

## Minutes from the 1999 Construction Management TAG

Atlanta, Georgia - October 6, 1999

Cora Sharp called the meeting to order at 8:30 a.m. Members were introduced.  
[Additional TAG activities after the meeting have been added to the minutes.]

### The following TAG members were present:

Cora Sharp - Georgia  
Tim Lindberg - South Carolina  
Paul Newman - Colorado  
Alton Treadway - Alabama  
Dawn Scheel - Texas  
Mark Bortle - Iowa  
Shirley Daugherty - Nebraska  
Joe Bouchey - Connecticut  
Jim Snyder - Indiana  
John Oberdiek - Missouri  
Wayne Weick - Louisiana  
Ron Gray - Vermont

### Three members were changed during the meeting:

Tom Kratochvil - New Mexico  
Gina Bock - Missouri  
Susan Powe - Alabama

### One new member was added:

Bruce Stapleton - New Brunswick

Overall, there were 55 attendees of the TAG meeting, including TAG members, Infotech representatives, and visitors.

Alton Treadway moved to accept the minutes from last year's meeting in Portland, Maine, and Mark Bortle seconded the motion. All voted in favor and the minutes were accepted.

### Mission Statement -

A review of the Mission Statement confirmed it as written.

" To provide a forum for users of AASHTO Trns\*port CAS and SiteManager to discuss issues related to their respective licensed modules and to discuss proposed enhancements to said modules, thereby making recommendations to the User Group general body."

### Short term goals -

The short term goals were reviewed and amended as follows:

Ensure the successful implementation of SiteManager ~~and a successful transition of the MSE to InfoTech from MCI.~~ . The successful implementation of Trns\*port Client Server software.

### Long term goals -

The long term goals were reviewed and confirmed as written.

Ensure the Trns-port construction/contract administration software continues to be upgraded and enhanced to meet the users needs. The successful implementation of Trns\*port Client Server software.

Jeff Derrer, Chair of the Trns-port Task Force (TTF) came to discuss the TTF's role and recent issues. Release 2.0 of SiteManager occupied much of the September TTF meeting. What constituted urgent was discussed – “something that prevents you from doing day to day activities”. They asked four people - Shirley Daugherty, Jim Johnson, Paul Newman, and Lonnie Jones - to review the current TMR list and determine which ones should be resolved immediately. InfoTech has posted a new patch to SiteManager on September 30<sup>th</sup>, which addressed a number of TMR's. Last week six other items were identified directly related to paying an estimate that would have to be fixed. Later this month another patch to address other important items will be posted. Jeff said that ITI has committed to getting these fixes taken care of as soon as possible.

Jeff then asked for this TAG to form a subgroup to look over the TMR items for the coming year and provide feedback to the TTF on what is truly urgent. Suggest this subgroup of 4-5 people look at issues specific to the construction issues of SiteManager. The Materials TAG formed the same type of group at their meeting yesterday.

Alton Treadway moved and Shirley Daugherty seconded to form a TAG subgroup to monitor and prioritize the TMR's for the TTF. The motion unanimously passed.

Issues for them to outline: How to communicate and How often?

A discussion followed on how best to communicate.

Use of a list server - one for materials and one for construction administration was discussed. Indiana expressed a concern about fragmenting the issues and the materials group going off on their own. Vermont expressed their opinion that this was a good idea. They believe this is specializing the issues and not fragmenting them. It was agreed to use the list server and it makes sense to split them up along the lines of the TAGs. Anyone may subscribe to one or all lists.

Discussion followed regarding whom should be on this subgroup. All TAG members were interested in serving, but to keep it to a manageable size a group of five was selected based on having the software in production, or moving rapidly toward production and having resources available to support the subgroup.

The following states were appointed to the subgroup:

- Texas - Dawn Scheel
- New Mexico - Tom Kratchovil
- Missouri - Gina Bock
- New Brunswick - Bruce Stapleton
- Alabama - Susan Powe

[The subgroup met the following morning. They chose to be called the Construction Issues Review Team, or CIRT. They refined issues like scheduling conference calls, review dates, list service, defining priorities, and subdividing focus areas. They also met with Infotech representatives on Thursday to coordinate efforts. Shirley Daugherty provided guidance on TTF procedures.]

An official liaison with the TTF is needed and Shirley Daugherty agreed to fulfill this role.

## **BALLOT ITEM REVIEW**

### Items to be deleted:

DW101 is essentially the same as DW133, ALDOT withdraws DW101.

We agreed that the following items should be re-classified as maintenance items: DW90, CA192, TE103, and TE176.

### To be rewritten and/or refined by the submitting states:

CA-217 - Insurance Issue - This is of interest to Missouri, Texas, Alabama, Arkansas. Texas will refine this issue and resubmit.

CD-15 - Texas agreed to change this item and instead add the contractor signature line on the Change Order Report

CP-142 Missouri wanted to clarify this issue. Yes this could be handled manually but a system parameter would ensure nothing gets overlooked. New Mexico reinforced the importance of this area. The Project Manager gets message when estimate is ready for review. They need to review discrepancies.

TE-183 - Reinforced Texas submittal of this enhancement. Indiana supported this as an issue. They like some additional security at the tab level and field level for certain parts of SiteManager. States interested in improving security instances should send comments to Dawn Scheel, TxDOT, for inclusion in the refined ballot item.

ITEM MASTER Issues - send to jsnyder@indot.state.in.us or TUG list server. Jim is heading a TUG subcommittee looking at the Item Master across all Trns\*port modules, not just in SiteManager.

After clarification by the submitting states, the TAG agreed to move up in priority on the ratings list the following items: CA 217, CP142, and TE 183. Ballot results may differ. There was a brief discussion on how states may choose to allocate their points for SiteManager ballot items, such as choosing their top ## priorities instead of distributing the points across all the ballot items.

### Enhancement items that were not included on the Ballot list:

Georgia will be funding CP145, CP101, CP106, DW132, and DW64.

Florida will be funding D87, G71, CA10, CP74, TE88, and TE97.

Nebraska will be funding CD31, and CD54.

Colorado and Virginia will be jointly funding CA119.

Alton from ALDOT suggested adding a “defective spec” category - not meeting the original intention of the specification – in addition to the 1 thru 5 categories currently available. New Mexico enforced this as an issue and liked this idea. This is an issue to be dealt with by the TTF.

## **OTHER ENHANCEMENTS BROUGHT BEFORE THE GROUP:**

ALABAMA - Susan discussed and reviewed the calculation enhancements. No price yet from InfoTech. Showed the functionality to the group on the screen to associate information to a bid item. Not tied directly to the Item Master; this link of item codes and templates would be a child code table in SiteManager. Very similar function to Materials Templates – all results would be stored in a single table. [This was submitted and accepted as a ballot item during the business session on Friday.]

IOWA - Mark Bortle discussed pen front end to SiteManager as enhancement. Iowa is seeking to get states together with a stake in this issue as a joint funding development.

NEBRASKA - Want to look at allowing the contractor to use Expedite-type format to load subcontract request info electronically into SiteManager. Make it as simple as possible at first then maybe more detail later on. [A meeting was held in the Demo room on Thursday to discuss this topic with Infotech reps.]

NEW MEXICO - Tom Kratochvil

- Stockpile functionality not as flexible as needed. Not decrementing additions to stockpiles properly.
- CO process and final quantity CO needs reviewed
- Reports print all pages and not just the ones you need; should have Windows standard ability to select individual or a range of pages.

TEXAS - Ensure new DBE rules etc are kept up to date in SiteManager.

ALABAMA - Offered Powerbuilder code donations to InfoTech of items they have fixed themselves. These would become part of the generic product, as opposed to custom Alabama fixes. This offer will not circumvent the normal approval process for adding modifications to the generic product. This could represent a cost and time savings for all states in resolving maintenance issues, and could represent savings in cost and time for adding enhancements to the generic product. [Tom Rothrock and Alton Treadway had some follow-up discussions on this topic. Needs review by the TTF.]

COLORADO

Suggests that RTF be incorporated in the SiteManager product for use in modifying the generic reports and as an option for creating state-specific custom reports. [This was submitted and accepted as a ballot item during the business session on Friday.]

Shirley Daugherty discussed the TTF process for approving changes to the generic Trns\*port products, including Ballot items and state-funded enhancements.

Cora informed the group that all proposed enhancements would need to be formally written up and sent to Info Tech for consideration on the ballot. [Clarification from the TUG chair led to the calculation item and the RTF item being presented at the Friday business session for inclusion on the 1999 Ballot list.]

The meeting was adjourned at 3 p.m.