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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:
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.
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>
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<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>
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<td>(208) 334-8377</td>
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<td>(208) 886-7812</td>
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<tr>
<td></td>
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<td><a href="mailto:Steve.Davis@itd.idaho.gov">Steve.Davis@itd.idaho.gov</a></td>
<td>(208) 239-3350</td>
</tr>
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<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>
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<td>(208) 745-5637</td>
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<td></td>
<td>Gregg Bowman</td>
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<td>(208) 745-5321</td>
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<td>John Cleveland</td>
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<td>(208) 745-5645</td>
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<td>(208) 334-8518</td>
</tr>
<tr>
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<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 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.

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

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 logon page.

Figure 2 - AASHTOWare Project Log Off
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.

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

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 pertains 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:

<table>
<thead>
<tr>
<th>Icons</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>🆔</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>🔍</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 Enter to show all values.</td>
</tr>
<tr>
<td>🔍</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>🔺</td>
<td>A red asterisk indicates a field where data entry is required.</td>
</tr>
<tr>
<td>📜</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>❌</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>🗑️</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 clicks the Mark for Deletion button, the button changes to an Undo button. The row is removed only when the user saves the changes.</td>
</tr>
<tr>
<td>👽</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>🤔</td>
<td>The help icon appears on Help buttons that the user can click to display the online Help system.</td>
</tr>
<tr>
<td>📅</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. 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:

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

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.
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:

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)
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:

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**.

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:

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.
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:

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.)
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:

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**.

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 Page (Contractors Tab)](image)

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:

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.

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:

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:

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:

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.

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

4.1 Overview of Change Order Concurrence

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.

![Select an Appropriate Role.](image)

*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](image)

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

![Figure 28 - Change Order Overview Page](image)

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.

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

5. On the *Contract Change Order Summary* page, select **Change Order Report** from the component **Actions** menu.
6. 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.

7. After reviewing the report, go back to the AASHTOWare application to provide decision.
8. On the Generate Report page, click the Previous button to go back to the Change Order Summary page.

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

Note: The user must enter comments in order to give their concurrence or non-concurrence on the change order.
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.]

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:

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Order Report</td>
<td>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.</td>
</tr>
<tr>
<td>Contractor Change Order Report</td>
<td>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.</td>
</tr>
<tr>
<td>Contract Status Report</td>
<td>This report summarizes all contract activities throughout the contract lifecycle.</td>
</tr>
<tr>
<td>Contract Time Report</td>
<td>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.</td>
</tr>
<tr>
<td>Daily Diary Report</td>
<td>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.</td>
</tr>
<tr>
<td>DWR Report</td>
<td>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.</td>
</tr>
<tr>
<td>ITD Diary Time Accounting Report (ITD Custom Report)</td>
<td>This is ITD custom time accounting report that contains contract time details and description of each day the time is charged or not charged.</td>
</tr>
<tr>
<td>ITD Payment Estimate for Contractor Report (ITD Custom Report)</td>
<td>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.</td>
</tr>
<tr>
<td>Item History to Date Report</td>
<td>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</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Item Posting by Item Report</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stockpile Summary Report</td>
<td>The Stockpile Summary Report lists all the stockpile transactions made on the contract.</td>
</tr>
<tr>
<td>Subcontractor Listings</td>
<td>The Subcontractor Listings report lists all the subcontractors on the contract.</td>
</tr>
<tr>
<td>Summary By Funding Report</td>
<td>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.</td>
</tr>
<tr>
<td>Weekly Report of Time Charges</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.]

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

![Figure 36 - AASHTOWare Project Homepage]

![Figure 37 - Generate Report Page (Select Report)]
2. On the Generate Report page, select the Report from the list. (Upon clicking the report name, the system proceeds to the next page.)

![Generate Report Page (Enter Contract Number)](image)

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

![Generate Report Page](image)

**Note:** When data is selected on a page, the system proceeds to a different page. The system stopped at this page because no further information is required to generate this report. However, some other reports may require additional information to generate the report. You can manually change the pages by clicking the **Settings** dropdown menu or clicking the arrows.

![Generate Report Page](image)

4. 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.)

5. 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:

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once</td>
<td>Start Time</td>
<td>Type the time of day you want the report to run and select AM or PM.</td>
</tr>
<tr>
<td></td>
<td>Run on Date</td>
<td>Type (or use the calendar feature to select) the date on which you want the report to run.</td>
</tr>
<tr>
<td>Daily</td>
<td>Start Date</td>
<td>Type (or use the calendar feature to select) the date on which you want the report to run for the first time.</td>
</tr>
<tr>
<td></td>
<td>Start Time</td>
<td>Type the time of day you want the report to run and select AM or PM.</td>
</tr>
<tr>
<td>Frequency</td>
<td>Field</td>
<td>Value</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Run every __ day(s)</td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Weekly</td>
<td>Start Date</td>
<td>Type (or use the calendar feature to select) the date on which you want the report to run for the first time.</td>
</tr>
<tr>
<td></td>
<td>Start Time</td>
<td>Type the time of day you want the report to run and select AM or PM.</td>
</tr>
<tr>
<td></td>
<td>Run every __ week(s) on</td>
<td>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).</td>
</tr>
<tr>
<td>Monthly</td>
<td>Start Date</td>
<td>Type (or use the calendar feature to select) the date on which you want the report to run for the first time.</td>
</tr>
<tr>
<td></td>
<td>Start Time</td>
<td>Type the time of day you want the report to run and select AM or PM.</td>
</tr>
<tr>
<td></td>
<td>Day of the month</td>
<td>Select one of the following:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 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).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Select a week of the month and day of the week on which you want the report to run.</td>
</tr>
</tbody>
</table>
# 6. Appendices

## 6.1 Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AASHTO</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>AASHTOWare</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>
| **Change Order**   | 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:  
  - New items of work need to be added to a contract.  
  - A time extension is needed to complete the work on a contract. |
| **Contract**       | 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. |
| **Contract Claim** | 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. |
| **Contract Project** | 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. |
| **Contract Times** | 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). |
| **Daily Diary**    | 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. |
| **Daily Work Report** | 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.

<table>
<thead>
<tr>
<th>District</th>
<th>A district is a division of territory within a state marked off for administrative purposes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Estimate</td>
<td>Pay estimate is the dollar amount paid to the contractor based on the estimated quantity of work completed to date.</td>
</tr>
</tbody>
</table>