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1. Welcome

1.1 Introduction

Idaho Transportation Department (ITD) implemented the new AASHTOWare Project software. It is a web-based contract management system. This new software provides the ability for ITD internal and external users to access the application without using a Virtual Private Network (VPN).

This guide is intended for ITD Contractors. The new system gives the ability to all ITD Contractors to electronically review/approve Change Orders and Payment Estimates. This user’s guide also provides information about using construction functionalities in the web-based AASHTOWare Project software and illustrates instructions on setting up the browser and familiarizing with the application user interface.
2. Getting Started

2.1 Overview of Getting Started

The Getting Started section describes how to use the features in the web-based AASHTOWare Project™ to complete basic tasks. Carefully review these topics to make your first experiences with the software easier and more intuitive.

*Getting Started* includes these topics:

- How to Navigate CMUG in PDF
- ITD Network Account Setup
- Setting up Your Browser
- Logging On
- Logging Off
- Familiarize Yourself with User Interface
- Using Actions Menu
- Icons
2.2 How to Navigate CMUG in PDF

Due to AASHTOWare Construction Management User Guide (CMUG) big file size, navigating the document can be a bit challenge. There are some functions the user can utilize in the PDF application to efficiently navigate CMUG without wasting their valuable time.

**Note:** PDF features mentioned below will only work in the Adobe Acrobat Reader desktop application. To use these feature please download the CMUG on the computer and open with compatible Adobe application.

### 2.2.1 Enable the Table of Contents

In Adobe, one way the user can interact with the document is by enabling the table of contents which gives the user the ability to have more control of the document. This eliminates the infinite scrolling to find the right page with right information. To enable table of contents, follow these instructions:

[Click to expand panel]

AASHTOWare Project
Click Bookmark Icon

Now the whole document can be navigated through this bookmark panel. The user can easily jump from one chapter to another by clicking on the section name.

AASHTOWare Project
Construction

Idaho Transportation Department
2.2.2 Page Navigation Shortcuts

PDF has a page navigation feature where it remembers user’s last known location in the document and can take them back by performing certain shortcuts. To view these shortcuts, see the figure below.

To view the previous location in the document, perform Alt + Left Arrow

To view the next location in the document, perform Alt + Right Arrow

To find a specific page in the document, perform Shift + Ctrl + N
2.3 ITD Network Account Setup

In order to access web-based AASHTOWare Project, the external user must have an ITD network account established.

If an external user does not have an existing ITD Network account and/or AASHTOWare access, then follow-up with an ITD Sponsor identified in the list below. The ITD Sponsor listed below will then initiate the request process for the end user. For further details, please adhere to the guidelines outlined in the AASHTOWare Access Request Process document.

_note_: An ITD Sponsor is an ITD Employee, who is responsible for monitoring the use of the system and verifying that the agreements between ITD and a third party are current.

Refer to the table below to contact the appropriate ITD Sponsor who can assist the external user with their ITD Network Account and AASHTOWare System Account:

<table>
<thead>
<tr>
<th>District #</th>
<th>ITD Sponsor Name</th>
<th>Email</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GiAnne Householter-Williams</td>
<td><a href="mailto:GiAnne.HouseholterWilliams@itd.idaho.gov">GiAnne.HouseholterWilliams@itd.idaho.gov</a></td>
<td>(208) 265-4312</td>
</tr>
<tr>
<td></td>
<td>Chance Cole</td>
<td><a href="mailto:Chance.Cole@itd.idaho.gov">Chance.Cole@itd.idaho.gov</a></td>
<td>(208) 772-8021</td>
</tr>
<tr>
<td>2</td>
<td>Riley Bender</td>
<td><a href="mailto:Riley.Bender@itd.idaho.gov">Riley.Bender@itd.idaho.gov</a></td>
<td>(208) 799-4225</td>
</tr>
<tr>
<td></td>
<td>Robert Gordon</td>
<td><a href="mailto:Robert.Gordon@itd.idaho.gov">Robert.Gordon@itd.idaho.gov</a></td>
<td>(208) 799-4236</td>
</tr>
<tr>
<td>3</td>
<td>Cheri Mansayon</td>
<td><a href="mailto:Cheri.Mansayon@itd.idaho.gov">Cheri.Mansayon@itd.idaho.gov</a></td>
<td>(208) 459-7429</td>
</tr>
<tr>
<td></td>
<td>Mike Anderson</td>
<td><a href="mailto:Mike.Anderson@itd.idaho.gov">Mike.Anderson@itd.idaho.gov</a></td>
<td>(208) 334-8923</td>
</tr>
<tr>
<td></td>
<td>Michael Lucas</td>
<td><a href="mailto:Michael.Lucas@itd.idaho.gov">Michael.Lucas@itd.idaho.gov</a></td>
<td>(208) 334-8377</td>
</tr>
<tr>
<td></td>
<td>Alex Deduck</td>
<td><a href="mailto:Alex.Deduck@itd.idaho.gov">Alex.Deduck@itd.idaho.gov</a></td>
<td>(208) 334-8343</td>
</tr>
<tr>
<td>4</td>
<td>Sam Purser</td>
<td><a href="mailto:Sam.Purser@itd.idaho.gov">Sam.Purser@itd.idaho.gov</a></td>
<td>(208) 886-7812</td>
</tr>
<tr>
<td></td>
<td>Seth Helms</td>
<td><a href="mailto:Seth.Helms@itd.idaho.gov">Seth.Helms@itd.idaho.gov</a></td>
<td>(208) 886-7816</td>
</tr>
<tr>
<td></td>
<td>Travis Hitchcock</td>
<td><a href="mailto:Travis.Hitchcock@itd.idaho.gov">Travis.Hitchcock@itd.idaho.gov</a></td>
<td>(208) 544-7915</td>
</tr>
<tr>
<td>5</td>
<td>Chip Becker</td>
<td><a href="mailto:Chip.Becker@itd.idaho.gov">Chip.Becker@itd.idaho.gov</a></td>
<td>(208) 239-3387</td>
</tr>
<tr>
<td></td>
<td>Sandy Jenkins</td>
<td><a href="mailto:Sandy.Jenkins@itd.idaho.gov">Sandy.Jenkins@itd.idaho.gov</a></td>
<td>(208) 239-3361</td>
</tr>
<tr>
<td></td>
<td>Steve Davis</td>
<td><a href="mailto:Steve.Davis@itd.idaho.gov">Steve.Davis@itd.idaho.gov</a></td>
<td>(208) 239-3350</td>
</tr>
<tr>
<td></td>
<td>Zakary Johnson</td>
<td><a href="mailto:Zak.Johnson@itd.idaho.gov">Zak.Johnson@itd.idaho.gov</a></td>
<td>(208) 239-3363</td>
</tr>
<tr>
<td>6</td>
<td>Curtis Calderwood</td>
<td><a href="mailto:Curtis.Calderwood@itd.idaho.gov">Curtis.Calderwood@itd.idaho.gov</a></td>
<td>(208) 745-5637</td>
</tr>
<tr>
<td></td>
<td>Gregg Bowman</td>
<td><a href="mailto:Gregg.Bowman@itd.idaho.gov">Gregg.Bowman@itd.idaho.gov</a></td>
<td>(208) 745-5321</td>
</tr>
<tr>
<td></td>
<td>John Cleveland</td>
<td><a href="mailto:John.Cleveland@itd.idaho.gov">John.Cleveland@itd.idaho.gov</a></td>
<td>(208) 745-5645</td>
</tr>
<tr>
<td></td>
<td>Craig Wielenga</td>
<td><a href="mailto:Craig.Wielenga@itd.idaho.gov">Craig.Wielenga@itd.idaho.gov</a></td>
<td>(208) 334-4415</td>
</tr>
<tr>
<td></td>
<td>Jason Henscheid</td>
<td><a href="mailto:Jason.Henscheid@itd.idaho.gov">Jason.Henscheid@itd.idaho.gov</a></td>
<td>(208) 334-8435</td>
</tr>
<tr>
<td></td>
<td>Mike Cram</td>
<td><a href="mailto:Mike.Cram@itd.idaho.gov">Mike.Cram@itd.idaho.gov</a></td>
<td>(208) 334-8518</td>
</tr>
<tr>
<td></td>
<td>Crystal Grasmick</td>
<td><a href="mailto:Crystal.Grasmick@itd.idaho.gov">Crystal.Grasmick@itd.idaho.gov</a></td>
<td>(208) 334-8472</td>
</tr>
</tbody>
</table>
2.4 Setting Up Your Browser

The web-based AASHTOWare Project is designed to run on Google Chrome, Internet Explorer version 11 or higher, and Microsoft Edge. No additional settings are required for Google Chrome and Microsoft Edge. However, if you are using Internet Explorer 11, then correct browser settings are required to make sure the application performs as it should.

2.4.1 Internet Explorer 11 Browser Settings

1. Start Internet Explorer version 11 or higher.
2. Click the **Tools** option from the menu bar.
3. Click on **Compatibility View Settings**.
4. *Uncheck* **Display intranet sites in Compatibility View** check box.
5. Click the **Close** button.
6. Click the **Tools** option from the menu bar.
7. Click the **Internet Options**.
8. In **General** tab, under **Browser History**, click the **Settings** button.
9. For the **Check for newer versions of stored pages** setting, click **Every time I visit the webpage** option.
10. Click the **OK** button.
2.5 Logging On

Once an ITD network account has been established and the system administrator has linked ITD network account to the system, the user should be able to log in to the system. To log on to the AASHTOWare Project, follow these steps:

1. Open the web browser of your choice.
2. Click here or type to access the application: https://itdcas.itd.idaho.gov
3. Enter your ITD username in the Username field.
4. Enter your ITD password in the Password field. *(Enter the most updated password.)*
5. Select ITD Users from the dropdown menu for the Domain. *(This will be the default option.)*
6. Click the Log On button.

💡 Tip: Remember to bookmark AASHTOWare Project application page in the browser, so it is easier to access the website on the next visit.

Note: If you are unable to log on to the AASHTOWare Project, please contact your ITD sponsor for access.

Figure 1 - AASHTOWare Project Log On Screen

Note: Unable to access AASHTOWare Project system can have several reasons. Always touch base with an ITD Sponsor, if any issue is encountered.

2.6 Logging Off

To Log Off, simply click the Log Off button on the top right corner of the screen. When the user logs off, the system ends session and takes them back to the logon page.
2.7 Familiarize Yourself with User Interface

Once logged on to the AASHTOWare Project, it will take the user to the homepage. From here the user can navigate to the different construction functions.

![User Interface Diagram]

**Figure 3 - AASHTOWare Project Dashboard**

### 2.7.1 Menu Bar

- **Home Button**: Clicking the Home button from any page in the system brings the user back to this screen, the home screen.
- **Previous Button**: Clicking this button returns the user to the last page they visited in the system.
- **My Pages**: Clicking this button takes the user to the My Page Overview component, where they can manage their frequently used (or favorite) pages.
- **Global Actions Menu**: Click [here](#) for information regarding this function.
- **General Help**: Clicking this button will open an additional tab in the browser and takes the user to the system online help page.
- **Log Off**: Click this button to log off.

### 2.7.2 Construction Component

This component lists all the construction functions the user has access to, based on their active role in the system. Clicking the ? icon on the component takes the user to the online help page for that component only.
2.8 Using Actions Menus

Actions menus allow the user to choose a function or process to perform. Actions menus are located throughout the application and are accessed by clicking an Action icon. There are four types of Actions menus, each of which performs actions on a different level of data. All application pages contain at least one type of Actions menu, many contain two or three, and some contain all four types. These are the four types of Action Menus:

- **Global Actions Menu** – Clicking this button allows the user to generate reports, view/add global attachments, view/add global links, view user settings, view system process history, view tracked issues, and view user outbox.

  **Note:** Global Action menu functions pertain to the whole system not just a particular contract

- **Component Actions Menu** – Clicking this button lets the user perform contract specific functions.

- **Row Actions Menu** – Clicking this button allows the user to perform functions related to individual data on a row.

- **List Actions Menu** – Clicking this button allows the user to perform functions specific to a list below a data row.

**Important:**

The user must gain an understanding of the Actions menu as these will be used frequently throughout the application to perform basic construction tasks.
## 2.9 Icons

Icons are small images throughout the system that either convey information or can be clicked to perform an action. This table shows some of the common icons used in the system:

<table>
<thead>
<tr>
<th>Icons</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Eraser Icon" /></td>
<td>The eraser icon appears in Quick Find search boxes after criteria is entered. The user can click the icon to reset the search criteria.</td>
</tr>
<tr>
<td><img src="image" alt="Magnifying Glass Icon" /></td>
<td>This magnifying glass icon at the left side of a field indicates an auto-complete field. Auto-complete fields display a filtered list of field values based on the first few characters the user types. The user can press <strong>Enter</strong> to show all values.</td>
</tr>
<tr>
<td><img src="image" alt="Magnifying Glass Icon" /></td>
<td>This magnifying glass is sometimes displayed on the right side of a text box. Clicking this button opens a text dialog panel that allows the user to view and edit the text in a larger area.</td>
</tr>
<tr>
<td><img src="image" alt="Asterisk Icon" /></td>
<td>A red asterisk indicates a field where data entry is required.</td>
</tr>
<tr>
<td><img src="image" alt="Actions Icon" /></td>
<td>The actions icon appears on Actions buttons that the user can click to display an Actions menu. Actions menus provide access to commands and functions the user can perform on data.</td>
</tr>
<tr>
<td><img src="image" alt="Red X Icon" /></td>
<td>The red X icon appears on Delete buttons that the user can click to remove newly added rows that have not been saved. Clicking a Delete button removes the row immediately.</td>
</tr>
<tr>
<td><img src="image" alt="Trash Can Icon" /></td>
<td>The trash can icon appears on the Mark for Deletion button that the user can click to remove saved rows. When the user click the Mark for Deletion button, the button changes to an Undo button. The row is removed only when the user save the changes.</td>
</tr>
<tr>
<td><img src="image" alt="Undo Icon" /></td>
<td>The undo icon appears on Undo buttons that the user can click to reverse an action, such as deleting a saved row.</td>
</tr>
<tr>
<td><img src="image" alt="Help Icon" /></td>
<td>The help icon appears on Help buttons that the user can click to display the online Help system.</td>
</tr>
<tr>
<td><img src="image" alt="Calendar Icon" /></td>
<td>The calendar icon is displayed on the right side of a date field. The user can click the calendar icon to display a calendar where the user can pick a date as the field value.</td>
</tr>
</tbody>
</table>
3. Change Orders

3.1 Overview of Change Orders

ITD has leveraged the new system functionalities to advance the change order process to paperless. The actual change order process has not changed but what has changed is the approval, which will be now be obtained electronically. This guide outlines a comprehensive change order review and approval process for all contractors.

*Change Orders* includes these topics:

- Review Change Order Report
- View Change Order Attachments
- Approve/Reject Change Order
3.2 Review Contractor Change Order Report

When a change order has been drafted and submitted for approval by the ITD Project Coordinator or the Resident Engineer, the user (contractor) will receive an email notifying them to review and approve the change order. Upon receiving email notification, the user can log in to the system to review the change order.

To review the change order report in the system, follow these steps:

1. On the AASHTOWare Project homepage, under the Construction component, click the Change Order hyperlink.

2. On the Change Order Overview page, locate a change order with one of the following methods:
   a. Enter the contract number in the Quick Find search box.
   b. Press the Enter key in the Quick Find search box.
   c. Click Show first 10 hyperlink to view first 10 results.

Note: The contractor will only be able to view those contract change orders that they have access to in the system. If they do not see anything, then please reach out to the residency Project Coordinator or the Resident Engineer.
Note: Your approval will only be required on those change orders where the status will be ‘Pending Approval’.

3. On the Change Order Overview page, select and open the change order that requires your approval by clicking on the CO Num hyperlink. (Make sure to review the correct change order that has status of ‘Pending Approval’.)

4. To review the changes proposed by ITD on the change order, select Contractor Change Order Report from the component Actions menu.
5. To generate the report and view online as PDF, then select Generate as PDF option as the Output Type. *(This will be selected by default.)*

6. To download the report as PDF, then select Download PDF option as the Output Type.

7. Always choose ‘Custom’ as the Report Layout Source. *(This will be selected by default. Don’t change this option.)*

8. Click the Execute button to generate the report.

**CONTRACTOR CHANGE ORDER REPORT EXAMPLE**
This is the section where the actual change order is documented. Review this section carefully as it states the work that the Contractor is required to perform.

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Item ID</th>
<th>Project Line</th>
<th>Project</th>
<th>Category</th>
<th>Item Source</th>
<th>Quantity/Unit</th>
<th>Unit Price</th>
<th>Dollar Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR386Y STL SIGN POST TY E</td>
<td>616-050A</td>
<td>0120</td>
<td>0120 18892</td>
<td>001</td>
<td>Original</td>
<td>95,000 LB</td>
<td>$5.25</td>
<td>$489.75</td>
</tr>
<tr>
<td>Explanation:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FLAGGER CONTROL</td>
<td>626-120A</td>
<td>0170</td>
<td>0170 18892</td>
<td>0001</td>
<td>Original</td>
<td>18.00 HR</td>
<td>$35.00</td>
<td>$630.00</td>
</tr>
<tr>
<td>Explanation:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LONGITUDINAL PAVEMENT MARKING - WATERBORNE</td>
<td>630-025A</td>
<td>0172</td>
<td>0185 18892</td>
<td>0001</td>
<td>Original</td>
<td>194.00 FT</td>
<td>$0.11</td>
<td>$21.34</td>
</tr>
<tr>
<td>Explanation:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OBSTRUCTION OF PAV MARKINGS</td>
<td>203-120A</td>
<td>0015</td>
<td>0015 18892</td>
<td>0001</td>
<td>Original</td>
<td>630.00 FT</td>
<td>$1.05</td>
<td>$661.50</td>
</tr>
<tr>
<td>Explanation:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAVEMENT MARKINGS-PREFORMED THERMOPLASTIC</td>
<td>630-020B</td>
<td>0180</td>
<td>0180 18892</td>
<td>0001</td>
<td>Original</td>
<td>42,000 SF</td>
<td>$0.10</td>
<td>$320.00</td>
</tr>
<tr>
<td>Explanation:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIGN BRACKETS &amp; BRACE ANGLES</td>
<td>616-005A</td>
<td>0115</td>
<td>0115 18892</td>
<td>0001</td>
<td>Original</td>
<td>630.00 LB</td>
<td>$0.30</td>
<td>$193.72</td>
</tr>
<tr>
<td>Explanation:</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>SIGNS TY B</td>
<td>616-010A</td>
<td>0110</td>
<td>0110 18892</td>
<td>0001</td>
<td>Original</td>
<td>12,000 SF</td>
<td>$20.50</td>
<td>$246.00</td>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
On the last page of the report, the Approvals section will be visible. In this section, you can view the approval groups on this change order. Once you approve the change order, the date/time stamp will be populated under the Date/Time Approved field along with Approval Decision, Name, and Title.
3.3 View Change Order Attachments

After reviewing the Contractor Change Order report, the user can also view any supporting documents that are attached to this change order to better enhance their understanding on what work they will be performing on this change order. The change order attachments might include the following: plan sheets, specifications or standard drawings.

To view change order attachments, follow these steps:

1. On the Generate Report page, click the Previous button on the menu bar.
2. On the *Contract Change Order Summary* page, select **Attachments** from the component **Actions** menu.

3. If there is a document attached to the change order, then click on the **Name** hyperlink to download and view the attachment.
3.4 Approve/Reject Change Order

After reviewing the Contractor Change Order report and attachments, the user can approve/reject the change order.

To approve/reject the change order, follow these steps:

1. On the Attachment Overview page, click the Previous button on the menu bar.

2. On the Contract Change Order Summary page, select the following decision from the component Actions menu:
   a. If approving the change order, then select Approve.
   b. If rejecting the change order, then select Reject.
3. In the **Approve** or **Reject** window, enter comments on your respective decision. *(Max 256 Characters.)*

**Note:** If the user is rejecting a change order, then please explain in detail why the change order is being rejected. This way the change order author will know what modifications to make on the change order before resubmitting for approval.

4. Click the **Save** button.

Upon making a decision on the change order, the system records the user decision on the change order. If the change order was approved, then the system records the decision and sends the notification to the ITD Approval Authority that it is ready for approval. If the change order was rejected, then the system records the decision, closes the approval round, and sets the change order’s status to **Rejected**. Upon rejection of the change order, the system will notify the change order author to modify the change order based on the user’s decision comments and resubmit for approval. After the change order author has made the appropriate modifications and resubmitted the change order for approval, the user (Contractor) will receive another email notification to review and approve the change order.

**Note:** Each time the Contractor or ITD Approval Authority rejects the change order, the system records the decision of either party, closes that approval round, and sets the change order status to Rejected. To start a new rounds of approvals, the change order author needs to make appropriate modifications and resubmit the change order for approval.
4. Payment Estimates

4.1 Overview of Payment Estimates

With the new system in place, the Contractor has the ability to review payment estimates in the system. Whether it’s progress or final payment estimate, the Contractor can review the report of each payment estimate. The Contractor also has the ability to approve final payment estimate electronically. This means the Contractor is no longer required to sign the Final Payment Estimate report.

*Payment Estimates* includes these topics:

- Review Payment Estimate Report
- Approve Final Payment Estimate

4.2 Review Payment Estimate Report

To generate a progress or final payment estimate report in the new system, follow these steps:

1. On the *AASHTOWare Project* homepage, under the *Construction* component, click the *Payment Estimates* hyperlink.

![Figure 17 - AASHTOWare Project Homepage](image)

![Figure 18 - Contract Payment Estimate Overview Page](image)
2. On the *Contract Payment Estimate Overview* page, locate a payment estimate with one of the following methods:
   a. Enter the contract number in the Quick Find search box.
   b. Press the **Enter** key in the Quick Find search box.
   c. Click **Show first 10** hyperlink to view first 10 results.

   **Please Note:** The user will only be able to view those contract payment estimates that they access to in the system. If they do not see anything, then please notify the residency Project Coordinator or the Resident Engineer.

3. On the *Contract Payment Estimate Overview* page, select and open the payment estimate by clicking on the **Number** hyperlink.

4. On the *Contract Payment Estimate Summary* page, select **Summary By Project Report** report from the component **Actions** menu.
5. To generate the report and view online as PDF, then select **Generate as PDF** option as the **Output Type**. *(This will be selected by default.)*

6. To download the report as PDF, then select **Download PDF** option as the **Output Type**.

7. Always choose ‘**Custom**’ as the **Report Layout Source**. *(This will be selected by default. Don’t change this option.)*

8. Click the **Execute** button to generate the report.
4.3 Approve Final Payment Estimate

After the ITD District Record Inspector (DRI) has audited and approved the final payment estimate, the Contractor will be notified via email to review and approve the final payment estimate. To approve/reject a final payment estimate, follow these steps:

1. On the AASHTOWare Project homepage, under the Construction component, click the Payment Estimate Approval Decisions hyperlink.

   ![Figure 22 - AASHTOWare Project Homepage](image)

   **Note:** If you do not see anything on this page, then it means you either already approved the payment estimate or your approval is not required on any payment estimate.

   ![Figure 23 - Payment Estimate Approval Decision Overview Page](image)

   This indicates that the final payment estimate has been approved by ITD lower two levels and now requires the Contractor approval at level three.

2. On the Payment Estimate Approval Decision Overview page, click the Number hyperlink to open the payment estimate for review.
3. On the *Contract Payment Estimate Summary* page, select **Summary By Project Report** report from the component **Actions** menu.

4. To generate the report and view online as PDF, then select **Generate as PDF** option as the **Output Type**. *(This will be selected by default.)*

5. To download the report as PDF, then select **Download PDF** option as the **Output Type**.

6. Always choose ‘**Custom**’ as the **Report Layout Source**. *(This will be selected by default. Don’t change this option.)*

7. Click the **Execute** button to generate the report.

After reviewing the report, switch back to first tab (Generate Report Page) and from the Previous dropdown menu, select Payment Estimate Approval Decision Overview hyperlink.

10. Select your decision (Approve or Reject) from the Approval Decision dropdown menu.

11. Enter comments in the Comments field. (This is an optional field.)

12. Click the Save button. (Upon saving, the payment estimate approval decision row disappears.)

Upon making a decision, the system displays the ‘Save’ message on the top of the page and records the decision on the payment estimate. If the payment estimate is approved, the system will record the decision and notify the next level approval member (ITD Resident Engineer). If the payment estimate is rejected, then system records the decision, closes the approval round, and notifies the Project Coordinator. The Project Coordinator then reviews the suggestion, make additional modifications, and resubmits the payment estimate for approval.