

MoDOT Trns*port™ SiteManager™

Quick Reference Guide

Contract Activation

CONTRACT ACTIVATION DOCUMENTATION

Fields that are editable during the activation process are in this text color. Only change these fields if stated to do so.

Fuel adjustment information is in this text color.

Contract Administration.Contract Records.Items

Verify the following for **all** items in the contract:

- Description (If it is a misc. check the Supplemental Description).
- Correct specification year
- Correct Units type
- If there is more than one category, check the category.
- Unit Price
- Bid Quantity
- Check the Major Item box if it is 10% or more of the Contract Price (if combination, 10% or more of the Project).
- Check the Specialty box if it is a Specialty item (check the 'Job Special Provisions Table of Contents' for a Specialty section. If there is a Specialty Section, the specification numbers will be listed. The Item Code reflects the Specification Number)

Contract Administration.Reference Tables.Vendors

Description Folder Tab

- Open the Prime Contractor for the contract in the Vendor Pick List window.

All fields should be ok.

The Gender and Ethnic Group fields are editable. Do **not** select either one of these.

Personnel Folder Tab

The name of the President of the company is on the pink page of the contract. Add the name of the President of the company.

- Focus in the 'Person Name' window and select the new icon.
- Populate the **Person Name**, and **Officer Title** text boxes.
- Do **not** populate the Ethnic Group, SSN and Gender selections.

Add the payment address for the Contractor.

- Select **Services**, and then **Address** from the pull down menu.
- Highlight the **Home Office** selection.
- Write down the City and State/Province.
- Highlight all of Line 1 of the address and copy it (Control C).
- Select the **Payment Address** selection.
- Paste the information into Line 1(Control V).

- Type in the **City**.
- Select the **State**.
- Go back and forth between the Home Office and Payment Address copying and pasting all information into the **Payment Address** fields.

Associates Folder Tab

Add the Vendor ID for the **Insurance** Company.

- Select the New icon and search for the correct Insurance Company with the associated correct Vendor Type.

Note: If the correct Vendor is not a selection, it will need to be created (see the Creating a Vendor section below).

Add the Vendor ID for the **Surety Insurance** Company.

- Select the New icon and search for the correct Surety Insurance Company with the associated correct Vendor Type.

Note: If the correct Vendor is not a selection, it will need to be created (see Creating a Vendor below).

Creating a Vendor

Insurance IDs start with 0050000

Surety Insurance IDs start with 0060000

- Navigate to Contract Administration.Reference Tables.Vendors
- Find the last ID number used from the Vendor Pick List window (the open icon will bring up the Vendor Pick List window).
- Type in an ID for the Company that follows the last number used in the Vendor Pick List window.
- Type in the Short name.
- Type in the Full name.
- Select Services and Address from the pull down window.
- Type in the Payment Address (this is found on the pink sheet of the contract).
- Place the focus of the cursor in the Description window and select the Save icon.
- The Vendor Type, DBE Type, Cert Date, Corp Type, Prequal Date, IRS Tax Nbr, Alt Vendor ID, Cert Type, Cert End Date, Corp State, Prequal End Date fields are editable. Do **not** edit them.

Contract Administration.Contract Records.Projects

Before continuing, check the contract to see if the '**Rejection of Special Provision for Price Adjustment for Fuel**' has been signed by the contractor. This signature page is located a couple pages before the pink sheets of the contract.

- If it **has** been signed, the contractor is rejecting any adjustments for fuel.
- If the contractor did **not** sign it, the contractor will get adjustments for fuel. There are three areas in SiteManager that need to be populated for the fuel adjustment. These areas will be stated in the Project and Contract sections of this QRG.

For each Project associated with the contract do the following:

- Open the Project associated with the contract.

Description Folder Tab

- Verify the **Fed St Project Nbr.** is the FA number for your contract (if there is federal funding). If the contract is 100% state funded, then this text box should be populated with the J number for the contract.

- Change the **Status** to Project Awarded
- Check the **Project Type**
- Check the **Work Type**
- Select the **Surface Type** (this information is on the Itemized bid quantities for each project).
- Select the **Road System** (Interstate, Primary, County, etc.).
- Verify **Beg & End Stations** or **Log Miles**
- Check the **Engineering Percentage** (this should be set at 10%).

Do not edit any other editable fields.

Counties Folder Tab

- It will ask you if you want to save changes. Select Yes.
- Check for the proper county.
- Select the Save Icon.

Adjustment Indices

- If the contractor has selected to have the fuel adjustment on this contract, add the Fuel Adjustment to the table on the right.
- Select the Save Icon.

Contract Administration.Contract Records.Contracts

Contract status will be pending. Check the following and make the changes needed:

Description Folder Tab

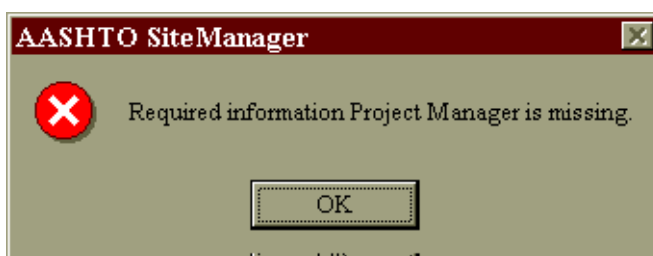
- Verify that the **federal/st project number** is correct. This is the FA number assigned for the contract. If this isn't a Federal contract, type the J Number into this text box.
- Select the correct **Primary PCN** (Project Control Number), from the drop down list.
- Verify that the district is correct. If not, select the correct district.
- If the Org Code field is blank, check the drop down list for Org code. If list is blank, do nothing. If Org Codes are in there, select the correct Org Code (this information is in the Construction Directory).
- Note the funding. This cannot be changed in this area of the program.
- During the switch over process, the Bid Days quantity needs to be changed. The Bid Days quantity needs to reflect the amount of working days left on the job before completion of the last estimate. To change the Bid Days, select the Time Charges drop down list and select the correct choice available.

Note: If the Time Charges selection is right, you will still have to re-select it to make the Bid Days field editable.

If it is a Fixed Completion Date, select Fixed Completion Date.

- Verify the bid amount.
- Select the right **Contract type** (it should be right).
- Select the correct **Work Type** (it should be right).
- Select the Wage decision.
 1. Focus in the lower portion of the window to add the wage decision information.
 2. Select the **new** icon.
 3. Search in the first text box (Wage Decision ID). Select the only wage decision available.

- Do not edit the Status, Variance Pct, Spec Yr, Unit System, Suppl Spec Bk Yr, Alt ID, fields.
- Select the Save icon. The following message will appear:



- Select OK (it will navigate you to the Primary Personnel Folder Tab).

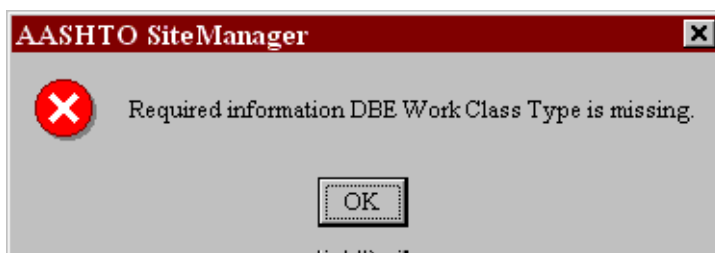
Primary Personnel Folder Tab:

- Add the User ID for the **Project Manager** of this contract (for now, select the RE of the contract unless otherwise known).
- Add the User ID for the **Project Engineer** of this contract (select the RE of the contract).
- Leave the **Contract Designer** populated with what comes through.

Add the following Notification Recipients:

- **Contract Status Changed to Active** - Leave blank at this time.
- **Work Progress Behind Schedule** - Leave blank at this time.
- **Civil Rights Exception Report Generated** - Leave blank at this time.

Select the Save icon. The following message will appear:



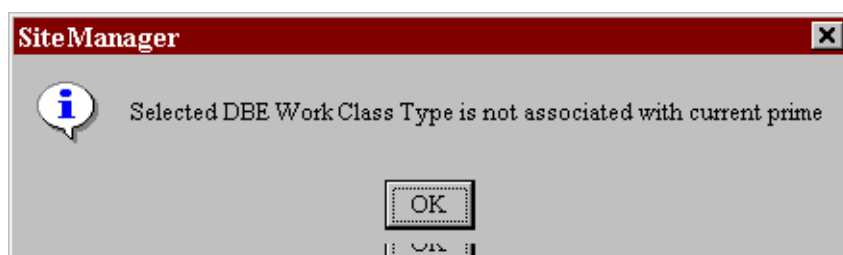
- Select OK (it will navigate you to the DBE Commit Folder Tab).

DBE Commit Folder Tab:

- Select 'Contact System Administrator' in the **DBE Work Class** drop down list .

Do not edit the **DBE Goal Percent** field.

Select OK for the informational message (Figure).



(Figure)

Training Plan Folder Tab:

- Type in the **Planned Training Hours**, **Training Unit Price** and **Planned Number of Trainees** text boxes (this information is located in the contract).

Location Folder Tab:

- Verify the **Beg Sta. Nbr./End St. Nbr.** or **Beg Termini** and **End Termini** text boxes are populated with the correct information.

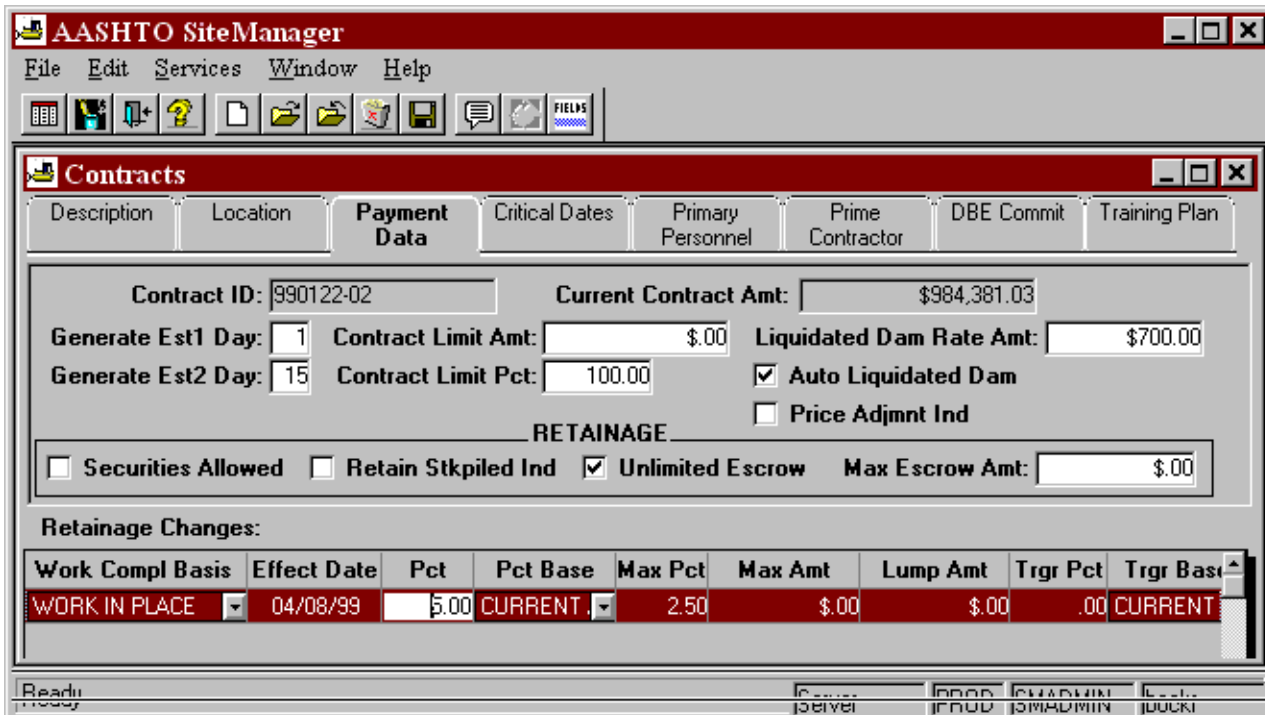
Note: If the contract includes combination jobs, the information populated (stations or miles), needs to be deleted (it will only be set for one job).

- Select the correct **Road System**.
- Select the correct **Highway Type**.
- The primary county should be selected. Verify that it is the correct one.

Do not edit the Location or Town text boxes.

Payment Data Folder Tab:

- Verify the current contract amount is correct.
- Set **Generate Est1 Day** to **1** and **Generate Est2 Day** to **15**.
- Leave the **Contract Limit Amt** as **zero**.
- Add the **Contract Limit Pct** to **100%** if it is not already populated.
- Add the correct **Liquidated Dam Rate Amt** for your contract. This information is contained in the hard copy contract.
- Select the **Auto Liquidated Dam** checkbox.
- If the contractor is getting the Fuel Adjustment, select the **Price Adjmnt Ind**.
- Verify the only **Retainage** Indicator checked is **Unlimited Escrow**.
- Do not change the "Retainage Changes" portion in the lower window. It should match the figure below (Figure).



Critical Dates Folder Tab:

- Add the Execution Date (this is the same as the Award date).
- Add the Notice to Proceed date (this information is on the Bid Award text file on the Intranet).

Do not edit the Distribution List, Recipient ID or Message Text text boxes.

If the contractor is getting the Fuel Adjustment, populate the Price Adjustments Base Date with the Award Date.

Prime Contractor Folder Tab:

Add a prime contact to the Prime Contacts window.

- Place the focus of your cursor in the Prime Contacts window.
- Select the new icon.
- Use the Search feature to select the Prime Contact of the construction company.
- Select the correct Contact Type from the drop down list.

Select an address for the Prime Contact.

- Place the focus of your cursor in the Prime Contacts window.
- Select **Services | Address** from the pull down menu.
- Select the Prime Contact's address.
- Select **Services | Select Address** from the pull down menu.

Select a Prime Associate (Insurance Company), for the contractor.

- Place the focus of your cursor in the Prime Associate window.
- Select the new icon.
- Use the Search feature to select the Insurance Company.

Select a Prime Associate (Surety Insurance Company), for the contractor.

- Place the focus of your cursor in the Prime Associate window.
- Select the new icon.
- Use the Search feature to select the Surety Insurance Company.

Description Folder Tab:

- Change the status to Active.
- Select the Save icon.

Contractor Payments.Reference Tables.Contract Payment Approval Levels

Set the Contractor Payment Approval Levels as shown in the table below.

Level Nbr	Description	User Group
1	Project Manager	Construction Project Manager Dx (x = District location of the contract)
2	Resident Engineer	Construction Resident Engineer Dx
3	Business and Benefits	Business & Benefits - Estimate Approval

- Select the Save icon.

Materials Management.Contract Materials.Contract Materials

Notify the correct Materials personnel that the Contract has been activated.

Materials will print out the Item list, Generate the Outstanding Item List and the Sampling and Testing Requirements

Contract Administration.Contract Records.Contract Authority

The System Administrator needs to send a letter to the RE requesting a list of names working on the contract.

Select the open icon.

Select the contract.

Use the Search feature in the User Group Description Field to select the users names.

Select the Save icon.