



LPA SiteManager

Quick reference guide

LPA SiteManager

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Workflow

1. PE or PM creates or edits DWRs
2. PE approves DWRs on Diary
3. PM generates estimate
4. PM or PE print the LPA-001 and LPA-002 using the process lists
 - a. If changes to estimate are needed:
 - i. PM deletes the estimate from history window
 - ii. PE un-approves DWRs on diaries that need changes
 - iii. Return to step 1
5. PM approves estimate
 - a. If changes need to be made after approval:
 - i. PE rejects the estimate
 - ii. PM deletes the estimate from history window
 - iii. PE un-approves DWRs on diaries that need changes
 - iv. Return to step 1
6. PE approves estimate
 - a. If changes need to be made after approval:
 - i. Call Billy Owen, Jennifer Kiihnl or Pam Schmidt – they will log in as CADPAY and reject the estimate
 - ii. PM deletes the estimate from history window
 - iii. PE un-approves DWRs on diaries that need changes
 - iv. Return to step 1

Daily Work Reports

Navigation: Main Panel ->Daily Work Reports



Daily Work Reports

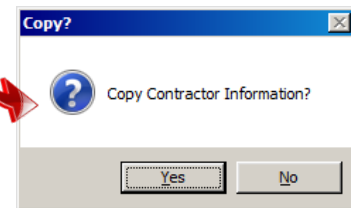
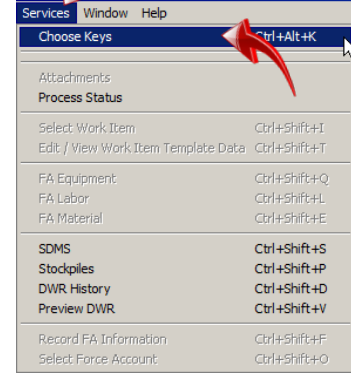


1. For your **first** DWR click Services-> Choose Keys. Double-click on the Contract ID.

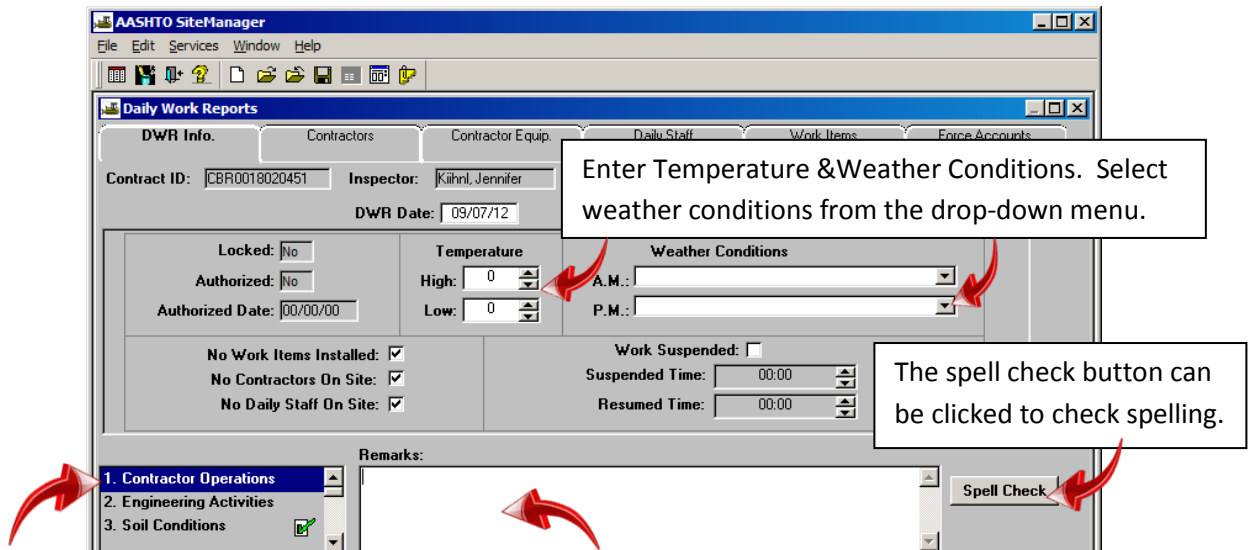
After your first DWR, click open to select a contract. Double-click your name, and then double-click the date you wish to open.

2. Key the correct date or double-click the date field to open a calendar. Select the date from the calendar.
3. If Contractor Information has been entered on the **Contractors** tab of the currently opened DWR, you will be given the option to copy contractor information. If you click Yes, information from the **Contractors, Contractor Equip.** and **Daily Staff** tabs will be copied to the new DWR. **Temperature, Weather Conditions, Remarks** and **Work Items** information are not copied.

If you are already in a DWR and wish to create a new one under your name, click the new button .



DWR Info. tab



Enter remarks by clicking on the remark type, then key information in the text box. The following remarks are required:

- Contractor operations
- Engineering activities
- Soil conditions
- Rain/precipitation

As remarks are entered, a green check-box displays next to the remark type. In the example shown here, **Soil Conditions** has a remark associated with it. These remarks can also be pasted from some other document – such as a Word document. These remarks print on the diary.

Click save or when changing tabs, click Yes on the prompt.


Contractors tab

Click on the **Contractors** tab.


1. Click in the **Contractor** portion of the window and click the new button.

2. Add the contractor that was on the job for this day from the dropdown list.

The **Supervisor/Foreman Name** section is not used.

3. Click on the **Personnel Type** portion of the window. Click the new button  and add personnel types from the drop-down list. Enter **Number of Persons** and **Hours Worked**. Click new to add more personnel types as needed. This will add more personnel types for the contractor that is highlighted in the **Contractors** portion of the window.

Repeat steps 1 – 3 until all contractors, subcontractors and their personnel on the jobsite are recorded.

To delete an entry, highlight the item in the proper window section. Click the delete button  on the toolbar.


Click save  or when changing tabs, click Yes on the prompt.

Contractor Equip. tab

Click the **Contractor Equip.** tab.


The contractors in this window are the same as those on the **Contractors** tab.


1. Highlight the correct contractor in the **Contractor** portion of the window.

2. Click in the **Equipment ID** portion of the window and click the new button .

3. Select equipment on the jobsite for that day (not necessarily used.)
4. Enter the **Nbr. Of Pieces**, **Nbr Used** and **Hours Used**.
5. Click the New button to add as many equipment types as necessary.

Repeat steps 1 – 5 for any subcontractors that have equipment on the project site.

To delete an entry, highlight the item in the proper window section. Click the delete button  on the toolbar.

Click save  or when changing tabs, click yes on the prompt.

Daily Staff tab


Click on the **Daily Staff** tab.

1. Click in the staff member portion of the window and click the new button.

2. Select office staff from the drop down list.

3. Key hours in **Reg. Hours** field (MDOT is not using **OT** hours).
4. Enter **Vehicle ID** if applicable.
5. Enter **Starting** and **Ending Mileage**. MDOT is not using the **Work Code** field.

Repeat steps 1 – 5 until all staff working on the project for this day have been entered.

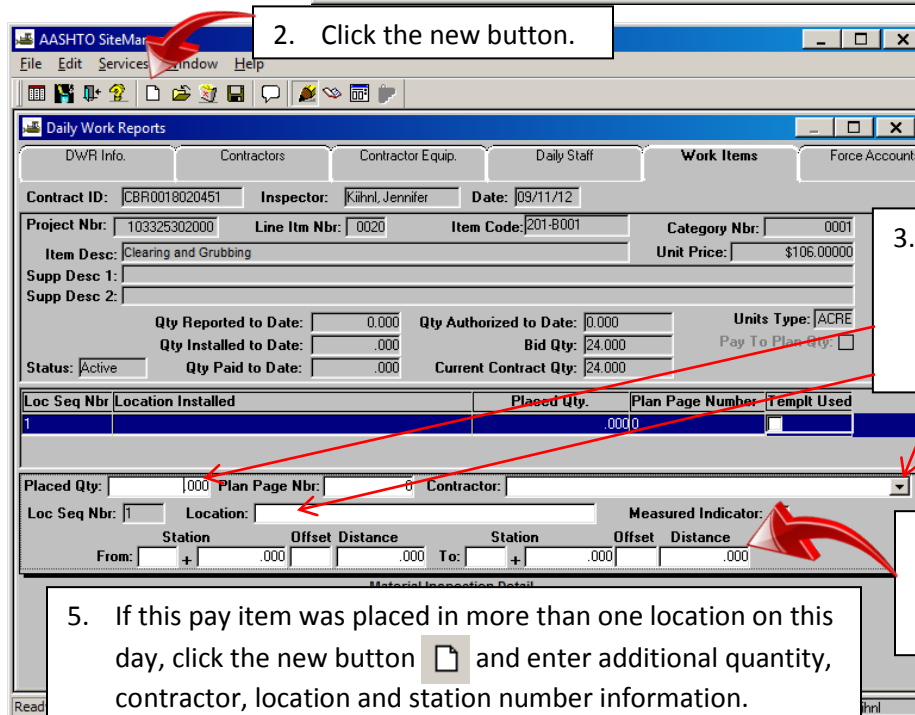
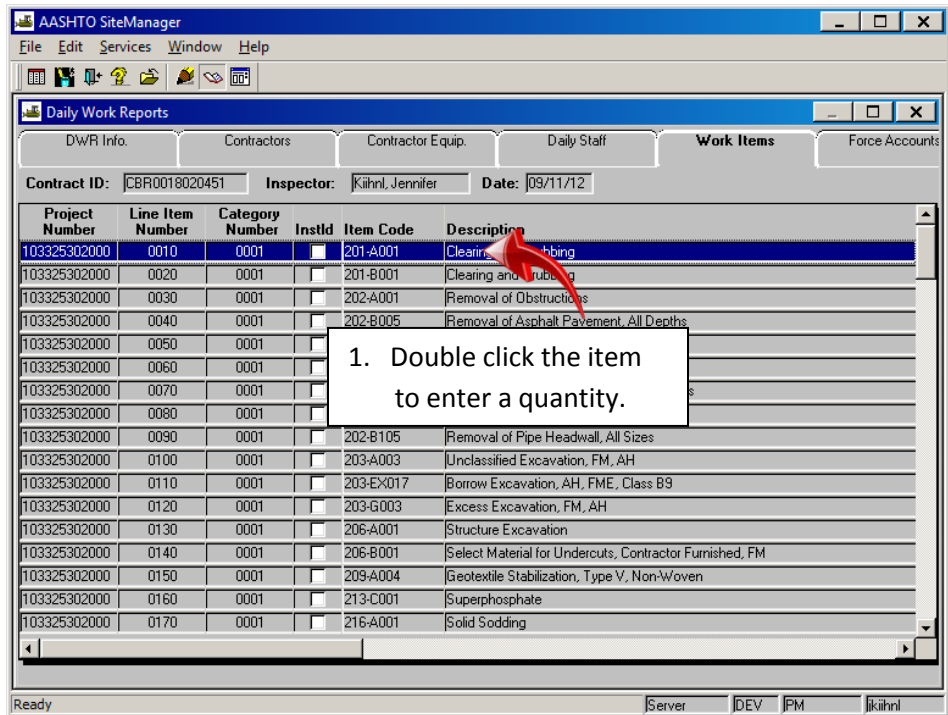
To delete an entry, highlight the item in the proper window section. Click the delete button  on the toolbar.

Click save  or when changing tabs, click yes on the prompt.

Work Items tab


Click on the **Work Items** tab

In order to place an installed quantity on a work item, a contractor must be selected on the **Contractors** tab.



To enter more items, click the **Select Work Items** button  and repeat steps 1 –5 .


Note: The quantity installed to date and quantity paid to date do not update until the applicable estimate for these quantities is approved.

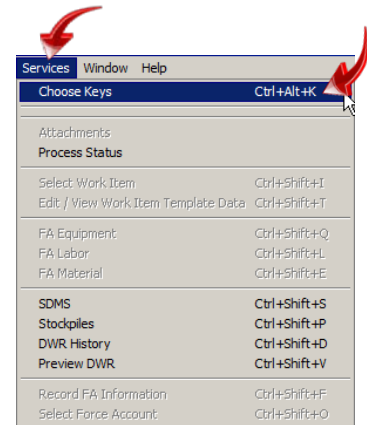
Click save .

Diary

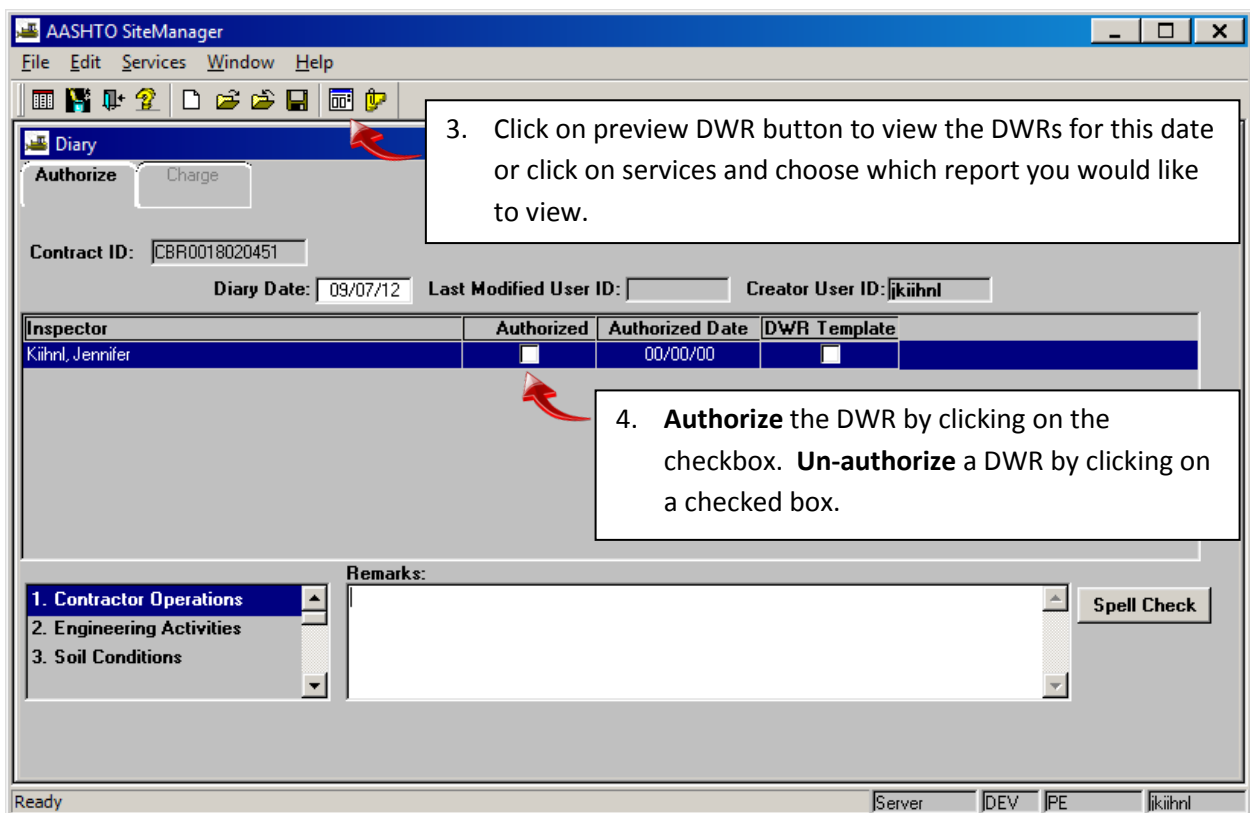
Navigation: Main Panel ->Daily Work Reports



1. For your **first** Diary, click Services-> Choose Keys. Double-click on the Contract ID.
After your first DWR, click open  to select a contract. Double-click the date you wish to open.
2. Key the correct date or double-click the date field to open a calendar. Select the date from the calendar.



The DWRs associated with that day will display for authorization.



3. Click on preview DWR button to view the DWRs for this date or click on services and choose which report you would like to view.

Inspector	Authorized	Authorized Date	DWR Template
Kiuhnl, Jennifer	<input type="checkbox"/>	00/00/00	<input type="checkbox"/>

4. **Authorize** the DWR by clicking on the checkbox. **Un-authorize** a DWR by clicking on a checked box.

Remarks:

- 1. Contractor Operations
- 2. Engineering Activities
- 3. Soil Conditions

Spell Check

Repeat steps 2 – 4 for any DWRs that need authorized on a Diary.

Click save  to save changes.

A DWR template involves haul tickets and is not applicable in LPA SiteManager.

Estimates include only Work Item information from DWRs that have been authorized.

If you wish to print the diary, save it to your local machine. Then open the document and print it locally (instructions for another way to print the diary are on page 19).

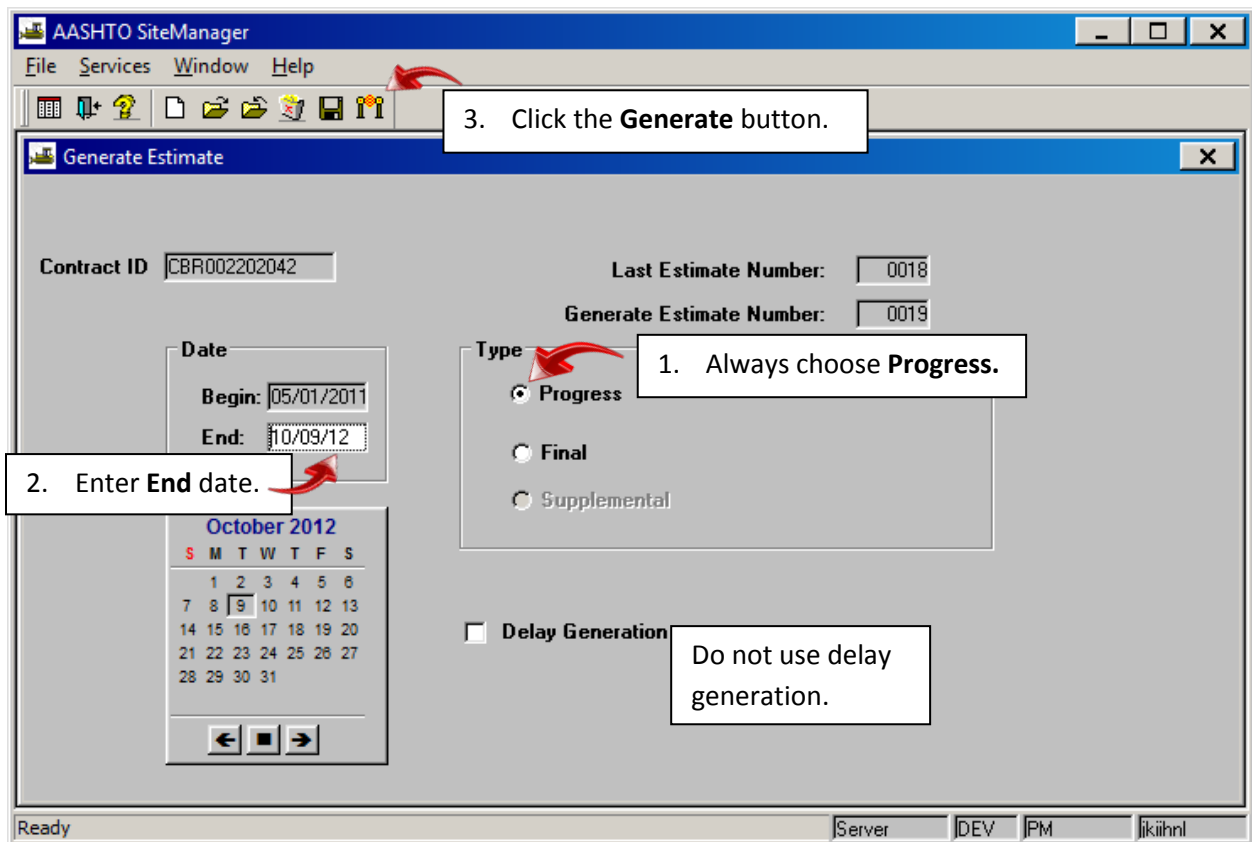
Estimate

Generate an Estimate

Only a **Project Manager** can generate an estimate.

Navigation: Main panel ->Contractor Payments  Estimate  Generate Estimate 

Double-click on the contract or click open  to select a contract.




Click OK on the popups (“Process OCPINTESA submitted” and “Profile OCPINTESA for process SMBAPP has completed”).

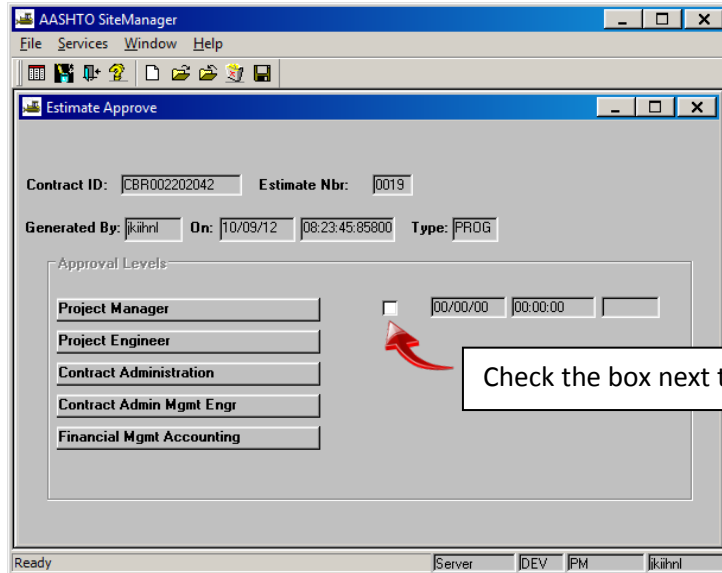
Approve an Estimate


Navigation: Main panel ->Contractor Payments Estimate Estimate Approval



Double-click on the Contract ID or click open  to select a contract.

The Project Manager may approve an estimate in Pending status. The Project Engineer will approve an estimate after the Project Manager has approved it.



Click save .


Discrepancies may exist. This is ok until the final. Click Yes on the discrepancy pop-up window.

Click OK on the notification pop-up window.

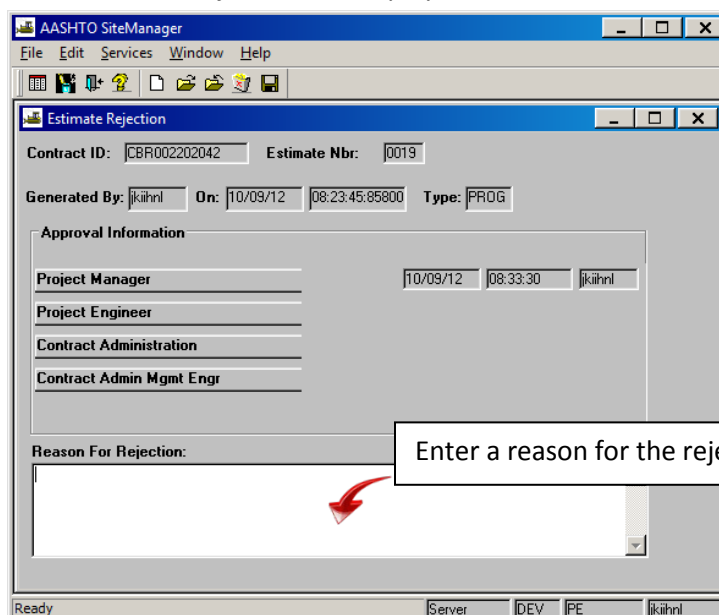
Reject an Estimate


Navigation: Main panel ->Contractor Payments Estimate Estimate Rejection



Double-click on the Contract ID or click open  to select a contract.

Only contracts that are available for rejection will display in the list of contracts.



Click save .

Click OK on the notification pop-up window.

View Estimate History/Delete an Estimate

Navigation: Main panel -> Contractor Payments Estimate Estimate History



Double-click on the Contract ID or click open to select a contract.

This allows you to view estimate history for a contract.

Estimate Number	Net Pay	Period End Date	PM User ID	PM Appr. Date	Last Appr. User ID	Last Appr. Date	Est Stat	Est Type
0019	\$405,501.00	10/09/12	jkiihnl	10/09/12	jkiihnl	10/09/12	INAP	PROG
0018	\$96,259.32	04/30/11	rshannon	05/10/11	sgibbons	05/16/11	APRV	PROG
0017	\$143,601.82	03/31/11	rshannon	04/06/11	sgibbons	04/15/11	APRV	PROG
0016	\$268,170.74	02/28/11	rshannon	03/04/11	sgibbons	03/11/11	APRV	PROG
0015	\$9,955.41	01/31/11	rshannon	02/09/11	sgibbons	02/15/11	APRV	PROG
0014	\$227,267.80	12/31/10	rshannon	01/12/11	sgibbons	01/18/11	APRV	PROG
0013	\$182,875.81	11/30/10	bowen	12/09/10	sgibbons	12/20/10	APRV	PROG
0012	\$422,532.11	10/31/10	bowen	11/09/10	sgibbons	11/15/10	APRV	PROG
0011	\$137,782.56	09/30/10	bowen	10/11/10	sgibbons	10/19/10	APRV	PROG
0010	\$216,954.92	08/31/10	rshannon	09/03/10	sgibbons	09/20/10	APRV	PROG
0009	\$365,701.15	07/31/10	bowen	08/13/10	sgibbons	08/16/10	APRV	PROG
0008	\$141,683.26	06/30/10	mobannon	07/01/10	sgibbons	07/13/10	APRV	PROG
0007	\$252,819.30	05/31/10	mobannon	06/01/10	sgibbons	06/14/10	APRV	PROG

If an estimate is rejected, a Project Manager can delete the estimate. This is helpful when quantities are in error on a DWR. Once the estimate is deleted, the Project Engineer can unauthorize DWRs on the Diaries. Quantities can be corrected, the DWR can be reauthorized on a Diary and the Project Manager can regenerate the estimate.

Estimate Number	Net Pay	Period End Date	PM User ID	PM Appr. Date	Last Appr. User ID	Last Appr. Date	Est Stat	Est Type
0019	\$405,501.00	10/09/12	rshannon	00/00/00	sgibbons	00/00/00	RJCT	PROG
0018	\$96,259.32	04/30/11	rshannon	05/10/11	sgibbons	05/16/11	APRV	PROG
0017	\$143,601.82	03/31/11	rshannon	04/06/11	sgibbons	04/15/11	APRV	PROG
0016	\$268,170.74	02/28/11	rshannon	03/04/11	sgibbons	03/11/11	APRV	PROG
0015	\$9,955.41	01/31/11	rshannon	02/09/11	sgibbons	02/15/11	APRV	PROG
0014	\$227,267.80	12/31/10	rshannon	01/12/11	sgibbons	01/18/11	APRV	PROG
0013	\$182,875.81	11/30/10	bowen	12/09/10	sgibbons	12/20/10	APRV	PROG
0012	\$422,532.11	10/31/10	bowen	11/09/10	sgibbons	11/15/10	APRV	PROG
0011	\$137,782.56	09/30/10	bowen	10/11/10	sgibbons	10/19/10	APRV	PROG
0010	\$216,954.92	08/31/10	rshannon	09/03/10	sgibbons	09/20/10	APRV	PROG
0009	\$365,701.15	07/31/10	bowen	08/13/10	sgibbons	08/16/10	APRV	PROG
0008	\$141,683.26	06/30/10	mobannon	07/01/10	sgibbons	07/13/10	APRV	PROG
0007	\$252,819.30	05/31/10	mobannon	06/01/10	sgibbons	06/14/10	APRV	PROG

Tracking an Estimate

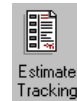
Navigation: Main panel ->Contractor Payments




Estimate



Estimate Tracking

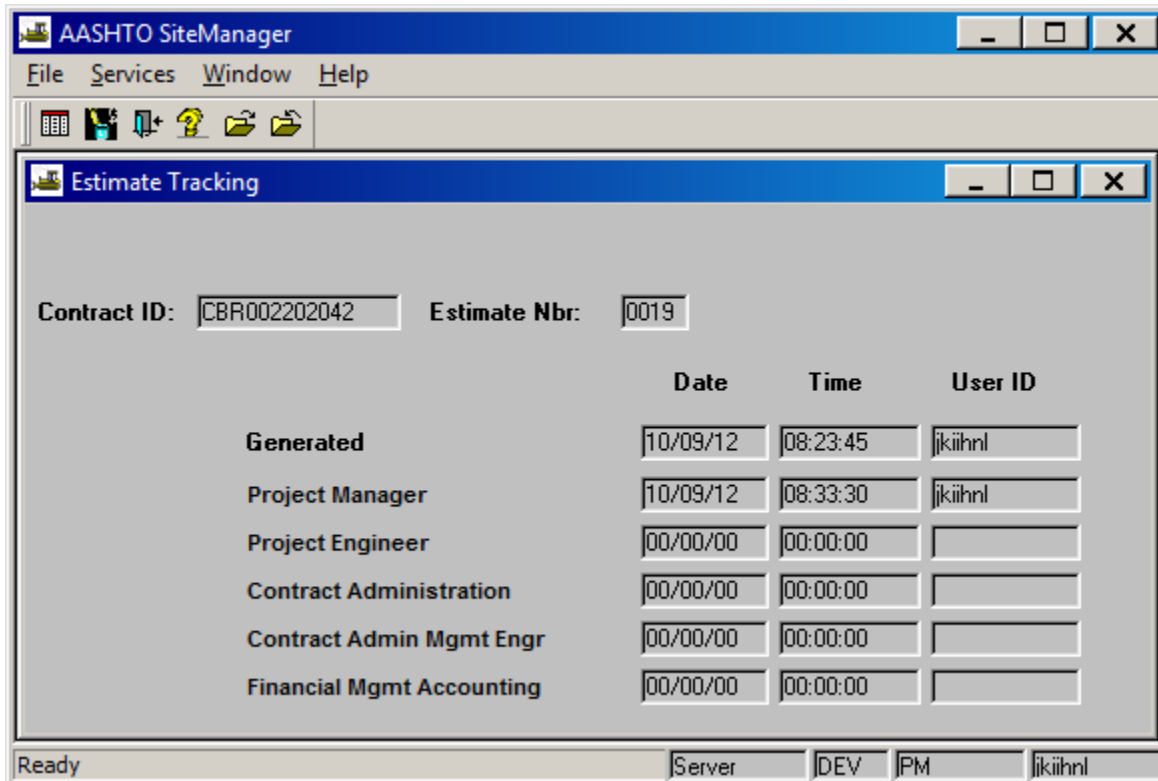


Double-click on the Contract ID or click open  to select a contract.

This allows you to see where the estimate is in the approval process.

****Another estimate cannot be generated for this contract while it is in the approval process****

Exception: If the estimate has only been generated and no approval has taken place –it is still pending. Once it has been approved, it must complete the process or be rejected and deleted for another estimate to be generated.





The screenshot shows the 'Estimate Tracking' window in AASHTO SiteManager. The window title is 'Estimate Tracking'. The main area contains the following information:

Contract ID: Estimate Nbr:

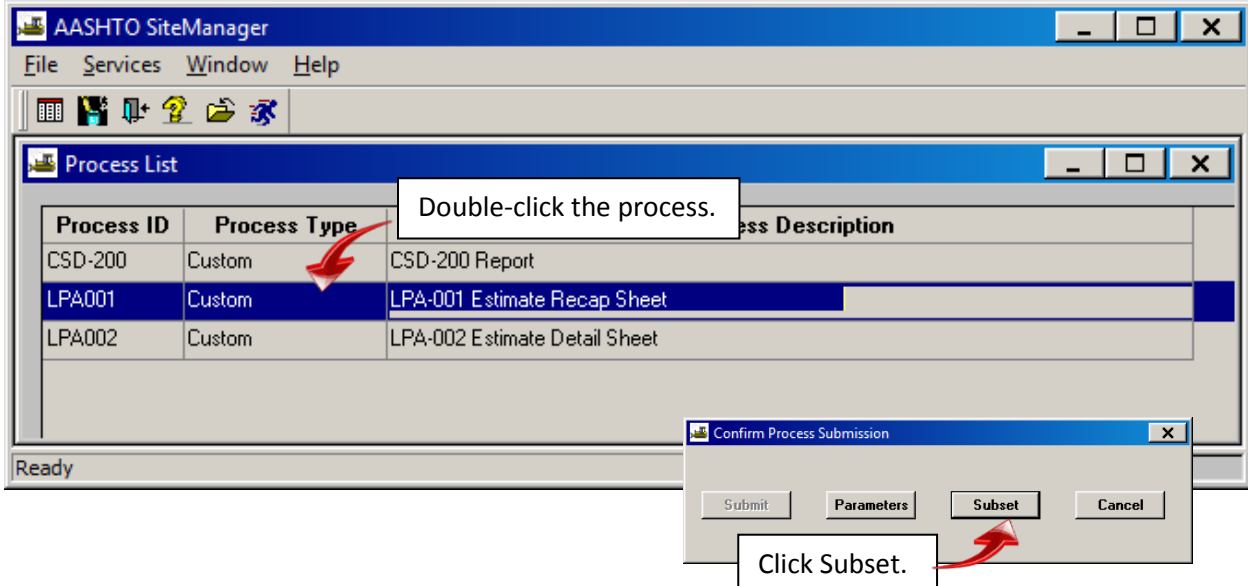
	Date	Time	User ID
Generated	<input type="text" value="10/09/12"/>	<input type="text" value="08:23:45"/>	<input type="text" value="jkiihnl"/>
Project Manager	<input type="text" value="10/09/12"/>	<input type="text" value="08:33:30"/>	<input type="text" value="jkiihnl"/>
Project Engineer	<input type="text" value="00/00/00"/>	<input type="text" value="00:00:00"/>	<input type="text"/>
Contract Administration	<input type="text" value="00/00/00"/>	<input type="text" value="00:00:00"/>	<input type="text"/>
Contract Admin Mgmt Engr	<input type="text" value="00/00/00"/>	<input type="text" value="00:00:00"/>	<input type="text"/>
Financial Mgmt Accounting	<input type="text" value="00/00/00"/>	<input type="text" value="00:00:00"/>	<input type="text"/>

At the bottom of the window, the status bar shows: Ready | Server | DEV | PM | jkiihnl

Process Lists

Navigation: Main panel -> Contractor Payments  Process List 

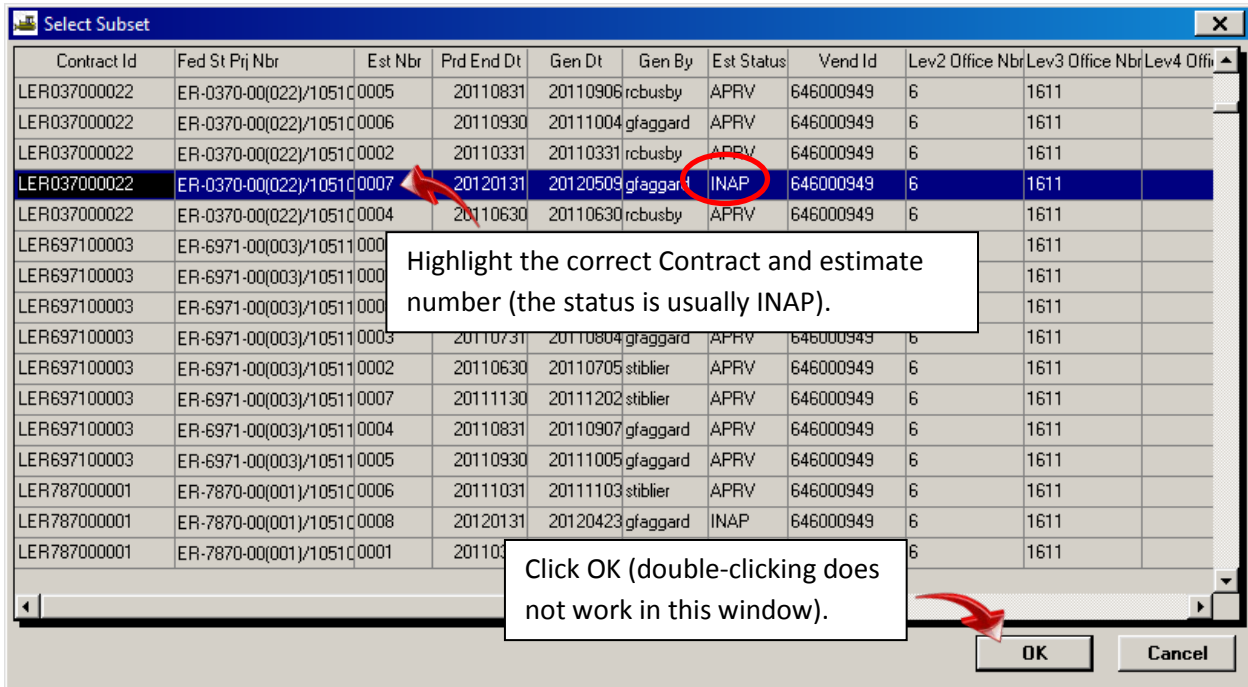
The processes for LPA001 and LPA002 will need to be run to get these reports. The Project Manager and/or the Project Engineer can run these processes.



Double-click the process.

Process ID	Process Type	Process Description
CSD-200	Custom	CSD-200 Report
LPA001	Custom	LPA-001 Estimate Recap Sheet
LPA002	Custom	LPA-002 Estimate Detail Sheet

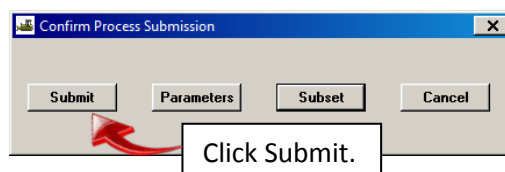
Click Subset.



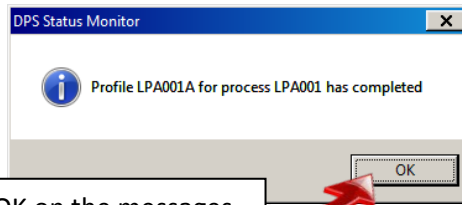
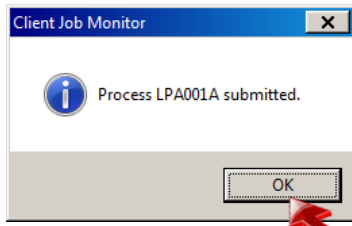
Highlight the correct Contract and estimate number (the status is usually INAP).

Contract Id	Fed St Prj Nbr	Est Nbr	Prd End Dt	Gen Dt	Gen By	Est Status	Vend Id	Lev2 Office Nbr	Lev3 Office Nbr	Lev4 Offi
LER037000022	ER-0370-00(022)/1051C	0005	20110831	20110906	rcbusby	APRV	646000949	6	1611	
LER037000022	ER-0370-00(022)/1051C	0006	20110930	20111004	gflaggard	APRV	646000949	6	1611	
LER037000022	ER-0370-00(022)/1051C	0002	20110331	20110331	rcbusby	APRV	646000949	6	1611	
LER037000022	ER-0370-00(022)/1051C	0007	20120131	20120509	gflaggard	INAP	646000949	6	1611	
LER037000022	ER-0370-00(022)/1051C	0004	20110630	20110630	rcbusby	APRV	646000949	6	1611	
LER697100003	ER-6971-00(003)/10511	0000							1611	
LER697100003	ER-6971-00(003)/10511	0000							1611	
LER697100003	ER-6971-00(003)/10511	0000							1611	
LER697100003	ER-6971-00(003)/10511	0003	20110731	20110804	gflaggard	APRV	646000949	6	1611	
LER697100003	ER-6971-00(003)/10511	0002	20110630	20110705	stblier	APRV	646000949	6	1611	
LER697100003	ER-6971-00(003)/10511	0007	20111130	20111202	stblier	APRV	646000949	6	1611	
LER697100003	ER-6971-00(003)/10511	0004	20110831	20110907	gflaggard	APRV	646000949	6	1611	
LER697100003	ER-6971-00(003)/10511	0005	20110930	20111005	gflaggard	APRV	646000949	6	1611	
LER787000001	ER-7870-00(001)/1051C	0006	20111031	20111103	stblier	APRV	646000949	6	1611	
LER787000001	ER-7870-00(001)/1051C	0008	20120131	20120423	gflaggard	INAP	646000949	6	1611	
LER787000001	ER-7870-00(001)/1051C	0001	201103					6	1611	

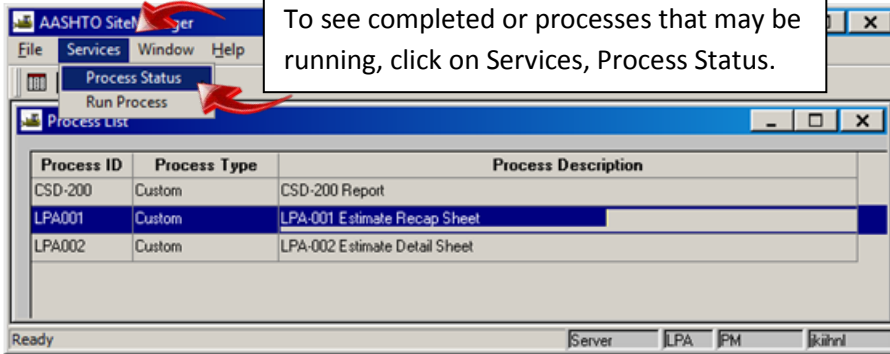
Click OK (double-clicking does not work in this window).



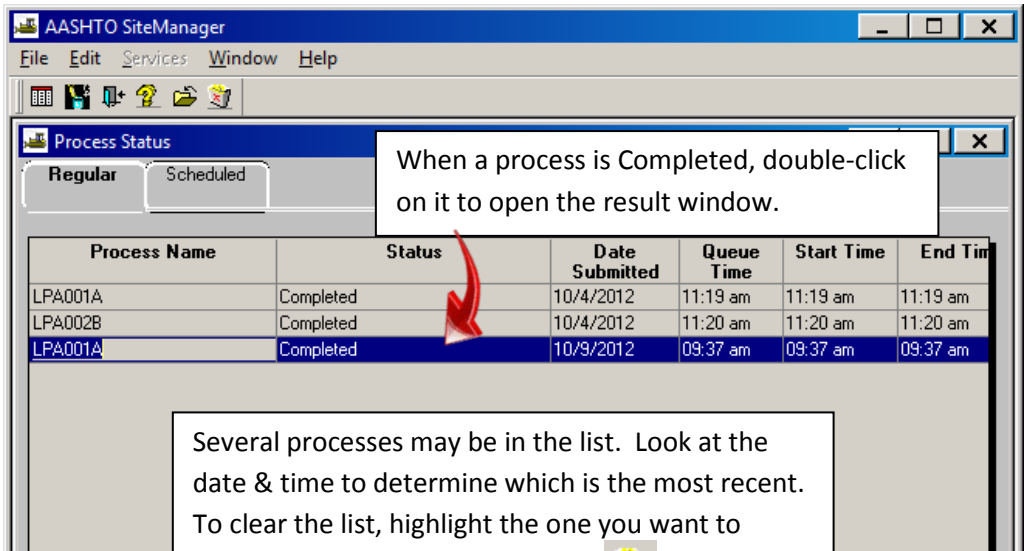
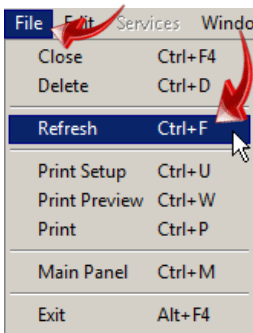
Click Submit.




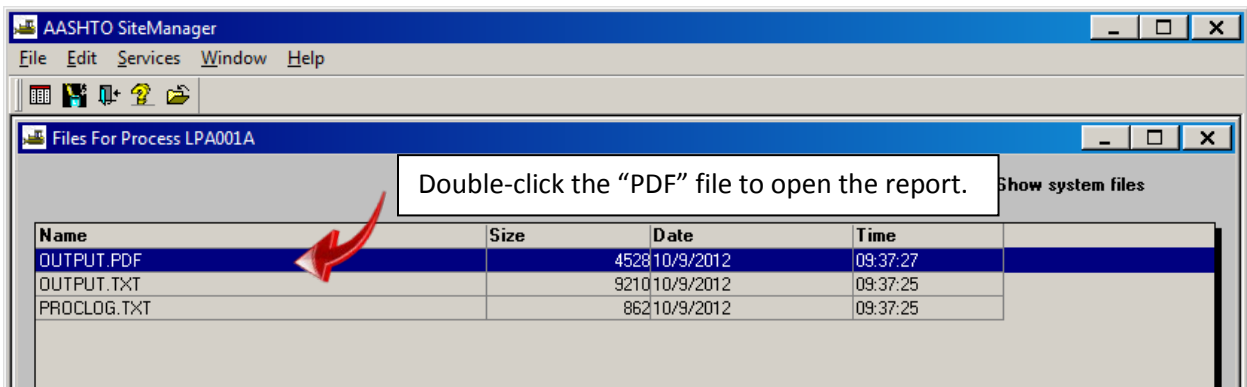
Click OK on the messages.

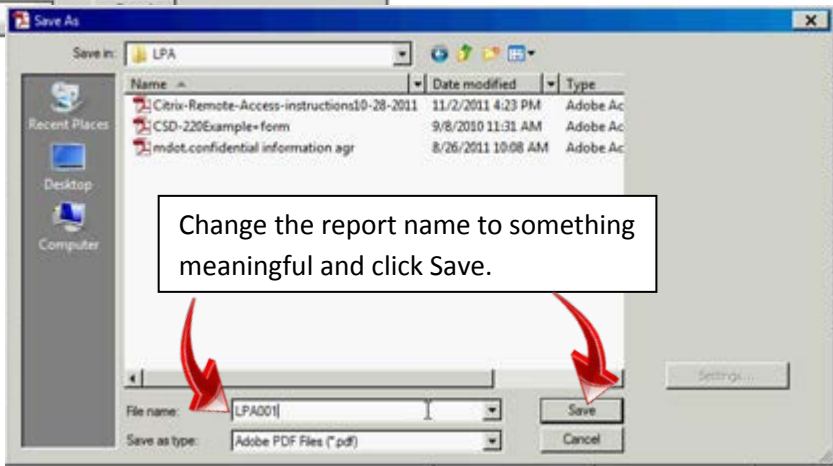
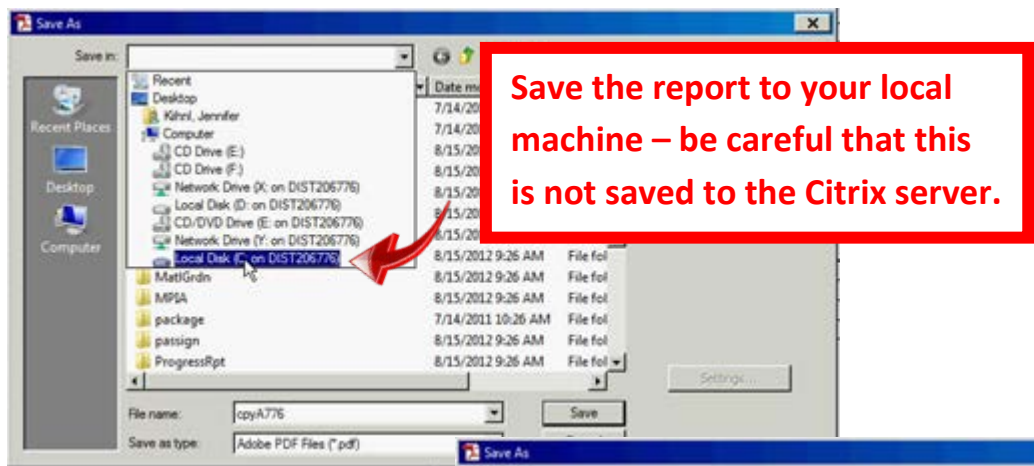
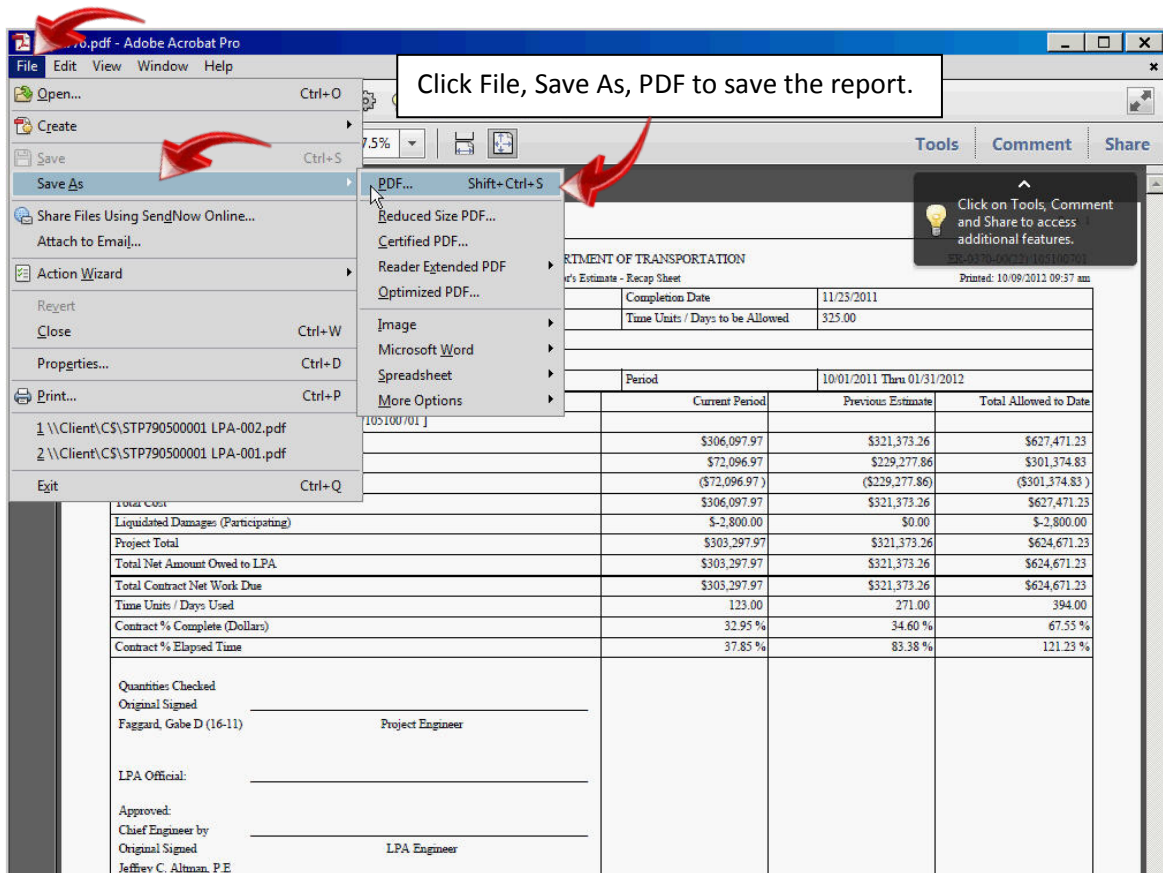


If a process is still running, click File, Refresh to update the list.



Several processes may be in the list. Look at the date & time to determine which is the most recent. To clear the list, highlight the one you want to delete and click the delete button .





After the report is saved to a local machine, open it from that location. Then print the report on a local printer.

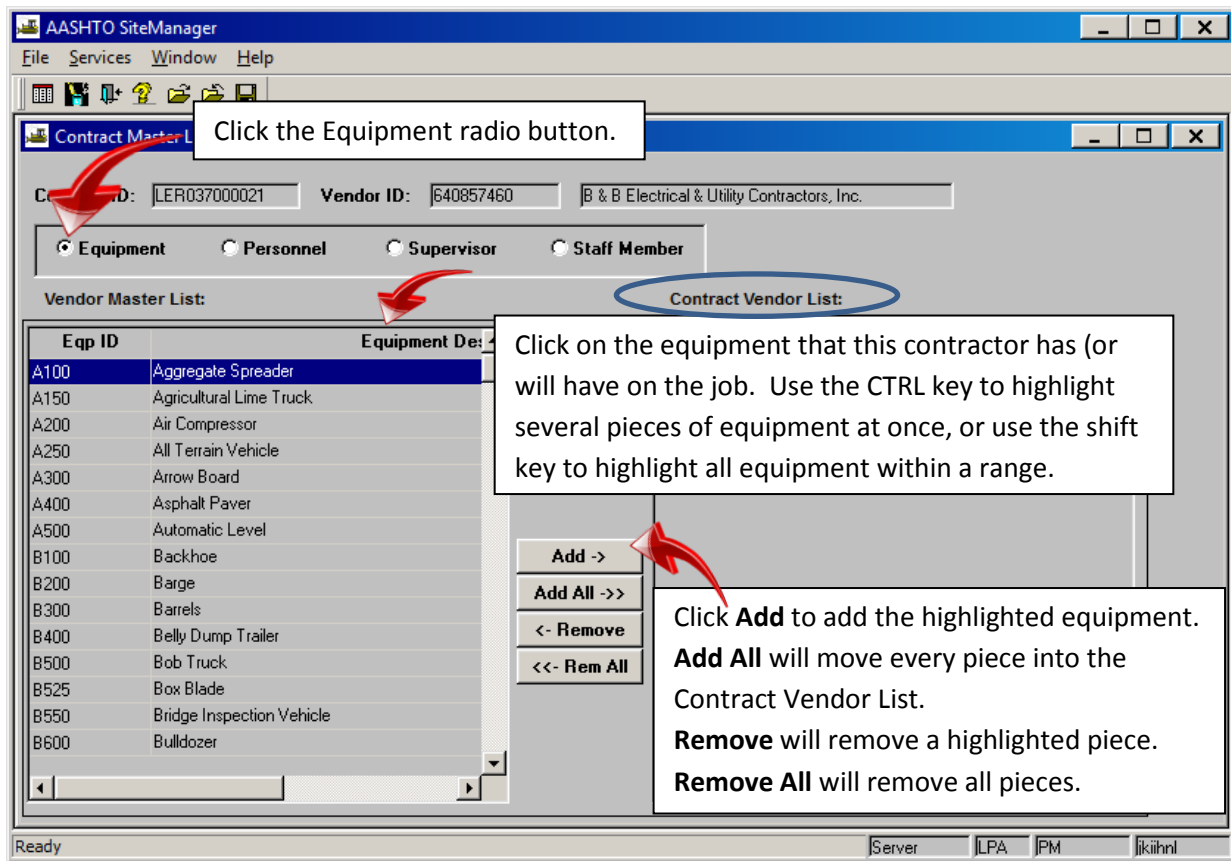
Equipment/Personnel/ Staff Lists

Navigation: Main Panel ->Daily Work Reports  Reference Tables  Contract Master List 

Double-click the contract. Then double-click the contractor.

The **Contract Vendor Lists** define what is in the drop-down lists in the DWR. Equipment and Personnel are **contractor** specific. Staff is defined for the **Contract**.

Equipment



The screenshot shows the 'Contract Master List' window in AASHTO SiteManager. It displays a table of equipment for a specific contractor. Annotations include:

- A red arrow pointing to the 'Equipment' radio button with the text: "Click the Equipment radio button."
- A blue circle around the 'Contract Vendor List' header.
- A text box explaining: "Click on the equipment that this contractor has (or will have on the job). Use the CTRL key to highlight several pieces of equipment at once, or use the shift key to highlight all equipment within a range."
- A red arrow pointing to the 'Add ->' button with a text box: "Click **Add** to add the highlighted equipment. **Add All** will move every piece into the Contract Vendor List. **Remove** will remove a highlighted piece. **Remove All** will remove all pieces."

Eqp ID	Equipment Description
A100	Aggregate Spreader
A150	Agricultural Lime Truck
A200	Air Compressor
A250	All Terrain Vehicle
A300	Arrow Board
A400	Asphalt Paver
A500	Automatic Level
B100	Backhoe
B200	Barge
B300	Barrels
B400	Belly Dump Trailer
B500	Bob Truck
B525	Box Blade
B550	Bridge Inspection Vehicle
B600	Bulldozer

Click save  to save changes.

Personnel

Click the Personnel radio button.

Click on the Personnel type that the contractor has (or will have) on the job. Use the Ctrl key to highlight several pieces of equipment at once, or use the Shift key to highlight all personnel within a range.

Click **Add** to add the highlighted Personnel type.
Add All will move every Personnel type into the Contract Vendor List.
Remove will remove a highlighted Personnel type.
Remove All will remove all Personnel types.

Contract ID: LER037... Vendor ID: 640857460 B & B Electrical & Utility Contractors, Inc.

Equipment Personnel Supervisor Staff Member

Vendor Master List: Personnel Name

Personnel Name
Aggregate Spreader Operator
Air Tool Oper. (Jack Ham./Air Comp.)
Asphalt Broom Oper. (Sweeper)
Asphalt Distributor Operator
Asphalt Field Tech
Asphalt Lab Tech
Asphalt Paving Mach./Spreader Oper.
Asphalt Plant Operator
Asphalt Raker
Backhoe/Shovel Operator
Boat Operator
Brick Mason
Brick Mason Tender
Bulldozer Operator
Carpenter

Contract Vendor List: Personnel Name

Add ->
Add All ->>
<- Remove
<<- Rem All

Ready

Click save  to save changes.

Staff

Staff only needs to be defined once. Even though it appears that it is defined per contractor, it is actually contract-wide and will appear under every contractor after it is defined under one contractor.

Contract ID: LER037000021 Vendor ID: 640857460 B Electrical & Utility Contractors, Inc.

Equipment Personnel Supervisor Staff Member

Vendor Master List:




SSN / SIN	S / C	
1215000017	S	McKee, John W
1215000030	S	Meyer, Robert
1215000031	S	Watson, Thomas
1215000032	S	Brown, Michael
1215000033	S	Newsom, Larry
1215000034	S	Williams, Sanford
1215000035	S	Pittman, James
1215000036	S	Gassion, Edric
1215000037	S	Funderburk, Dave
1215000038	S	Simpson, Timothy Collins
1215000039	S	Moore, Clay
1215000040	S	Sweatt, Jeff
1215000041	S	Tillotson, Zach
1215000042	S	Davis, Jim
1215000043	S	Simmons, Kyle
1215000020	S	Sims, Jr., Edward D.
1215000021	S	Sowell, Ronnie L.
1215000022	S	Terry, David L.
1215000023	S	Terry, Jr., James E.
1215000024	S	White, James H.
1215000025	S	Wilson, Lennon L.
1215000026	S	Worley, Henry P. Jr.
1215000027	S	Wade, Tommy Jr.
1215000028	S	Hemphill, Larry
1215000029	S	Diedrich, Jill

Buttons: Add ->, Add All ->>, <- Remove, <<- Rem All

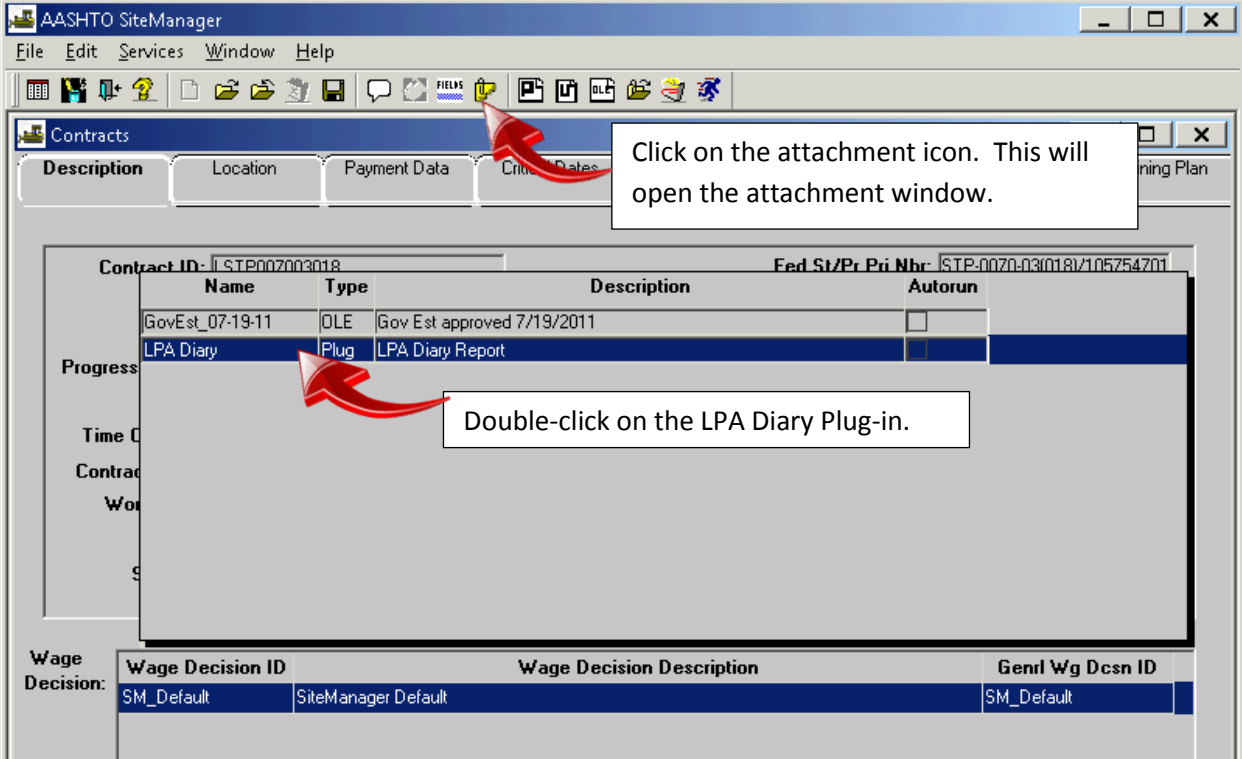
Ready

Click save  to save changes.

Print the Diary

Navigation: Main Panel ->Contract Administration  Contract Records  Contracts 

Double-click on the contract or click open  to select a contract.



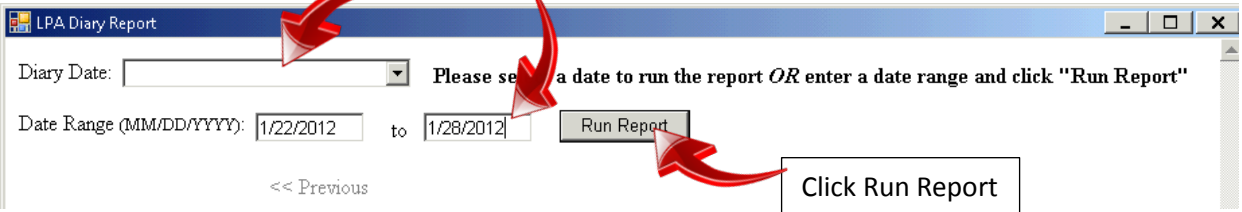
Click on the attachment icon. This will open the attachment window.

Name	Type	Description	Autorun
GovEst_07-19-11	OLE	Gov Est approved 7/19/2011	<input type="checkbox"/>
LPA Diary	Plug	LPA Diary Report	<input type="checkbox"/>

Double-click on the LPA Diary Plug-in.

Wage Decision ID	Wage Decision Description	Genrl Wg Dcsn ID
SM_Default	SiteManager Default	SM_Default

Enter the Diary Date *or* the Date Range for the diary (the largest date range you should use is one month).



Diary Date: Please select a date to run the report *OR* enter a date range and click "Run Report"

Date Range (MM/DD/YYYY): to

<< Previous

LPA Diary Report

Diary Date: Please select a date to run the report OR enter a date range and click "Run Report"

Date Range (MM/DD/YYYY): to

<< Previous Next >>

City of Batesville
Buchart Horn, Inc.

Contract ID: STP-0070-03(018)/105754701 Diary Date: Sunday January 22, 2012

Temperature and Weather Conditions:

High: 70 A.M.: Rain
Low: 36 P.M.: Cloudy

Remarks

1. Contractor Operations	No work on project today.	joberso
3. Soil Conditions	Suitable	joberso
4. Rain/Precipitation	0.48	joberso

Contractor	Nbr of Supervisors	Nbr of Workers	Contractor Hrs Worked
<hr/>			
	Nbr of Persons	Hours Worked	Total Hours
<hr/>			
	Nbr of Pieces	Nbr Used	Hours Used

Project Engineer: _____

The report displays. Make sure you can see the scroll bar for the report.

Hover your mouse in the report area to display the save option.

Save the report to a local drive\folder. Then navigate to that folder and print the report from there.

Save a Copy...

Save in:

Recent

Desktop

My Documents

My Computer

My Network Places

File name:

Save as type: