **Visual Inspection Button** opens the Visual Inspection Window, allowing users to enter or edit visual inspections for pay items in the contract.

Work Authorization

An authorization for contractors, allowing them to add work or materials. Work authorizations enable the contractor to begin work before a CCO is approved. This is done to "speed up" the work process. A work authorization is followed by a CCO.

Work Authorization Button

The **Work Authorization Button** opens the Work Authorization Window, in which users can create, edit, and delete work authorizations.

Zero Out

Used when there is a need to delete a price adjustment and its associated pay estimate item when the pay estimate has been approved. Rather than deleting the price adjustment, zeroing out produces another price adjustment to balance the original. The result is a zero balance. This is automatically created by the system.

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