



AASHTOWare Project Construction

ITD Subject Matter Experts Construction Management User Guide

Version 2.0

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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 internal and external Subject Matter Experts (SMEs) such as ITD HQ Division of Engineering Managers or Federal Highway Administration (FHWA) personnel who may need to oversee a contract progress in the new system and may be required to provide their concurrence on a contract change order.

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](#)
- [Familiarizing Yourself with User Interface](#)
- [Using Actions Menu](#)
- [Icons](#)

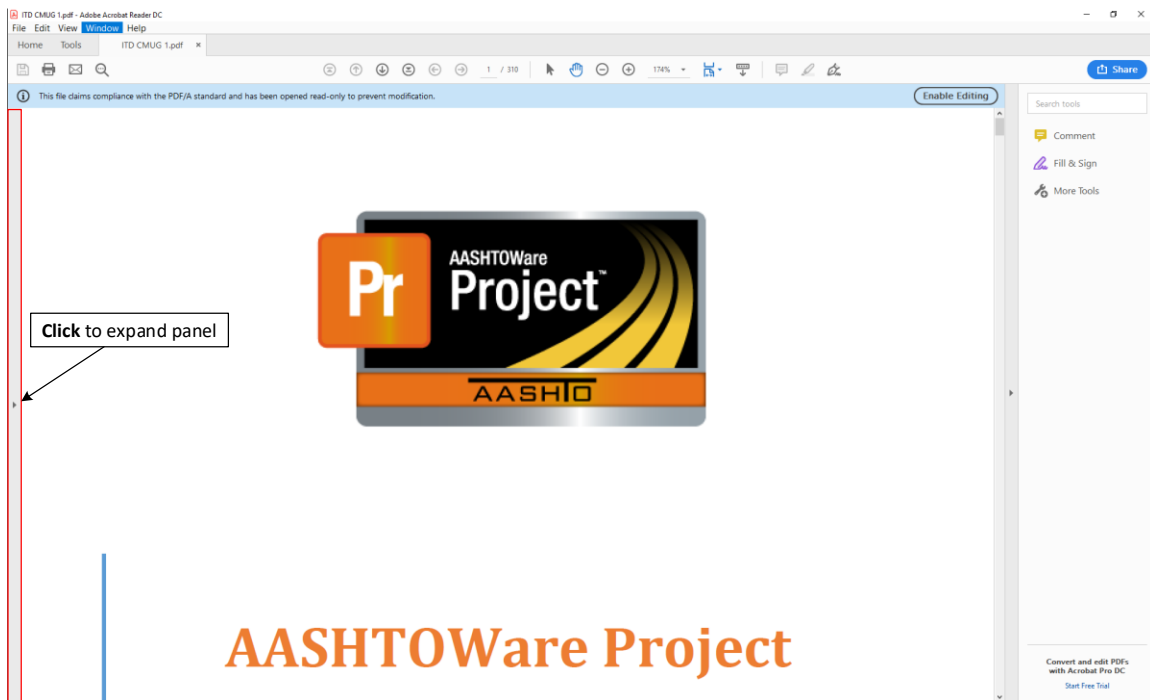
2.2 How to Navigate CMUG in PDF

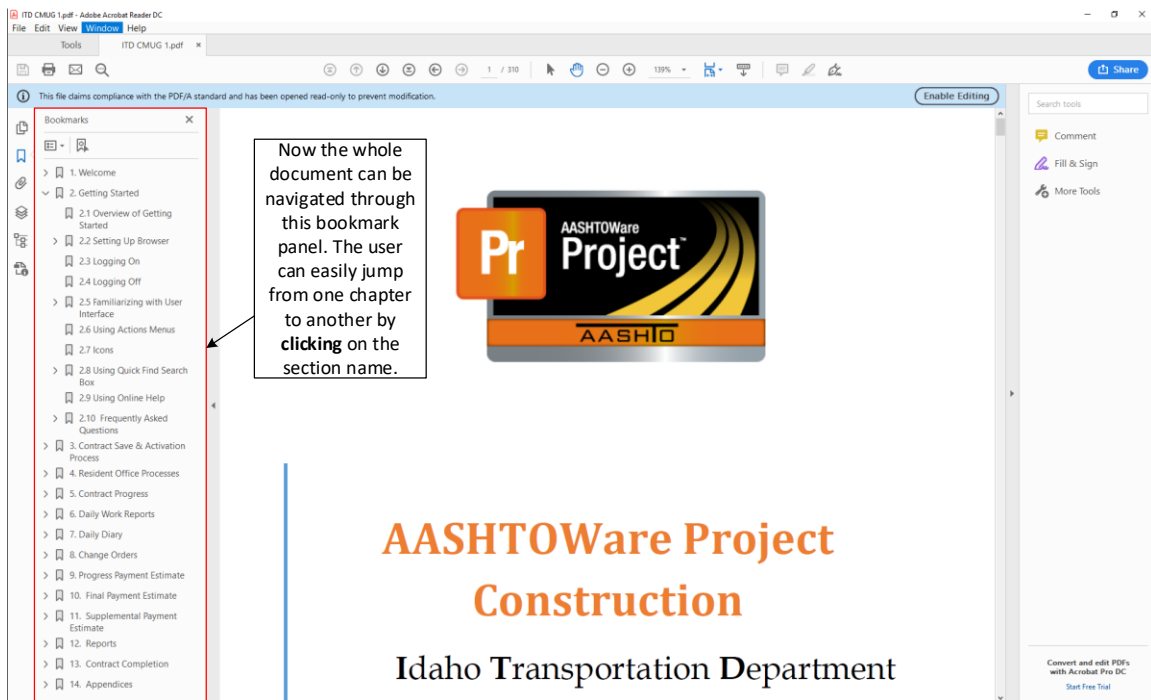
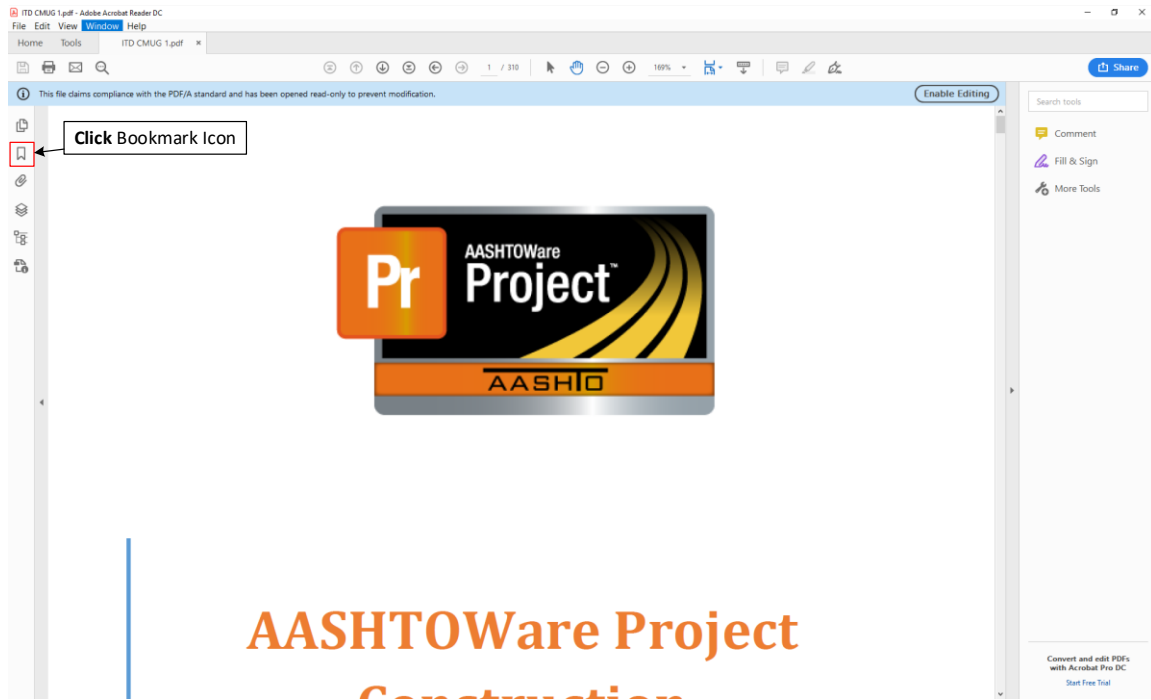
Due to AASHTOWare Construction Management User Guide (CMUG) big file size, navigating the document can be a bit challenge. There are some functions the user can utilize in the PDF application to efficiently navigate CMUG without wasting their valuable time.

 **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

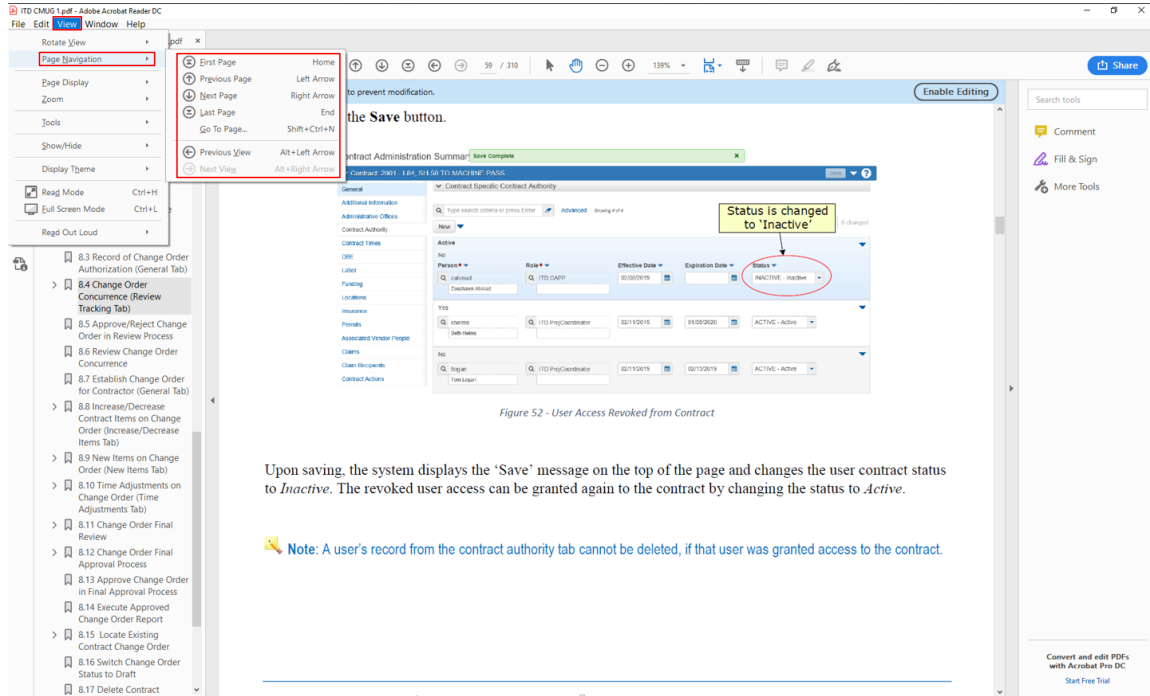
In Adobe, one way the user can interact with the document is by enabling the table of contents which gives the user the ability to have more control of the document. This eliminates the infinite scrolling to find the right page with right information. To enable table of contents, follow these instructions:





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:

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

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 the **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 the 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. If accessing the application using ITD network, then click here: <https://aashtoprojprod.itd.state.id.us>.
3. If accessing the application using external network, then click here: <https://itdcas.itd.idaho.gov>.
4. Enter your *ITD username* in the **Username** field.
5. Enter your *ITD password* in the **Password** field. (*Enter the most updated password.*)
6. Select **ITD Users** from the dropdown menu for the Domain.
7. 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.



The image shows the AASHTOWare Project login interface. At the top is the AASHTOWare Project logo. Below it is a login form with three input fields: 'Username', 'Password', and a dropdown menu for 'Domain'. Red arrows point to each field with labels: 'Your ITD Username' for Username, 'Your ITD Password' for Password, and 'Select This Option' for the Domain dropdown. The dropdown menu is currently set to 'ITD Users'. Below the fields is a blue 'Log On' button. To the right of the form is a yellow box with a black border containing the text: 'Note: If you are unable to log on to the AASHTOWare Project, please contact ITD Sponsor for assistance.'

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 an issue is encountered.

2.6 Logging Off

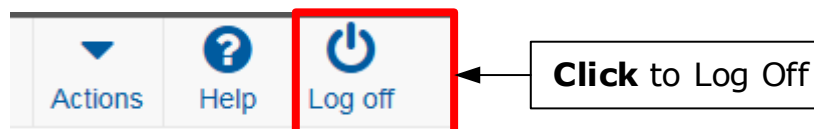


Figure 2 - AASHTOWare Project Log Off

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 the session and takes them back to the login page.

2.7 Familiarizing 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.

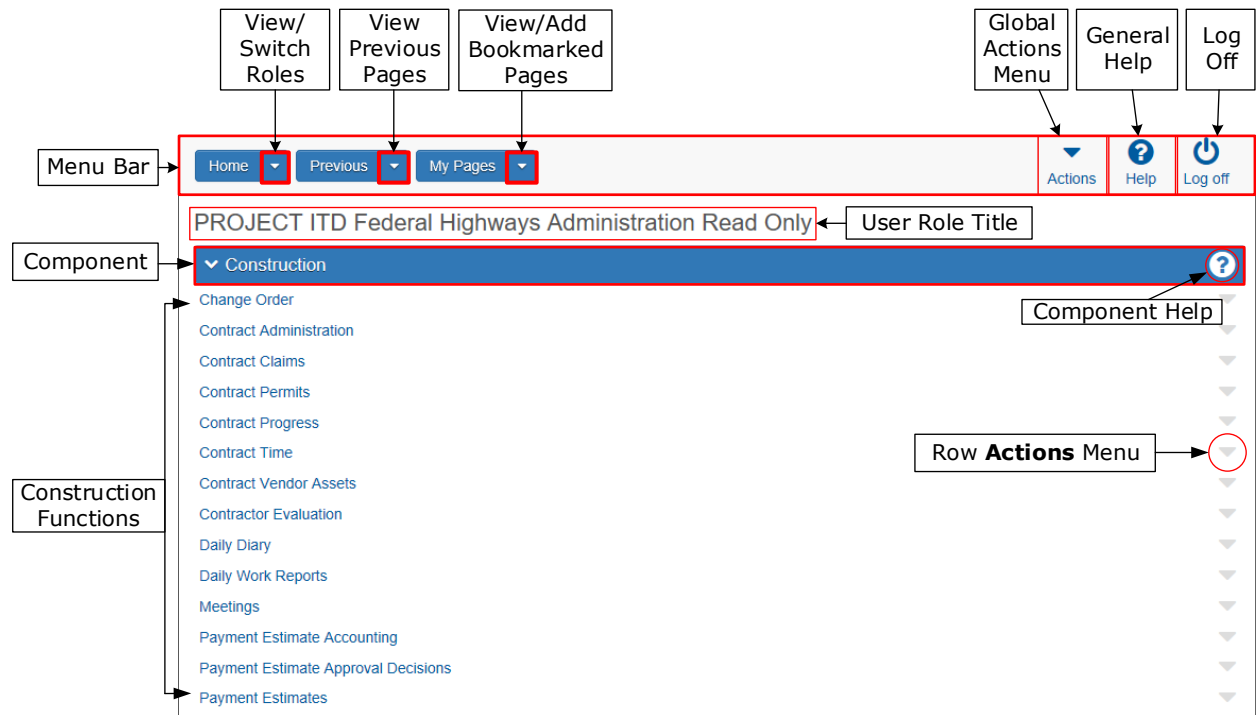



Figure 3 - AASHTOWare Project Dashboard

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 have 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

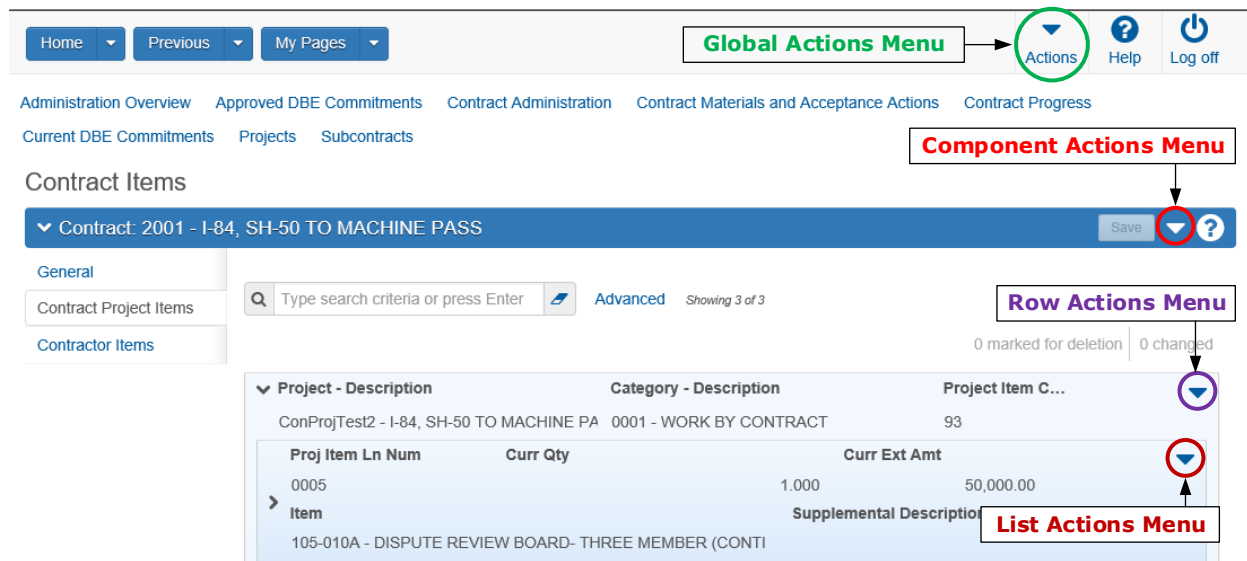



Figure 4 - Four Types of Actions Menus

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. (**Please 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** menus 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:

Icons	Usage
	The eraser icon appears in Quick Find search boxes after criteria is entered. The user can click the icon to reset the search criteria
	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 type. The user can press Enter to show all values.
	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.
	A red asterisk indicates a field where data entry is required.
	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.
	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.
	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.
	The undo icon appears on Undo buttons that the user can click to reverse an action, such as deleting a saved row.
	The help icon appears on Help buttons that the user can click to display the online Help system.
	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.

3. Contract Progress

3.1 Overview of Contract Progress

The Contract Progress Overview is the gateway to all of the information related to the progress of construction work associated with a contract. Contract progress information includes payment estimates, change orders, DWRs, contract and item adjustments, and more. The information in this component can be managed by the Inspector, Project Coordinator, and/or Resident Engineer.

Contract Progress includes these topics:

- [General Tab](#)
- [Financials Tab](#)
- [Daily Work Reports Tab](#)
- [Diaries Tab](#)
- [Diary Adjustments Tab](#)
- [Payment Estimates Tab](#)
- [Contractors Tab](#)
- [Change Orders Tab](#)
- [Contract Adjustments Tab](#)
- [Item Adjustments Tab](#)
- [Progress Schedule Tab](#)
- [Weekly Report Of Time Charges Tab](#)

3.2 Contract Progress General Tab

The **General** tab of the Contract Progress Summary page has all the contract information such as Contract ID, Federal/State Project Number, Prime Contractor, Spec Book, assigned Resident Engineer and Project Coordinator, and much more. To view information in the contract progress general tab, follow these steps:

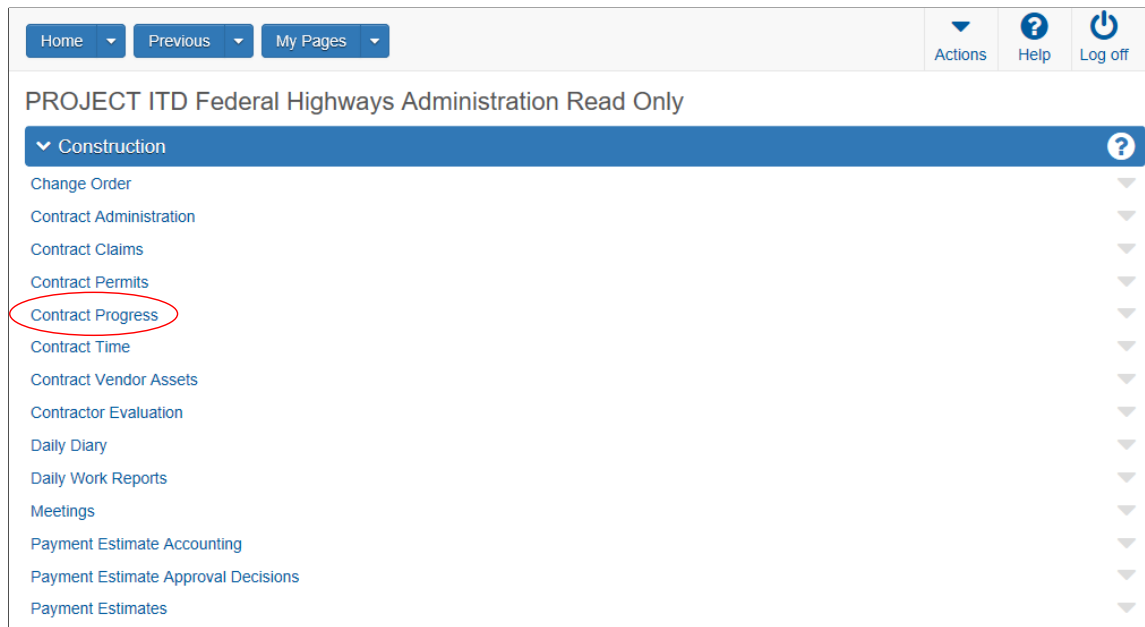


Figure 5 - AASHTOWare Project Homepage

1. On the *AASHTOWare Project* homepage, click the **Contract Progress** hyperlink under the Construction component.



Figure 6 - Contract Progress Overview Page

2. On the *Contract Progress Overview* page, enter the **Contract Number** in the search field or click the **Show first 10** link to view a list of contracts to choose from.
3. Locate and click the **Contract ID** to open the contract.

Contract Progress Summary

▼ Contract: 2001 - I-84, SH-50 TO MACHINE PASS ▼ ?

General	TAB
Financials	
Daily Work Reports	
Diaries	
Diary Adjustments	
Payment Estimates	
Contractors	
Change Orders	
Contract Adjustments	
Item Adjustments	
Progress Schedule	
Weekly Report Of Time Charges	
Stormwater Periods	
Earth-Moving Events	

Contract ID	2001	Proposal ID	ConstModTest
Description *	I-84, SH-50 TO MACHINE PASS	Work Authority #	I164780
Prime Contractor Id	Z9999	Federal Project Number	A019(593)
Prime Contractor Name	ITD TEST CONTRACTOR	State Project Number	
Contract Status	Active	Local Oversight	No
Contract Type	BID - Biddable Contract	Local Agency Office	
Spec Book	01	DBE Certification Status	Not Certified
Unit System	English	Resident Engineer	ksereduk Sereduk Ken
Highway / Route	I-84	Project Coordinator	ksereduk Sereduk Ken
Location	Midpoint		
Managing Office	Agency		
Comments			
Long Description	For the work of Interstate rehabilitation, bridge rehabilitation, Grade and super elevation correction, ramp realignment and drainage upgrades. On I-84 M.P. 181.27 to 188.00, EBL.		

Figure 7 - Contract Progress Summary Page (General Tab)

The contract progress summary page opens in the General tab with the contract general information. This is read-only information.

3.3 Contract Progress Financials Tab

The **Financials** tab on the Contract Progress Summary page displays financial information about the contract. The information on this tab is for viewing only and cannot be changed. To view information in this tab, follow these steps:

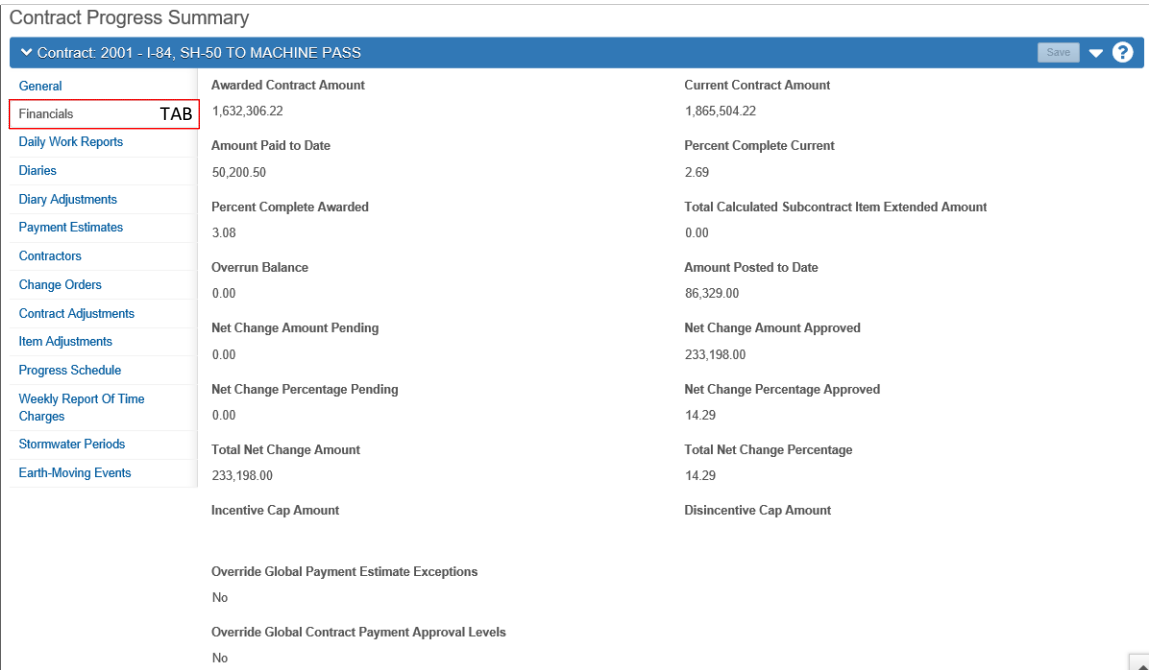


Figure 8 - Contract Progress Summary Page (Financials Tab)

1. On the *Contract Progress Summary* page, click the **Financials** tab on the left.

 **Tip:** If unsure about a field, hover mouse cursor over the field to view the field definition. (See figure below)

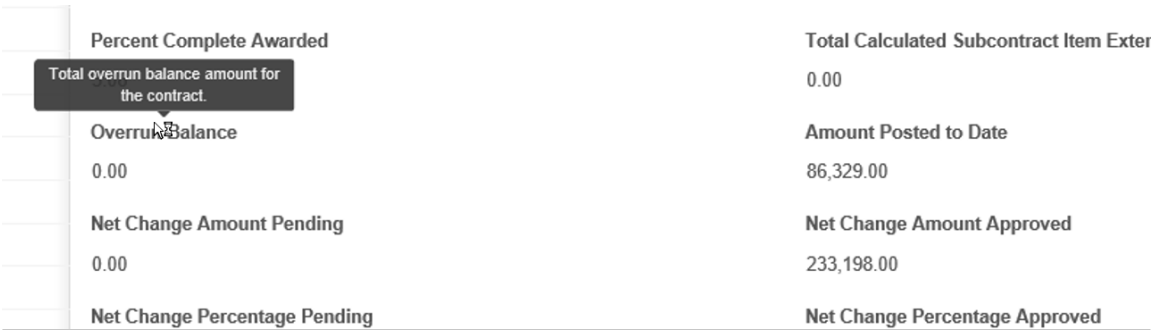


Figure 9 - Field Definition

3.4 Contract Progress Daily Work Reports Tab

The **Daily Work Reports** tab on the Contract Progress Summary page displays all the daily work reports created to date on the contract. To view daily work reports on the contract progress summary page, follow these steps:

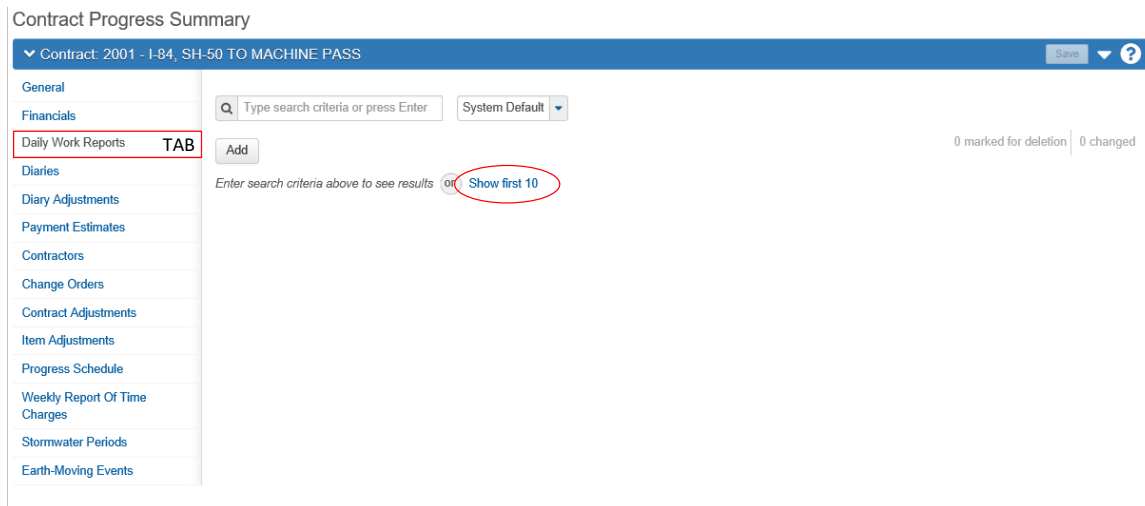


Figure 10 - Contract Progress Summary Page (Daily Work Reports Tab)

1. On the *Contract Progress Summary* page, click the **Daily Work Reports** tab on the left.
2. To view most recent DWRs created on this contract, either press the **Enter** key in the search field or click **Show first 10**.

The screenshot shows the 'Contract Progress Summary' page with the 'Daily Work Reports' tab selected. The table displays a list of DWRs. The first row is highlighted, and the 'Sequence' column is circled in red. The table has columns: DWR Date, Inspector, Status, Approval Date, Sequence, Attachments, Notes, Agency Views, and Work Items Installed. The first row shows a DWR dated 02/12/2019, inspected by Adam Hodges, with a status of 'Rejected'. The 'Sequence' column shows the number '1'. The 'Work Items Installed' column shows 'Yes'.

DWR Date	Inspector	Status	Approval Date	Sequence	Attachments	Notes	Agency Views	Work Items Installed
02/12/2019	Adam Hodges	Rejected		1	No	No	No	Yes
02/12/2019	Beau Pulse	Pending Approval		1	No	No	No	Yes
02/12/2019	Chuck Sharp	Pending Approval		1	No	No	No	Yes
02/12/2019	Justin Schoolcraft	Pending Approval		1	No	No	No	Yes

Figure 11 - Contract Progress Summary Page (Daily Work Reports Tab)

3. To view DWR in detail, click the **Sequence** hyperlink on the DWR row.

3.5 Contract Progress Diaries Tab

The **Diaries** tab on the Contract Progress Summary page displays all diaries created on this contract. To view diaries on the contract progress summary page, follow these steps:

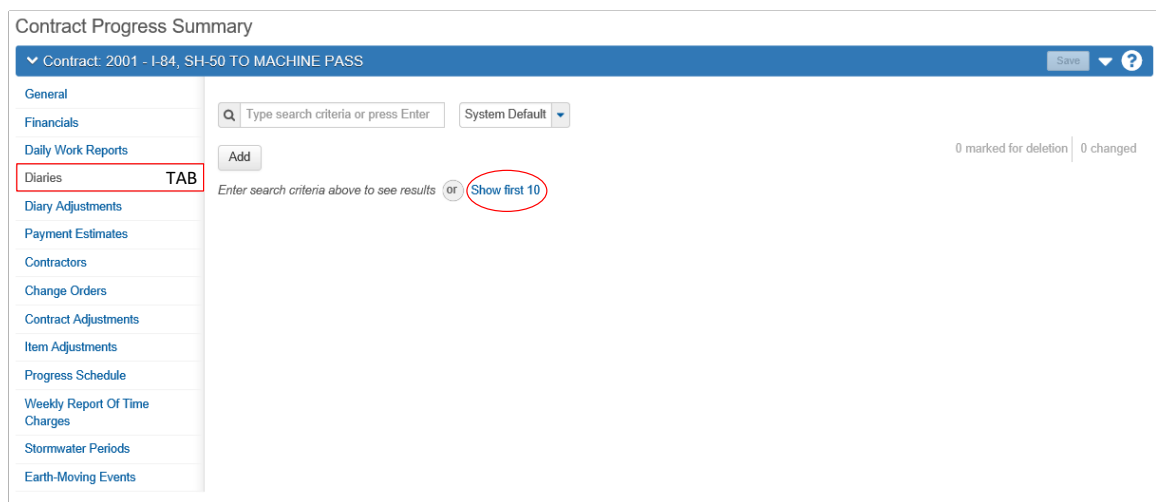


Figure 12 - Contract Progress Summary Page (Diaries Tab)

1. On the *Contract Progress Summary* page, click the **Diaries** tab on the left.
2. In the *Diaries* tab, to view the most recent created diaries, either press the **Enter** key in the search field or click **Show first 10**.

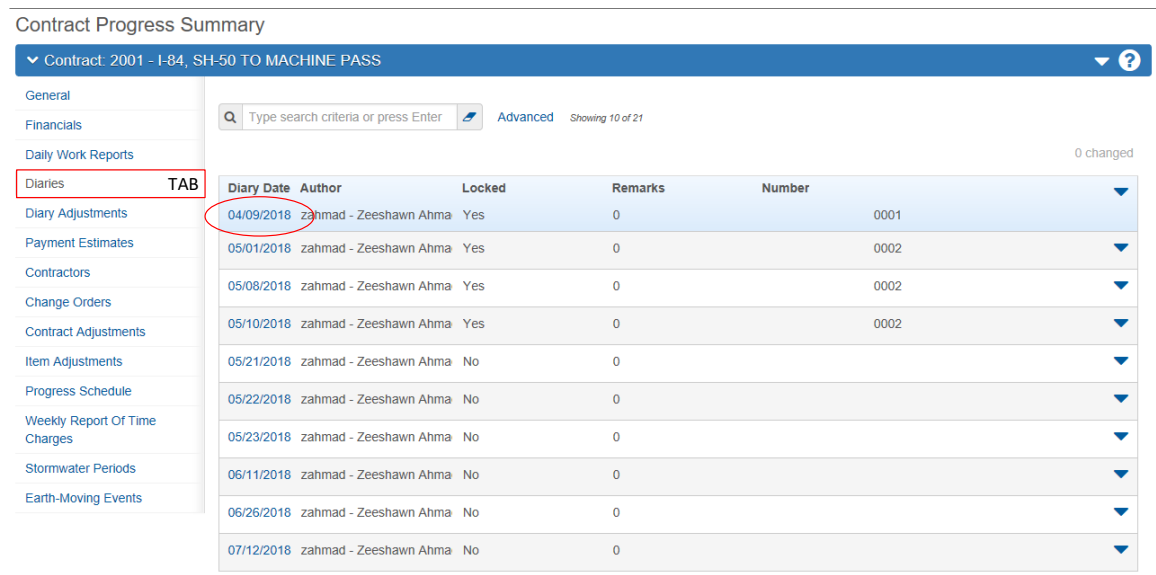


Figure 13 - Contract Progress Summary Page (Diaries Tab)

3. To view Diary in detail, click the **Diary Date** on the Diary row.

3.6 Contract Progress Diary Adjustments

The **Diary Adjustments** tab on the Contract Progress Summary displays locked diaries adjustments. To view locked diaries adjustments on the contract progress summary page, follow these steps:

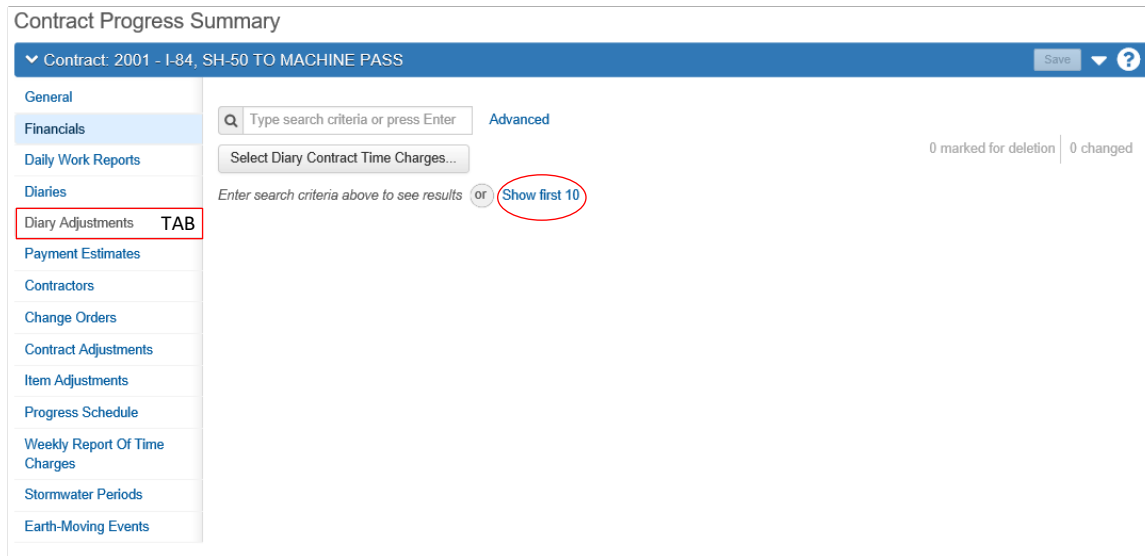


Figure 14 - Contract Progress Summary Page (Diary Adjustment Tab)

1. On the *Contract Progress Summary* page, click the **Diary Adjustments** tab on the left.
2. To view the most recent locked diaries adjustments, either press the **Enter** key in the search field or click **Show first 10**. (The system will display all locked diaries adjustments that was made on the contract.)

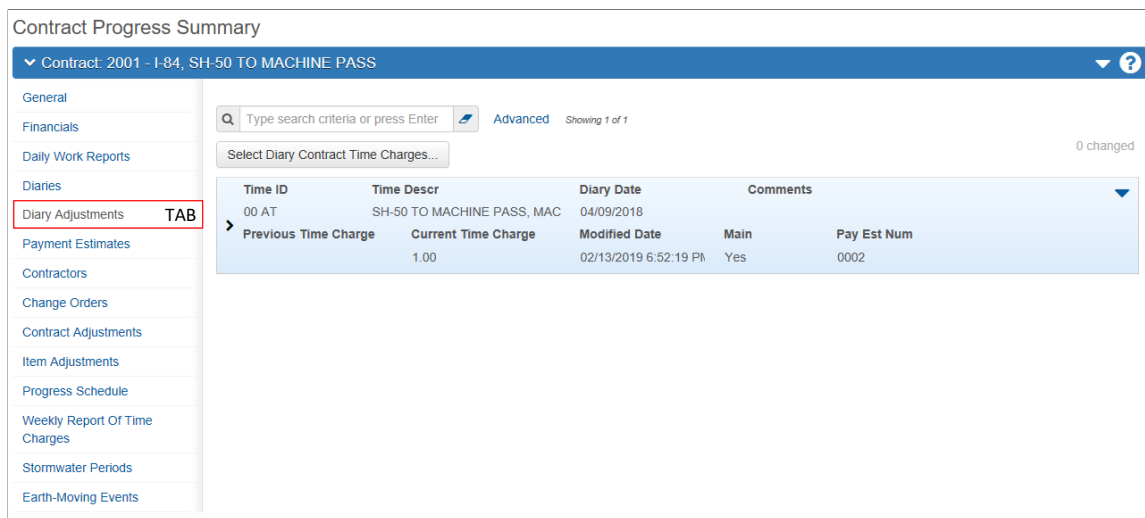


Figure 15 – Contract Progress Summary Page (Diary Adjustment Tab)

3.7 Contract Progress Payment Estimates Tab

The **Payment Estimates** tab on the Contract Progress Summary displays all the payment estimates recorded for the contract. To view payment estimates on the contract progress summary page, follow these steps:

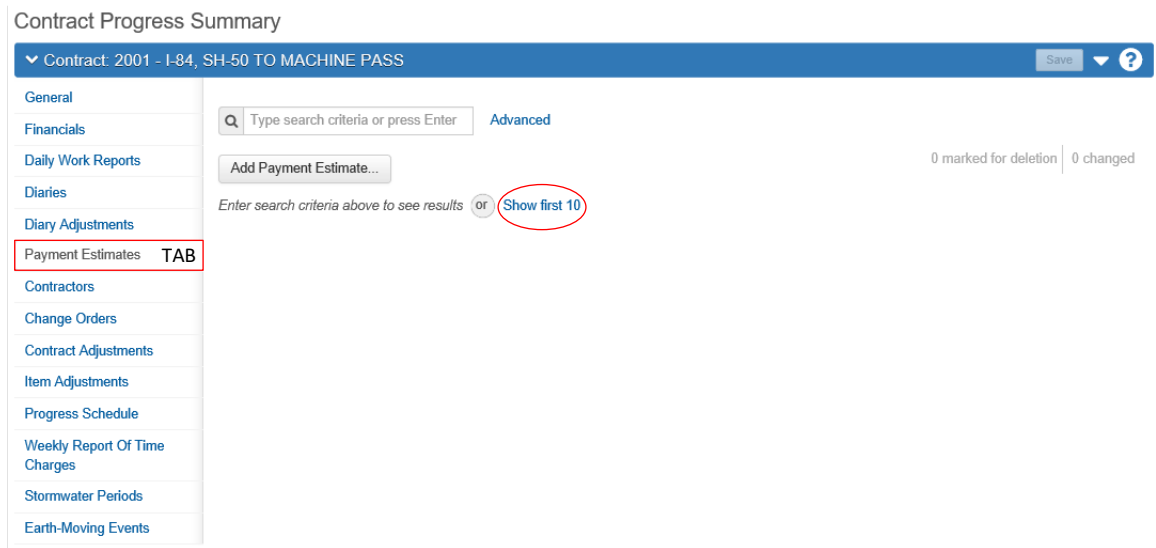


Figure 16 - Contract Progress Summary Page (Payment Estimates Tab)

1. On the *Contract Progress Summary* page, click the **Payment Estimates** tab on the left.
2. To view list of payment estimates, press the **Enter** key in the search field or click **Show first 10**.

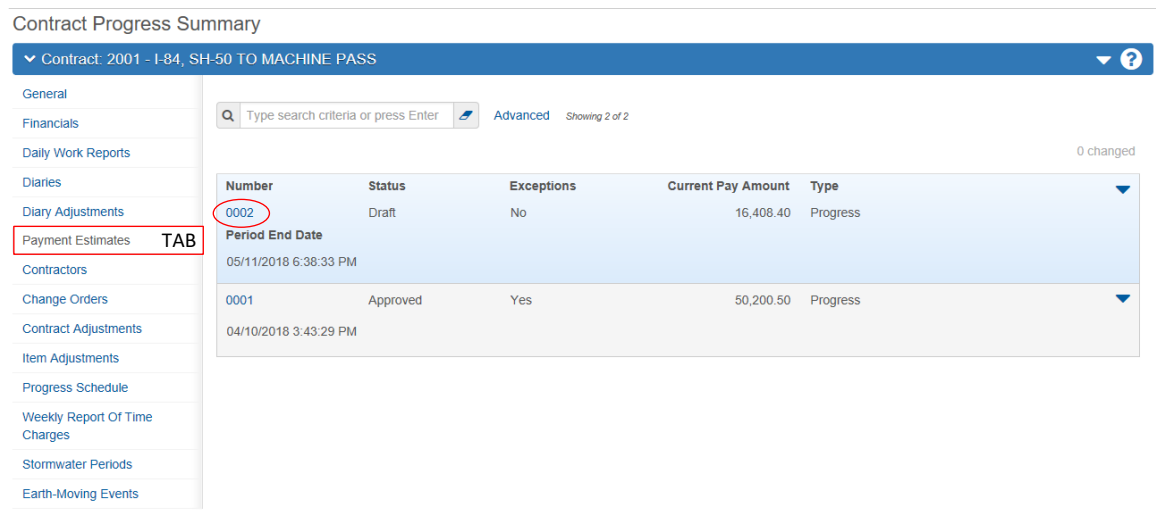
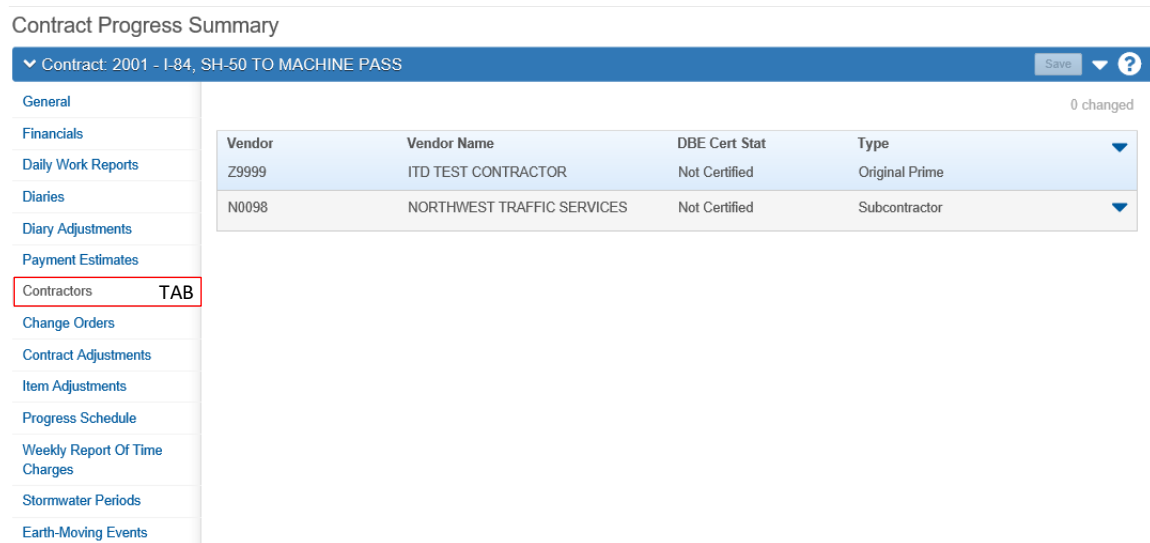


Figure 17 - Contract Progress Summary Page (Payment Estimates Tab)

3. To view the payment estimate, click the **Number** hyperlink in the payment estimate row.

3.8 Contract Progress Contractors Tab

The **Contractors** tab on the Contract Progress Summary displays all the contractors including the prime and subs on the contract. To view the contractor(s) list, follow these steps:



Contract Progress Summary

▼ Contract: 2001 - I-84, SH-50 TO MACHINE PASS Save ?

0 changed

Vendor	Vendor Name	DBE Cert Stat	Type
Z9999	ITD TEST CONTRACTOR	Not Certified	Original Prime
N0098	NORTHWEST TRAFFIC SERVICES	Not Certified	Subcontractor

Figure 18 - Contract Progress Summary Page (Contractors Tab)

1. On the *Contract Progress Summary* page, click the **Contractors** tab on the left.

The system displays all the contractors including the prime and subs on this page.

3.9 Contract Progress Change Orders

The **Change Orders** tab on the Contract Progress Summary page allows the user to view a list of all change orders on the contract. It also enables them to add a new, modify, or delete a change order. To view all the change orders on the contract progress summary page, follow these steps:

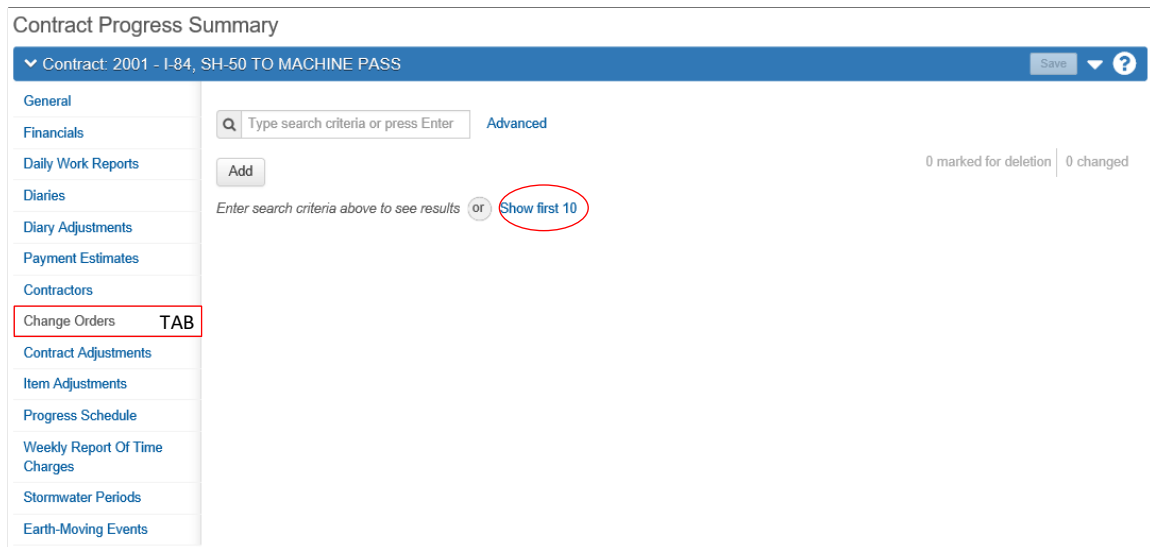


Figure 19 - Contract Progress Summary Page (Change Orders Tab)

1. On the *Contract Progress Summary* page, click the **Change Orders** tab on the left.
2. To view the most recent change orders, press the **Enter** key in the search field or click **Show first 10**.

Contract Progress Summary

Contract: 2001 - I-84, SH-50 TO MACHINE PASS

General

Financials

Daily Work Reports

Diaries

Diary Adjustments

Payment Estimates

Contractors

Change Orders **TAB**

Contract Adjustments

Item Adjustments

Progress Schedule

Weekly Report Of Time Charges

Stormwater Periods

Earth-Moving Events

Search: Type search criteria or press Enter Advanced Showing 7 of 7

Add

0 changed

CO Num	Status	Amount	Type	Reason
0007	Pending Approval	250.00	0020 - Change in Specification	0020 - Differing Site Conditions
Change Order Details				
Change Order Date		Current Approval Group	Approval Date	Description
02/12/2019		Contractor Approval Grou		Excessive Snow
0006	Approved	200,000.00	0010 - Change in Plans	0025 - Extra Work
02/11/2019			02/11/2019	Change in PlansBackground
0005	Draft		0010 - Change in Plans	0010 - Design Error
01/31/2019		Resident Engineer Apprc		Change order number 5 Ab
0004	Approved	12,100.00	0035 - Quantity Variance	0005 - Design Field Change
02/11/2019			02/11/2019	Extra WorkYou are ordered
0003	Approved	-4,372.00	0035 - Quantity Variance	

Figure 20 - Contract Progress Summary Page (Change Orders Tab)

3. To view the change order, click the **CO Num** hyperlink in the Change Order row.

3.10 Contract Progress Contract Adjustments Tab

The **Contract Adjustments** tab on the Contract Progress Summary provides information about payment estimate adjustments at the contract level. Information is provided for all contract adjustments that exist for the entire contract (that is, for all payment estimates on this contract), including those generated by the system and manually-added adjustments. To view contract adjustments on the contract progress summary page, follow these steps:

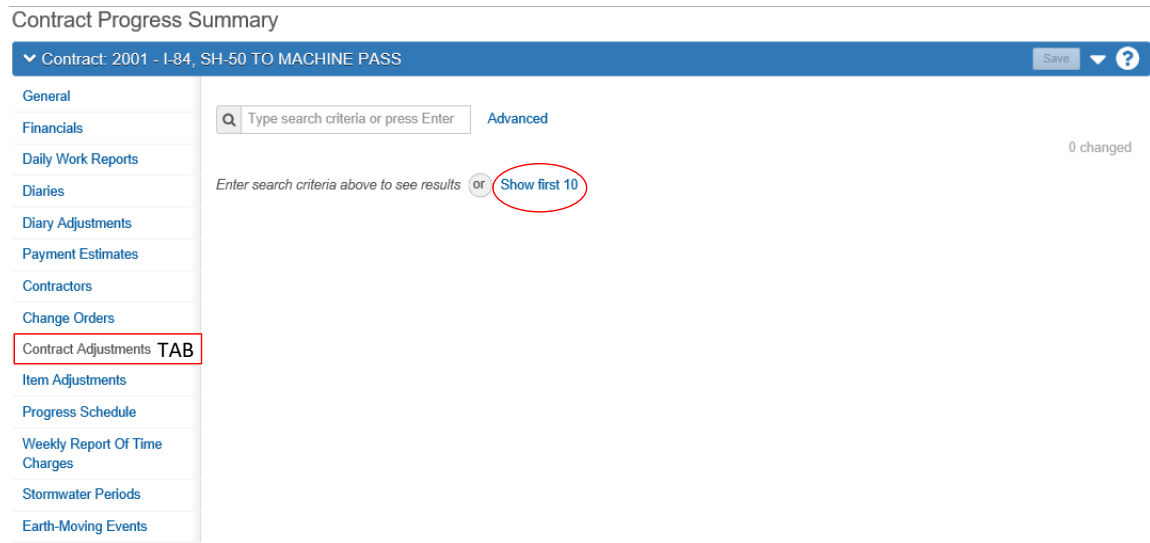


Figure 21 - Contract Progress Summary Page (Contract Adjustments Tab)

1. On the *Contract Progress Summary* page, click the **Contract Adjustments** tab on the left.

The system displays all the system or user based contract adjustments made on this contract with payment estimates, if any.

3.11 Contract Progress Item Adjustments Tab

The **Item Adjustments** tab on the Contract Progress Summary provides information about payment estimate adjustments at the item level. Item adjustments can result from item overruns, price changes, stockpile adjustments, and for other reasons. To view item adjustments on the contract progress summary page, follow these steps:

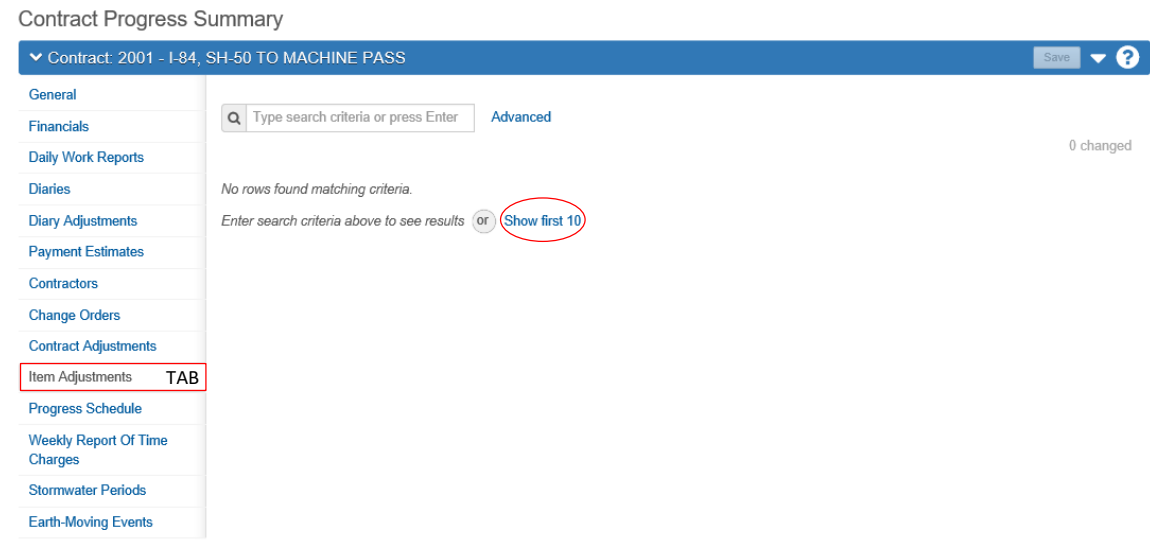


Figure 22 - Contract Progress Summary Page (Items Adjustments Tab)

1. On the *Contract Progress Summary* page, click the **Item Adjustments** tab on the left.

The system displays all the system or user based item adjustments made on this contract with payment estimate, if any.

3.12 Contract Progress Schedule Tab

The **Progress Schedule** tab on the Contract Progress Summary displays a schedule created by the Project Coordinator and/or the Resident Engineer to track the contract progress. To view the contract progress schedule on contract progress summary page, follow these steps:

Contract Progress Summary

▼ Contract: 2001 - I-84, SH-50 TO MACHINE PASS

Save ▼ ?

General

Financials

Daily Work Reports

Diaries

Diary Adjustments

Payment Estimates

Contractors

Change Orders

Contract Adjustments

Item Adjustments

Progress Schedule **TAB**

Weekly Report Of Time Charges

Stormwater Periods

Earth-Moving Events

Progress Schedule Type

Percent Complete for a Time Period ▼

Main Contract Time - Time Type

Available Time

Main Contract Time - Time Unit

Days

Start Time for Progress Schedule

3/19/2018 7:31:52 AM

Main Contract Time - Final Schedule Time

112.00

Main Contract Time - Final Schedule Date

▼ Progress Schedule Actuals to Date

0 changed

No rows found matching criteria.

▼ Progress Schedule Projections

Sched Time	Sched Dt	Projected Pct Cmpl
14.00	04/02/2018	20.00

Figure 23 – Contract Progress Summary Page (Progress Schedule Tab)

1. On the *Contract Progress Summary* page, click the **Progress Schedule** tab on the left.

3.13 Contract Progress Weekly Report of Time Charges Tab

The **Weekly Report of Time Charges** tab on the Contract Progress Summary lists records of weekly reports generated for different contract times. Each record provides access to a historical report that details the number of hours charged for the selected contract time as recorded on DWRs during a specific week. The user can generate the historical report by selecting **Weekly Report of Time Charges** from the Historical Reports section of the row **Actions** menu.

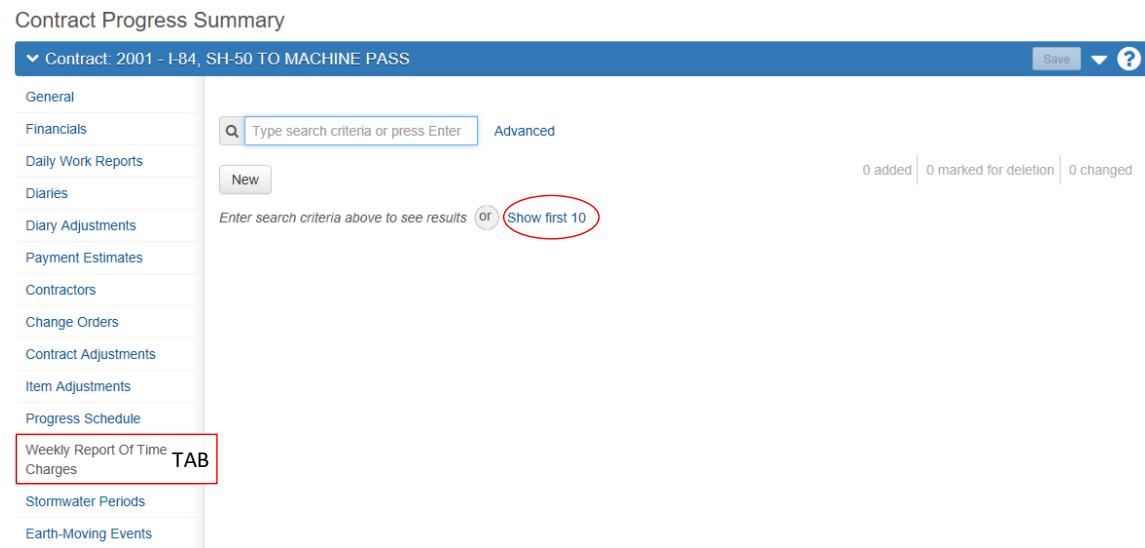


Figure 24 - Contract Progress Summary Page (Weekly Report of Time Charges Tab)

1. On the *Contract Progress Summary* page, click the **Weekly Report Of Time Charges** tab on the left.
2. To view list of generated historical reports, Click **Show first 10**.

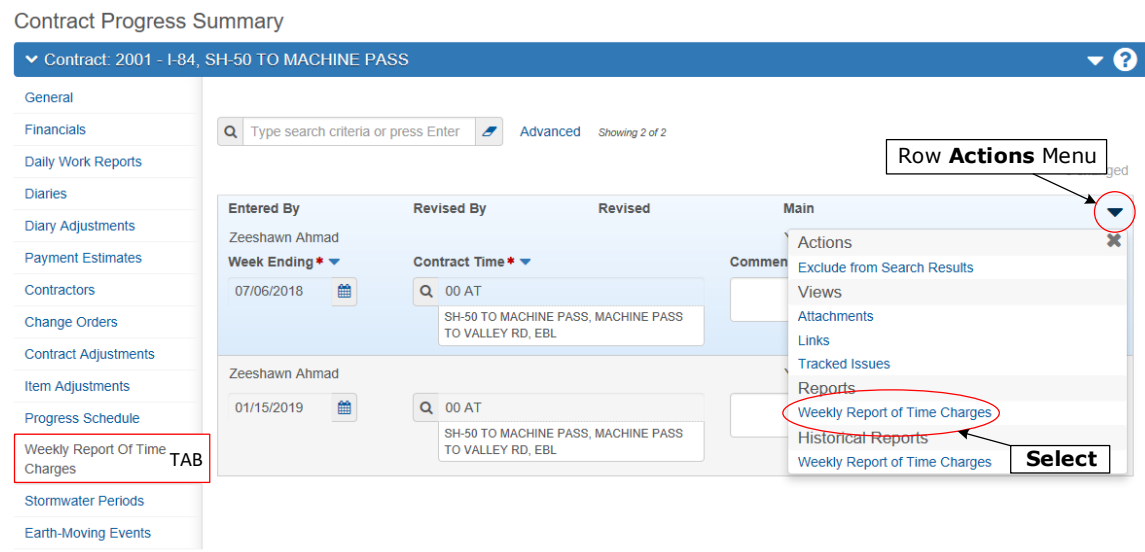


Figure 25 - Contract Progress Summary Page (Weekly Report of Time Charges Tab)

3. To generate the weekly report of time charges, select **Weekly Report of Time Charges** from the row **Actions** menu.


4. Change Order Concurrency

4.1 Overview of Change Order Concurrency

After the Project Coordinator or the Resident Engineer drafts the change order authorization (ITD-2317) in the AASHTOWare Project software, they will assign reviewers to obtain concurrence on the change order authorization. The reviewers will be notified via email to review and concur with the change order in the system. This process replaces the ITD-2317 form and process to obtain change order concurrences and authorization by the ITD Approval Authority.

4.2 Approve/Reject Change Order in Review Process

If you are an internal or external assigned reviewer on the change order review process, you will be notified via email to make a decision on the change order. To approve or reject a change order in the review process, follow these steps:

 **Please Note:** Only the change order Approval Authority can authorize the change order. When the Approval Authority “approves” the change order in the system, the change order is authorized. Reviewers other than the Approval Authority are indicating their concurrence or non-concurrence with the change order by selecting Approve or Reject in the review process. The Approval Authority may wish to see the concurrences by other reviewers prior to authorizing the change order.

 **Important:** Only the assigned reviewers can approve/reject a change order in the review process.

If you are a FHWA personnel, then you will be assigned with **FAPP** (Federal Approval) role.

If you are an ITD employee or external SME, then you will be assigned with **HPO** (Highway Project Oversight) role.

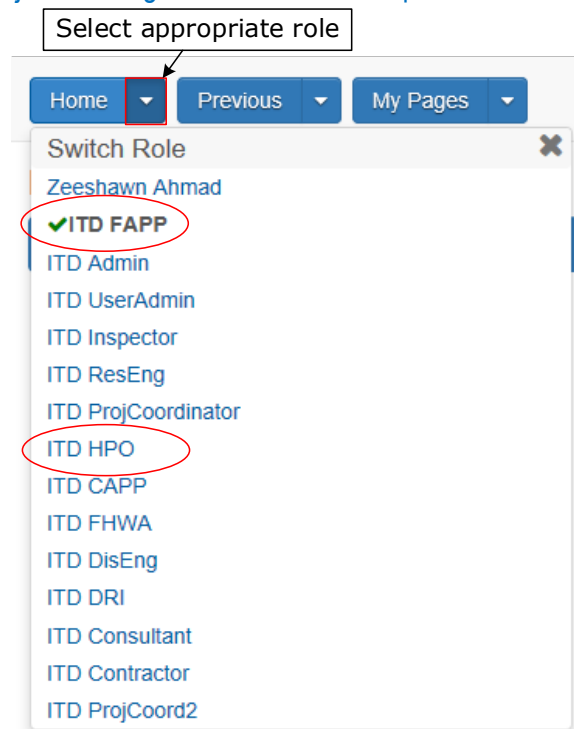


Figure 26 - Select an Appropriate Role.

1. On the *AASHTOWare Project* homepage, select an appropriate role from the dropdown menu next to the **Home** button. (This only applies if you have multiple roles in the system.)

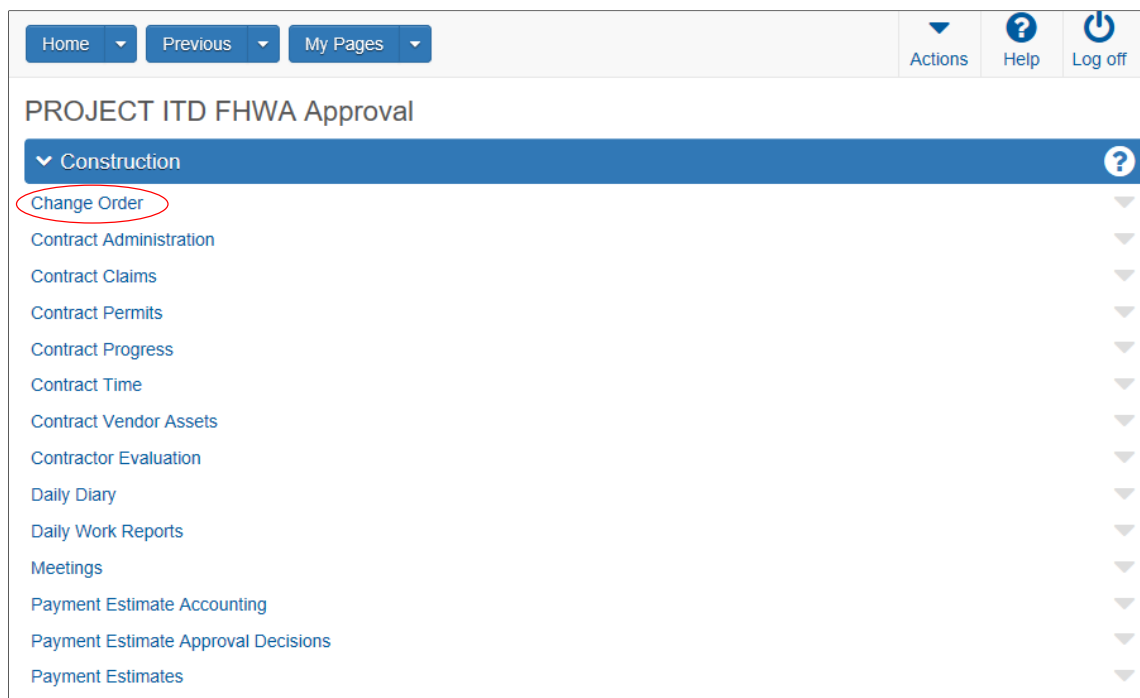


Figure 27 - AASHTOWare Project Homepage

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

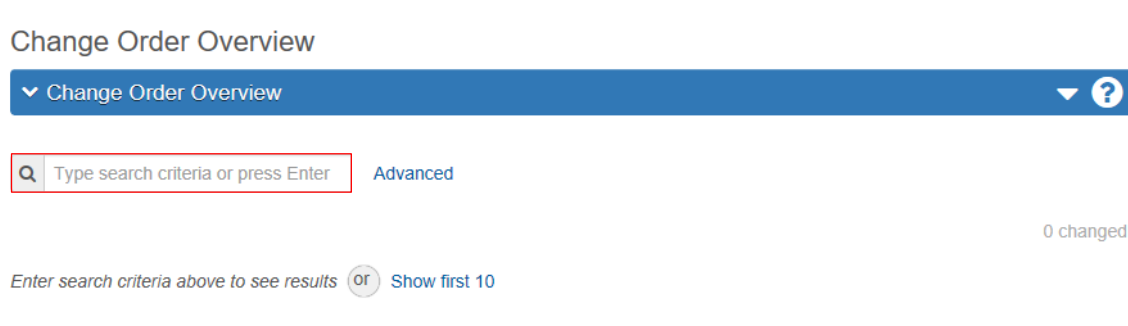


Figure 28 - Change Order Overview Page

3. Press the **Enter** key or type the **Contract Number** in the Quick Find search box.

Select the Change Order with *Pending Review* Status.

Note: If there are multiple Change orders with *Pending Review* Status, then **select** the appropriate change order that requires your concurrence.

Contract Id	CO Num	Status	Amount	Type	Reason
8280	0006	Pending Review	24,044.09	0010 - Change in Plans	0025 - Extra Work
CO Date	Current Approval Group	Approval Date	Description		
03/26/2019			Extra Work		
8280	0005	Approved	5,351.56	CO - Change Order	0025 - Extra Work
11/05/2018		11/05/2018	Extra WorkYou are ordered to pe		
8280	0004	Approved	4,023.50	0010 - Change in Plans	0050 - Contractor Request for Chan
11/05/2018		11/05/2018	CHANGE IN PLANSYou are orde		
8280	0003	Draft		0010 - Change in Plans	0025 - Extra Work
10/01/2018			Restriping configuration		
8280	0002	Pending Review	0.00	CO - Change Order	0025 - Extra Work
10/15/2018			changing Items		
8280	0001	Approved	4,500.00	0010 - Change in Plans	0020 - Differing Site Conditions

Figure 29 - Change Order Overview Page

- Select an appropriate change order with *Pending Review* status by clicking on the CO Number.

Contract Change Order Summary

Contract: 8280 - US 20, INT FARMWAY RD

Change Order: 0006 Amount: 24,044.09 Status: Pending Review

General

Increase/Decrease Items

New Items

Time Adjustments

Contract Claims

Review Tracking

Approval Tracking

Change Order Date

Extra work

Change Order Type *

0010 - Change in Plans

Author *

sking

King Shawna

Reason

0025 - Extra Work

Unilateral

No

Explanations

1

2

Change Order

Approval Date

Entered By

sking - ITD/shking

Entered Date

02/07/2019 2:42:11 PM

Current Approval Round

2

Current Approval Group

Components **Actions** Menu

There are no actions available.

Views

Attachments

Issues

Links

Reports

Change Order Report

Historical Reports

Contractor Change Or

Select

Note: The change order status is 'Pending Review'.

Figure 30 - Contract Change Order Summary Page (General Tab)

- On the *Contract Change Order Summary* page, select **Change Order Report** from the component **Actions** menu.

Generate Report

Generate Report - Change Order Report Execute ?

Settings Output Options 4 of 5 ← →

Output Type

☒ Generate as PDF

☐ Download PDF

☐ Generate as HTML

Report Layout Source

☐ Base

☒ Custom

☐ Test

Generate Available Data Output

☐

Figure 31 - Generate Report Page

- On the *Generate Report* page, click the **Execute** button. (Make sure **Output Type** is 'Generate as PDF' and **Report Layout Source** is 'Custom'.)

EXAMPLE OF CHANGE ORDER REPORT

On the first page of the change order report, the **Record of Change Order Authorization** will be documented in the **Explanation** field. Review this section carefully as it states why this change order is required.

13:27:25
01.164.01
Report v1

Change Order

Contract: 8280, US 20, INT FARMWAY RD

Prime Contractor: I0019, STAKER & PARSON COMPANIES dba IDAHO MATERIALS & CONSTRUCTION

CO Number: 0006

Revision No.: 2

CO Status: Pending Review

Change Order Date: 3/26/2019

Entered By: Shawna King

Last Updated By: Zeeshawn Ahmad

Fed. Proj. No.: A018(852)

Awarded Contract Amount: \$405,157.00

District: 38133 D3 Design Construction C Shawna King

Administrative Officer: RES-Residency-38133

Route: US 20/26

County: C014-Canyon

Location: US 20/26, Intersection Farmway Rd., Canyon County

Project(s): 18852, US 20, Int Farmway Rd

Description: Extra Work

CO Type: Change in Plans

CO Approval Date:

Last Updated Date: 3/29/2019

Net CO Amount: \$24,044.09

Resident Engineer:

Explanation: Record of Change Order Authorization **REASON FOR CHANGE:** Cattle and other trucks turning onto Kent Road must wait in the westbound through lane to turn left onto Kent Road (same as before the project), but with the new eastbound turn lane, their view to see oncoming traffic is now obstructed. These changed are to accommodate a left turning movement from US20 Westbound onto Kent Ranch Road and a left turning movement from US20 Eastbound into the Stinker approach from US20. The painted island needs to be reconfigured to allow legal movement from this center lane.

WORK DESCRIPTION: Obliterate the existing inside stripe on the current double yellow lines and the bullnose on the termination end of the center lane at the Farmway/Kent Ranch Rd. intersection on US20. Restripe the inside line with a yellow skip line (cycle 12'- 38') to replace the solid yellow line. Two preformed thermoplastic turn lane-use arrows will be placed within the center lane.

ESTIMATED COST: \$4,600.00

ESTIMATED TIME IMPACTS: 5 working days will be added for this work.

Contract: 8280 CO Number: 0006 Revision No.: 2 Page: 1 of 4

- After reviewing the report, go back to the AASHTOWare application to provide decision.

Figure 32 - Generate Report Page

8. On the *Generate Report* page, click the **Previous** button to go back to the *Change Order Summary* page.

Figure 33 - Approve/Reject Change Order in Review Process

9. Once reviewed, approve/reject the change order in review process by selecting **Approve/Reject** from the *Contract* component **Actions** menu.

Figure 34 - Reviewer Decision Comments

10. In the *Approve* window, enter comments in the **Approval Decision Comments** field.

11. Click the **Save** button.

Please Note: Upon approval in the review process, the change order status stays *Pending Review*. In order to start establishing change order for the contractor, the user must change the status of the change order back to *Draft* and then start documenting change order details.

Contract: 2001 - I-84, SH-50 TO MACHINE PASS

Change Order: 0004 Amount Status: Pending Review

General
Increase/Decrease Items
New Items
Time Adjustments
Contract Claims
Review Tracking TAB
Approval Tracking

Search: Type search criteria or press Enter Advanced Showing 1 of 1 Rounds: Latest Only 0 changed

Reviewer Name	Ro...	Added Date	Decision	Decision Date
Zeeshawn Ahmad	7	02/01/2019	Approved	02/01/2019

Reviewer Name: Zeeshawn Ahmad **Decision: Approved** (Reviewer Decision)

Reviewer Title: Decision Date: 02/01/2019

Reviewer Added Date: 02/01/2019 Decision Comments: I concur with this change order.

Round: 7 The number of rounds it took to obtain concurrence on this change order in the review process.

Figure 35 - Reviewer Approval Tracking

Upon making a decision on the change order in the review process, the reviewer decision will be updated in the review tracking tab of the change order. If concurrence has been obtained on the change order, then the Project Coordinator or Resident Engineer can start establishing the change order for the contractor. If the change order is rejected, then the Project Coordinator or Resident Engineer can modify the suggested changes provided by the reviewer and submit the change order again for review.

5. Reports

5.1 Overview of Reports

The new system gives the user the ability to generate various reports in the system.

Reports include these topics:

- [Report Types](#)
- [Generate Report](#)
- [Scheduling a Report](#)

5.2 Report Types


The AASHTOWare Project Software is capable of generating numerous reports that can be utilized by the business. Here is the list of reports:

Report Type	Description
Change Order Report	This report contains ITD-2317 and ITD-400 forms information along with new items, existing items quantity increased/decreased, time adjustments, and approvals with date/time stamp.
Contractor Change Order Report	This report contains just ITD-400 form information along with new items, existing items quantity increased/decreased, time adjustments, and approvals with date/time stamp.
Contract Status Report	This report summarizes all contract activities throughout the contract lifecycle.
Contract Time Report	The Contract Time Report summarizes information about each time record in a contract. For each contract time record, the report presents the contract, time type and unit, rates for incentives and liquidated damages, time start and other applicable dates, extended total amount applied, and estimate charges that have been made to date.
Daily Diary Report	The Daily Diary Report lists information from one or more selected daily diaries, including the date, weather, and location, and the name of the prime contractor and whether or not the contractor worked on that day. The report also provides totals for contract time, which varies depending on whether the main contract time is Available Time, Calendar Time, or Completion Date.
DWR Report	The DWR Report contains all the general information recorded in a single daily work report (DWR), including items, quantities, and force account details, if any.
ITD Diary Time Accounting Report (ITD Custom Report)	This is ITD custom time accounting report that contains contract time details and description of each day the time is charged or not charged.
ITD Payment Estimate for Contractor Report (ITD Custom Report)	This is ITD custom estimate report for the contractor. This report contains estimate summary including change orders, contract time, posted items, contract and items adjustments, and history of approvals.
Item History to Date Report	The Item History to Date report contains detailed information about the current status of a work item, including the quantity posted to date, the amount paid to date, and whether the work item has been completed. For each contract item selected, the report

	lists details about the item, associated projects and categories, contractors, DWR item postings, payment estimates, change orders that modify the item, and any remaining stockpile amounts.
Item Posting by Item Report	The Item Posting by Item report contains summary information for the specified contract items, as well as the list of all item postings within a specified time frame for a work item.
Stockpile Summary Report	The Stockpile Summary Report lists all the stockpile transactions made on the contract.
Subcontractor Listings	The Subcontractor Listings report lists all the subcontractors on the contract.
Summary By Funding Report	The Summary by Funding Report lists the current fund amount for funds and fund packages associated with each project in a contract. The report also lists information about each approved payment estimate for the contract.
Weekly Report of Time Charges	The Weekly Report of Time Charges lists the number of hours charged for the selected contract time as recorded on DWRs during the specified week. The report lists the number of hours worked each day for the contract time, the reason for any delays, diary adjustments to the contract time, and which contractors were on site each day.

5.3 Generate Report

To generate any report in the system, follow these steps:

 **Note:** Certain reports may not be accessible based on the user's role.

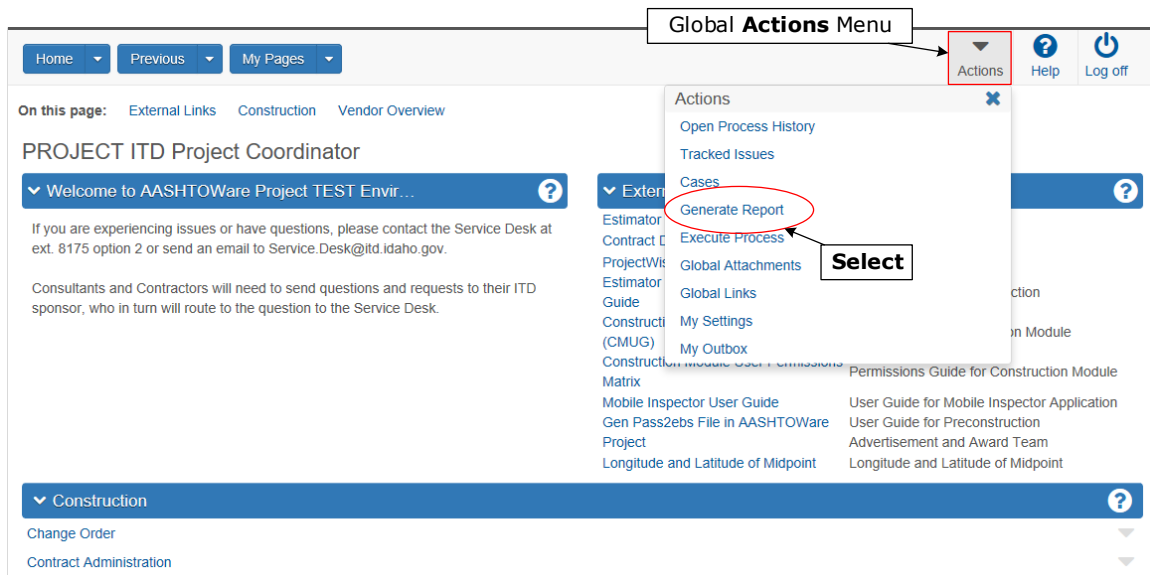


Figure 36 - AASHTOWare Project Homepage

1. On the *AASHTOWare Project* homepage, select **Generate Report** from the **Global Actions** menu.

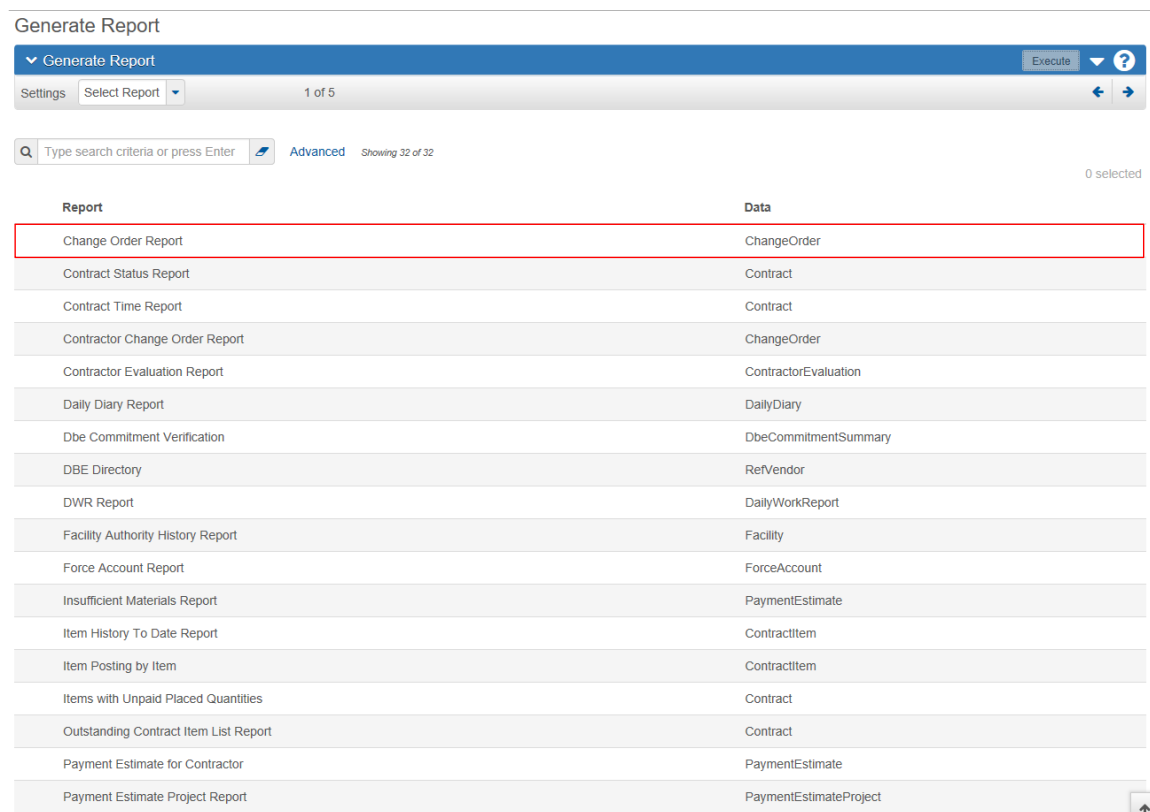


Figure 37 - Generate Report Page (Select Report)

- On the *Generate Report* page, select the **Report** from the list. (Upon clicking the report name, the system proceeds to the next page.)

Figure 38 - Generate Report Page (Enter Contract Number)

- Enter **Contract Number** in the Quick Find search box.

Contract Number	Item Description	Item ID	Change Order Description	Date	Status
2001	I-84, SH-50 TO MACHINE	0001	change order test of chang	06/27/2018	Approved
2001	I-84, SH-50 TO MACHINE	0002	This is a test Change Orde	05/21/2018	Void
2001	I-84, SH-50 TO MACHINE	0003	Decrease Item Quantity	08/02/2018	Approved
✓ 2001	I-84, SH-50 TO MACHINE	0004	Extra WorkYou are orderec	02/11/2019	Approved
2001	I-84, SH-50 TO MACHINE	0005	Change order number 5 At	01/31/2019	Draft
2001	I-84, SH-50 TO MACHINE	0006	Change in PlansBackgrou	02/11/2019	Approved
2001	I-84, SH-50 TO MACHINE	0007	Excessive Snow	02/12/2019	Draft
2001	I-84, SH-50 TO MACHINE	0008	You are ordered to perform	02/28/2019	Draft

Figure 39 - Generate Report Page

- Select the appropriate report from the list. (You will know when you have selected the correct report, when a green check mark ✓ is displayed to the left.)
- Click the **Execute** button to generate the report.

5.4 Scheduling a Report

By scheduling a report, the user can set the system to automatically run the report on a daily, weekly, monthly, or a one-time basis. The user can create a schedule for any report in the system.

Follow these steps to schedule a report:

1. Select **Generate Report** from the **Actions** menu on the Menu Bar.
2. In the list of reports, select the report you want to schedule. Enter information as needed on the Select Report, Select Data, Set Parameters, and Output Options pages.
3. Select **Schedule Report** from the **Settings** menu on the component sub header.
4. Select the **Enable Scheduling** check box.
5. Click the down arrow in the Schedule Frequency field, and select how often you want the report to run.
6. Enter field values as needed for the chosen frequency.
7. If the user wants the report to run more than once a day, select the **Repeat Task Every** check box, type a value, and select an increment of **Minutes** or **Hours**.
8. By default, the report generation process can run for 30 minutes, after which the system automatically stops the report. If the user wants to set a longer maximum duration the report is allowed to run, select the **Stop if runs longer than** check box, and select the amount of time from the drop-down menu.



Note: If the user is working with a large data set or including a large number of records in the report, longer processing time might be required. To prevent the report generation process from timing out, be sure to select the **Stop if runs longer than** check box and select a longer processing time from the drop-down menu.

9. If the user wants to set a date on which the recurring scheduled report will stop running, select the **Expire** check box. In the **End Date** field, type (or use the calendar feature to select) the date on which the user wants the report to stop. If applicable, click in the **End Time** field, and type a time of day the user wants the report to stop running, and then select **AM** or **PM**.
10. Click the **Schedule** button to save the new report schedule.

The following table describes frequencies and associated field values:

Frequency	Field	Value
Once	Start Time	Type the time of day you want the report to run and select AM or PM.
	Run on Date	Type (or use the calendar feature to select) the date on which you want the report to run.
Daily	Start Date	Type (or use the calendar feature to select) the date on which you want the report to run for the first time.
	Start Time	Type the time of day you want the report to run and select AM or PM.

Frequency	Field	Value
	Run every __ day(s)	Type the number of days you want used as an interval between report runs. If you want the report to run every day, type 1 .
Weekly	Start Date	Type (or use the calendar feature to select) the date on which you want the report to run for the first time.
	Start Time	Type the time of day you want the report to run and select AM or PM.
	Run every __ week(s) on	Type the number of weeks you want used as an interval between report runs (if you want the report to run every week, type 1) and select the check box for the day of the week on which you want the report to run (for example, Run every 2 weeks on Friday).
Monthly	Start Date	Type (or use the calendar feature to select) the date on which you want the report to run for the first time.
	Start Time	Type the time of day you want the report to run and select AM or PM.
	Day of the month	<p>Select one of the following:</p> <ul style="list-style-type: none"> Type the exact date of each month you want the report to run (for example, to run the report on the 15th of each month, type 15). Select a week of the month and day of the week on which you want the report to run.

6. Appendices

6.1 Glossary of Terms

Term	Definition
<i>AASHTO</i>	The American Association of State Highway and Transportation Officials (AASHTO) is a standards setting body which publishes specifications, test protocols, and guidelines which are used in highway design and construction throughout the United States.
<i>AASHTOWare</i>	AASHTOWare is a powerful enterprise software suite which assists US Department of Transportation (DOT) to manage information throughout the entire contract and construction cycle from cost estimation to proposal preparation, letting bids, construction and material management, and data collection.
<i>Change Order</i>	Change Order allows a party of interest to legally change a signed contract. The change order process includes creating, approving, and tracking contract changes. Typical circumstances where a change order must be processed include: <ul style="list-style-type: none">• New items of work need to be added to a contract.• A time extension is needed to complete the work on a contract.
<i>Contract</i>	A contract is the written agreement between the transportation agency and the successful bidder that sets forth the obligations of both parties, including performance of work, furnishing of labor and materials, and basis of payment.
<i>Contract Claim</i>	Disputes related to a construction project occasionally occur between the transportation agency and its contractors. When a dispute leads to a legal claim being made, the agency must track the claim until it is resolved.
<i>Contract Project</i>	A contract inherits all of the projects that were part of the proposal from which it was transitioned. At the contract stage, these are called contract projects. As the work on a contract progresses, the agency sometimes determines that additional work not originally estimated in the proposal, but which logically would be part of the current contract must be performed. In these circumstances, a new contract project is added to the contract to manage the new work.
<i>Contract Times</i>	Contract times are records of time-related information that are important to the contract. There are five types of contract time records: Available Time, Calendar Time, Completion Date, Informational, and Recurring. Examples of contract times include the notice to proceed date (informational), the number of available days for contract completion (available time), and the schedule for inspections (recurring).
<i>Daily Diary</i>	A Daily Diary is a collection of all the authorized Daily Work Reports (DWRs) submitted on one day by all inspectors working on a contract. The Project Coordinator or Resident Engineer usually submits one Daily Diary per day per contract. In the Daily Diary, the Resident Engineer authorizes the DWRs and records the time charge information for the day.
<i>Daily Work Report</i>	Daily Work Reports (DWRs) are created to document work that is performed daily on a contract. The information recorded in a DWR is based on actual activity, not planned

	activity, and is essential for the administration of a contract. Daily information is recorded about the weather, the personnel who worked at the construction site, the hours worked, and the equipment used. This data is collected in the field by field inspectors working on the contract.
<i>District</i>	A district is a division of territory within a state marked off for administrative purposes.
<i>Pay Estimate</i>	Pay estimate is the dollar amount paid to the contractor based on the estimated quantity of work completed to date.