

KENTUCKY TRANSPORTATION CABINET

Kentucky TRNS*PORT Information Series

SiteManager Module

Contract Activation Plan

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DIVISION OF CONSTRUCTION PROCUREMENT

Most information required for contract activation will automatically be entered into SiteManager during the creation of the contract by the Division of Construction Procurement. However, due to some local variables the District Office and Resident Engineer's office must enter some specific data prior to daily records being entered.

Navigation

Main Panel\System Administration\Process List

Procedure

The Division of Construction Procurement, upon award of a Contract will load the Contract from LAS into SiteManager.

Once the Contract is loading into SiteManager, Construction Procurement will export the SiteXchange Vendor file and the SiteXchange Contract file, and distribute the files to the Prime Contractor. The Prime Contractor will enter the DBE Detailed plan in SiteXchange and return the files to Construction Procurement.

Construction Procurement will load the SiteXchange files received from the Contractor into SiteManager.

Navigation

Main Panel\Contract Administration\Reference Tables\Vendors\Associates

Procedure

Construction Procurement should indicate the Insurance Company and the Surety Company on the Associates folder in the Vendor window.

Navigation

Main Panel\Contract Administration\Contract Records\Contracts\Critical Dates

Procedure

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When all the contract paperwork is complete and signed by the Prime Contractor, Construction Procurement will enter the Execution Date on the Critical Dates folder tab.

Navigation

Main Panel\Contract Administration\Contract Records\Key Dates

Procedure

Construction Procurement will enter the Work Order Issue Date in the Key Dates window. The District responsible for the contract will be notified in the SiteManager inbox and will begin the contract activation process.

Navigation

Main Panel\Contract Administration\Contract Records\Projects

Procedure

Construction Procurement will add the Document Number.

Navigation

Main Panel\Contract Administration\Contract Records\Contracts\Prime Contractor

Procedure

On the Prime Contractor folder tab, click the ADDRESS button on the toolbar and click the address of the Prime Contractor as indicated on the Contract. Click the Services Menu and select the SELECT ADDRESS choice. Select MARS Address for Contractor.

Place the cursor in the PRIME ASSOCIATES field and click the NEW button. Place the cursor on the ASSOC VENDOR ID field of the Prime Associates section until a magnifying glass appears. Right click and select Search from the menu. Highlight the appropriate Insurance Company and right click on it. Click the SAVE button in the toolbar to save changes. Repeat this process and select the appropriate Surety Company. If the Surety or Insurance Company is not available, contact the SiteManager Central Office Help Desk.

Construction Procurement will enter MARS Data from TC10 authorization.

The Division of Accounts will be notified to review the TC10 information.

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DISTRICT OFFICE

The District Office, upon notification from the Division of Construction Procurement of the availability of a new contract in SiteManager, must perform the following steps prior to activating the contract and releasing it to the Resident Engineer.

Navigation

Main Panel\Contract Administration\Contract Records\Contracts\Description

General Description

Position the cursor in the Contract ID field. Click the OPEN Button on the toolbar and double click on the desired project.

Select the 3-digit Crew Number from the dropdown list in the Crew field. Click the SAVE button in the toolbar to save changes.

Select the Wage Decision to enter in the Wage Decision field. Position the cursor in the Wage Decision field, and Click the NEW Button on the toolbar. Perform a search in the Wage Decision field, select the appropriate Wage Decision and click the OK button.

Navigation

Main Panel\Contract Administration\Contract Records\Contracts\Location

Procedure

Click on CONTRACT COUNTY field. All counties for the project should be shown (Multi-County contracts should show every county in the contract.). If all counties for the project are not shown, click the NEW button on the toolbar. Place the cursor in the blank CONTRACT COUNTY field until a magnifying glass appears. Right click and select SEARCH from the menu. Highlight the desired county from the list and right click to select it. Click the SAVE button in the toolbar to save changes.

Make sure the PRIMARY COUNTY has a check mark designating it as such. Click the SAVE button in the toolbar to save any changes. Only one PRIMARY COUNTY is allowed per contract, so if multiple counties are shown, it should be the county having the largest dollar value of the work.

Navigation

Main Panel\Contract Administration\Contract Records\Contracts\Primary Personnel

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Procedure

Place the cursor on the PROJECT MANAGER field until a magnifying glass appears. Right click and select Search from the menu. Highlight the name of the assigned crew's office person and right click on it. Click the SAVE button in the toolbar to save changes.

Place the cursor on the RESIDENT ENGINEER field until a magnifying glass appears. Right click and select Search from the menu. Highlight the name of the assigned crew's Resident Engineer and right click on it. Click the SAVE button in the toolbar to save changes.

Place the cursor on the DISTRIBUTION LIST field of the Contract Status Changed to Active section until a magnifying glass appears. Right click and select Search from the menu. Highlight the appropriate DISTRIBUTION LIST and right click on it. Click the SAVE button in the toolbar to save changes.

Navigation

Main Panel\Contract Administration\Contract Records\Contracts\Prime Contractor

Procedure

On the Prime Contractor folder tab, click the ADDRESS button on the toolbar and click the address of the Prime Contractor as indicated on the Contract. Click the Services Menu and select the SELECT ADDRESS choice. Select MARS Address for Contractor.

Place the cursor in the PRIME ASSOCIATES field and click the NEW button. Place the cursor on the ASSOC VENDOR ID field of the Prime Associates section until a magnifying glass appears. Right click and select Search from the menu. Highlight the appropriate Insurance Company and right click on it. Click the SAVE button in the toolbar to save changes. Repeat this process and select the appropriate Surety Company. If the Surety or Insurance Company is not available, contact the SiteManager Central Office Help Desk.

Navigation

Main Panel\Contract Administration\Process List

Procedure

Highlight the MAJOR ITEM process. Click on the "Running Man" icon in the toolbar.

When the process is complete, click on File and then click on Print to generate the Major Item report.

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Navigation

Main Panel\Contract Administration\Contract Records\Items

Procedure

Using the MAJOR ITEM PROCESS LIST generated in the previous step, click the MAJOR ITEM box on each item shown on list so that a check mark appears. Click the SAVE button in toolbar to save changes.

Navigation

Main Panel\Contract Administration\Contract Records\Contracts\Description

Procedure

In the STATUS BOX, open the pull down menu, highlight “ACTIVE,” and click the Critical Dates folder tab key.

*****DO NOT CLICK ON THE SAVE BUTTON*****

Navigation

Main Panel\Contract Administration\Contract Records\Contracts\Critical Dates

Procedure

NOTICE: PERFORMING THE NEXT STEP WILL ACTIVATE THE CONTRACT AND CAUSE CONTRACT TIME TO START BEING CHARGED.

Enter the Work Order Issued Date in the NOTICE TO PROCEED date field. Click the SAVE button in toolbar to save changes. Those individuals in the Active Distribution List have now been notified the contract is active. The Work Order Issued date can be found on the Key Dates window.

Navigation

Main Panel\Contract Administration\Contract Records\Contracts\Key Dates

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Procedure

Verify the KEY DATES for the contract. Modify as necessary. Dates not pertaining to the Contract should be deleted. Modification of Key Dates may take place before or after the contract is activated.

Navigation

Main Panel\Contract Administration\Contract Records\Checklist Scheduled Events

Procedure

Verify the CHECKLIST SCHEDULED EVENTS for the contract. Modify as necessary and establish number of occurrences for each date. Dates not pertaining to the Contract should be deleted. Modification of Checklist Scheduled Events may take place before or after the contract is activated.

Navigation

Main Panel\Contractor Payments\Reference Tables\Contractor Payment Approval Levels

Procedure

If the contract will be administered by the District Office (i.e., Maintenance Contracts), the District should modify the contractor approval levels for Progress Estimates so that the District Office is the first level of approval. For contracts that will be administered by the Resident Offices, no change to the Contractor Payment Approval Levels will be needed. If the District Office will administer the Contract, then the District Office should complete the Resident Engineer's Office contract activation duties, as stated below.

After the District Office (DCOM group) activates the contract, they would notify the Resident Engineer's Office, DME, and the CO Materials Project Certification Technician indicating that the contract has been activated.

RESIDENT ENGINEER'S OFFICE

The Resident Engineer's Office, upon notification from the District Office of the availability of a new contract in SiteManager, must perform the following steps prior entering contract field data.

Navigation

Main Panel\Daily Work Report\Reference Tables\Contract Master List

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Procedure

Double click on VENDORS to show contracts. Highlight the desired contract and click the OK button.

Click on each bullet button (Equipment, Personnel, etc.) and click ADD ALL for each, so that everything in the left column appears in the right column.

Click the SAVE button in the toolbar to save changes.

Navigation

Main Panel\Contract Administration\Contract Records\Contract Authority

Procedure

Assign contract access as needed.

Navigation

Main Panel\Contract Administration\Contract Records\Contracts\Primary Personnel

Procedure

Change PROJECT MANAGER if desired.

DISTRICT MATERIALS ENGINEER

The DME, upon notification from the District Office of the availability of a new contract in SiteManager, must perform the following steps prior entering contract field data.

Navigation

Main Panel\Materials Management\Contract Materials\Contract Materials

Procedure

Print the Outstanding Item List from the Services menu.

The report indicates Items that do NOT have sampling and testing requirements associated to it.

The DME is responsible for generating the Outstanding Item List report and reviewing it for any item that should have material sampling and testing requirements defined for it.

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For any item identified during the review, the DME will contact the Materials Administrator to have them set up at the global level.

Once all outstanding item issues have been resolved, the DME will generate Contract Materials.

Navigation

Main Panel\Materials Management\Contract Materials\Contract Sampling and Testing

Procedure

The DME would make all contract specific modifications to the sampling and testing requirements.

The DME would notify the Resident Office indicating that the Contract Sampling and Testing requirements have been set up.