





AASHTOWare Project
Construction and Materials
Engineering Project
Manager/
Field Office Person Role
Training Manual





EPM

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Updated 5/13/19

1.  **What's new for the EPM/FOP role?**

2. **Adding Equipment, Personnel and Supervisors to Contractors on a contract**

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Construction>Contract Vendor Assets

1. In the search box, enter your contract number.
2. Click on the row action button for the first Contractor and select Open equipment

Contract Vendor Asset Overview

Contract Vendor Assets

07817a Advanced Showing 3 of 3

Contract ID	Vendor Short Name	Equipment	Personnel	Supervisors
07817A	SK CONSTRUCTION, INC.	3	3	1
07817A	INDUSTRIAL BUILDERS INC	3	3	1
07817A	REEVERTS FENCING LLC	5	3	3

0 changed

3. Click on the drop down next to the New button and choose Select Vendor Equipment.

Home Previous My Pages

Overview

Contract Vendor Asset Summary

Contract: 07817A - MILK RIVER - NORTH

Vendor: 2096 - SK CONSTRUCTION, INC.

Equipment

Personnel

Supervisors

Open Actions Menu

New

Yes

Actions

Select Vendor Equipment...

Caterpillar

4. Enter an Effective Date (usually today's date)
5. In the Status box, choose Active.



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****Entering this information before choosing the equipment will fill in the effective date and status for all of the equipment you choose in the next steps – otherwise you must choose the date and status for each row**

6. In the search box, hit enter
7. Choose the equipment that will be used by clicking on the row listing the equipment type or for multiples hold down your Control key and click on each type you wish to add . You can also select All (in blue under the search box) to add all generic equipment.
8. Click on Add to Contract Vendor.
9. Click on the Personnel tab on the left side.
10. Click on the drop down next to the New button and choose Select Vendor Personnel.
11. Enter an Effective Date (usually today's date).
12. In the Status box, choose Active.
13. In the search box, hit enter
14. Choose the personnel that will be used by clicking on the row listing the personnel type or for multiples hold down your Control key and click on each type you wish to add . You can also select All (in blue under the search box) to add all generic personnel.
15. Click on Add to Contract Vendor.

**** If you would like to add custom Equipment or Personnel, you can do so by clicking New on the right side of the tab and filling in the information. The custom entries will only show on your contract forr this contractor. You can also customize the generic equipment by typing in an equipment ID (up to 50 characters – like 2011 GMC for pickup)**

16. Click on the Supervisors tab on the left side.
17. Click on the drop down next to the New button and choose Select Vendor Staff.
18. Enter an Effective Date (usually today's date).
19. In the Status box, choose Active.
20. In the search box, hit enter
21. Choose the staff by clicking on the row listing the staff and holding down your Control key or select All (in blue under the search box).
22. Click on Add to Contract Vendor.
23. Click on the Overview quick link near the top of the page.
24. Click on the row action for the next contractor and add the equipment, personnel and staff for each contractor by repeating steps 2-21.

****The subcontracts must be added in Helena before they will show up in the Contract Vendor Asset window**



3. Run the Contract Material Acceptance Report and save the report

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

25. Click on the **Global Action** button

26. Select **Generate Report**

27. In the **Search** field enter *material*

28. Click on the **Contract Material Acceptance (Checklist)** row

29. In the **Search** field enter *07817X*

30. Click on **select all**

31. Click the **Execute** button

32. Verify that the report was generated

33. Select **File**

34. Select **Save As...**

35. Browse to C:\DGN

36. In the File name field enter *07817X_SamplingTestingReport.pdf*

37. Click **Save**



4. Add materials to a Project Specific material set

Login

Username: Uxxxx

Password: xxxxxxxx

Role: EPM

Navigation

Construction > Contract Progress > [07817X](#)

1. Click on the Contract Materials and Acceptance Actions quick link
2. Click on the **Materials** Tab
3. In the **Search** field enter [proj](#)
4. Click on the **Row Actions** button of the **0010 - MISCELLANEOUS WORK / Project Specific Material Set** and select **Add Material**.
5. In the **Material** field enter [lime](#)
6. Select [713.02.00.01 Hydrated Lime](#)
7. In the **Conversion Factor** field enter [1](#)
8. Click **Save**
9. Verify that the number changes to [1](#) in the **Materials** count column
10. Click on the **Acceptance Actions** Tab
11. Locate the **0010 - MISCELLANEOUS WORK** item and verify there is a row for [713.02.00.01 – Hydrated Lime](#)
12. Expand the row by clicking on the > symbol in the top left corner
13. Verify that an **Acceptance Action** for [PMS Additive Acceptance](#) was automatically added
14. Click on the **PMS Additive Acceptance** link
15. Verify that there are 2 options for acceptance, [Hydrated Lime Testing & Cert](#) and [QPL Verification](#)
16. Expand the **Hydrated Lime Testing & Cert** option by clicking on the > symbol in the top left corner
17. Verify that there are 3 acceptance actions for [Hydrated Lime Sieve Analysis](#) via a Sample Record, [Hydrated Lime Chemical Properties](#) via a Sample Record and [Certification Review](#) via a Daily Work Report
18. Expand the **QPL Verification** option by clicking on the > symbol in the top left corner
19. Verify that there is 1 acceptance action for [QPL Verification](#) via a Daily Work Report
20. Click on the Contract Materials and Acceptance Actions quick link



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21. Click on the **Materials** Tab
22. Click on the **Row Actions** button of the **0010 - MISCELLANEOUS WORK / Project Specific** Material Set and select **Add Material**.
23. In the **Material** field enter *deck*
24. Select *551.03.02.06 – Concrete-Class Deck*
25. In the **Conversion Factor** field enter *1*
26. Click **Save**
27. Verify that the number changes to *2* in the **Materials** count column
28. Click on the **Acceptance Actions** Tab
29. Locate the **MISCELLANEOUS WORK** item and verify there is a row for *551.03.02.06 – Class Deck Concrete*
30. Expand the row by clicking on the > symbol in the top left corner
31. Verify that 4 Acceptance Actions were automatically added for: *Concrete Properties, Concrete Strength Tests-7, Concrete Strength Tests-28* and *Concrete Permeability*
32. Click on the **Concrete Properties** link
33. Verify that there is 1 option for acceptance, *Concrete Properties*
34. Expand the **Concrete Properties** option name by clicking on the > symbol in the top left corner
35. Verify that there is 1 acceptance action for *Standard Specification 551.03.8 Air Content, Slump, and W/CM* via a Sample Record with an **Action Rate** of *1*, an **Action Frequency** of *24* and an **Frequency Type** of *Quantity*
36. Click on the **Contract Materials and Acceptance Actions** quick link



5. Create a diary

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [07817X](#)

1. Click on the Diaries tab
2. Click **Add**
3. Change the **Diary Date** to [03/12/2018](#)
4. Verify the **Author** is your personID
5. Click **Save**
6. In the **Weather AM** select [Cloudy – Cloudy](#)
7. In the **Weather PM** select [PartlyCloudy – Partly Cloudy](#)
8. Enter [42](#) in the **Low Temperature**
9. Enter [55](#) in the **High Temperature**
10. Click **Save**



6. Charge a working day on a diary

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Diary from previous exercise

1. Click on the **Contract Times** tab
2. Expand the **Time ID** *00 AT GRADE, GRVL, PMS AND STRUCTURE*
3. In the **Original Time Charged** field, enter *1*
4. Click **Save**

7. Review and approve pending DWRs

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Home > Daily Diary > *07817X*

1. Click on Diary Date *03/12/2018*
2. Click the **DWRs** tab
3. In the search box, click **enter**
4. Verify the status on one of the two DWRs is Pending Approval and the other is Draft
5. For the Pending Approval DWR, click on the **row action** button and select *Approve*
6. Verify the status on the Pending Approval DWR changed to Approved



8. Run the Weekly Report of Time Charges

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Continuation of previous test case

1. Click on the **Contract Progress** quick link
2. Click on the **Weekly Report Of Time Charges** tab
3. Click **New**
4. In the **Week Ending** calendar popup, select *3/10/2018*
5. Click in the **Contract Time** field and hit enter
6. Select *00 AT GRADE, GRVL, PMS AND STRUCTURE*
7. Click **Save**
8. From the component action button, select *Weekly Report of Time Charges*
9. Enter the **Week Ending** date of *03/10/2018*
10. Click **Execute**
11. Verify there are four Charge days



9. Approve the concrete properties test on a deck concrete sample

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Materials Worksheets > Review Tests

1. In the search box, enter **00X** (where X is your assigned letter)
2. Click the box to the left of the Reportable column for the test Concrete Properties (a green check mark will appear)
3. On the very right, click the Row Action button
4. Click **Tasks**
5. Click **Mark Test Review By Level 2**
6. Verify the test disappears from the list
7. Click the **Home** button



10. Authorize a sample record

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Materials Worksheets > Review Samples

1. In the search box, enter *00X* (where X is your assigned letter)
2. On any of the tests, double-click on the **Sample Status** field
3. Change the sample status to *Complete*

Note: It is recommended that the sample record remain in the Complete status until the contract is close to Finalization.

4. Click **Save**
5. Verify that all tests changed to sample status Complete
6. On the very right, on any of the tests, click the **Row Action** button
7. Click **Tasks**
8. Click **Authorize**
9. Verify all tests disappeared
10. Click the **Sample Records** Quick Link
11. In the search box, enter *00X* (where X is your assigned letter)
12. Click on the **Sample ID** link
13. Scroll down and verify the Authorized By and Authorized Date fields auto-populated



11. Add a Construction Stockpile

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Construction>Contract Progress>Contract [07218\[x\]](#)>Construction Stockpile

1. From the component action menu, select **Add**.
2. In the Item field, type *plant*
3. Select [0130 401020065 - PLANT MIX SURF GR S-3/8 IN.](#)
4. Select **Save**.
5. Verify that the Description field is auto-populated with the description of the item
6. In the **Comments** field enter *Material stored at Moon Creek Pit.*
7. In the **Invoice Number** field enter *Letter*.
8. In **Invoice Date** field enter *05-14-18*
9. In the **Invoice Quantity** field enter *10000*.
10. In the **Invoice Description field** enter *See letter in share drive requesting payment.*
11. From the drop down list under **Project Item Distribution**, select [0130 – 8991039000J01-10-2018 \[x\] – 0001](#).
12. In the Constr Stockpile Amt field enter *10,000*.
13. Select **Save**.



12. Generate a Progress Estimate

Login

Username: Uxxxx

Password: xxxxxxxx

Role: EPM

Navigation

Dash Board



The Mob-user DWR needs to be approved before the estimate is run

1. Click on the **Contract Progress Component**
2. Select Contract [07817\[x\]](#)
3. Click on the **Payment Estimates** tab.
4. Click on the **Add Payment Estimate** button.
5. Select Period End Date of [01-25-2018](#)
6. Click the **Add Payment Estimate** button.
7. Verify the process started successfully by the message box at top of screen
8. Click on the **Process History Overview** quick link at the top of the page.
9. Look for a process titled **AddPaymentEstimate** with the current date and time.
Note: You have to wait until the process is completed.
10. Verify a Success of Yes. Click on the **AddPaymentEstimate.log** link.
Note: When clicking on the **AddPaymentEstimate.log** a popup will open at the bottom of the screen. Click on open to view the log file.
11. Verify there were no errors in the log file.
Note: If an error is encountered follow instructions in the .log file.
12. From the Previous link dropdown, select **Contract Progress Summary**.
13. Click on the **Payment Estimates** tab.
14. Verify that a Draft Payment Estimate was created (hit enter in the search box).



13. Run Estimate Report

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Dash Board>External Links>Jasper Reports

1. Right click on the Jasper Reports link and choose Open in new tab. (This allows you to maximize the window)
2. Enter Windows Login and Password
3. Click on **View** > *Repository*
4. Under the **Folders** section on the left side, expand MDT > Protected > AASHTOWare
5. Click on **Construction Payment Estimate Report**
6. Select the **Contract** *07817[X]* from the dropdown list
7. Select **Estimate** *3* from the dropdown list
8. Click **Apply**
9. Review the report



14. Add a Positive Fuel Price Adjustment

Login

Username: Uxxxxx

Password: xxxxxx

Role: EPM

Navigation

Contract Progress>Contract [07817\[x\]](#)

1. Go to the Payment Estimates tab
2. Select Estimate Number **0003**.
3. Select **Contract Adjustments Tab**
4. Select **New** under User Generated Contract Adjustment.
5. Under **Type** Select [Other Contract Adjustment](#).
6. Under **Other Contract Adjustment Type** Select [Fuel Price – Fuel Price Adjustment](#).
7. Enter [540.00](#) in the **Amount** Field.
8. Enter comment of [See Fuel Price Adjustment Spreadsheet in Share Drive](#).
9. Select **Save**



15. Override an Estimate Exception

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Dashboard>Contract Progress> Contract [07817\[x\]](#)>Payment Estimates

1. Click on estimate number [0003](#).
2. Select **Exceptions**.
3. Expand Exception ID 1
4. From the Status drop down list select [Overridden](#).
5. Under the **Type** drop down list [EstException – Exception Remark](#)
6. Under the Remark field enter [Change Order in progress](#).
7. Select Save.
8. Run the Jasper report Construction Payment Estimates
External Links>Jasper
Reports>View>Repository>MDT>Protected>Construction>Training
9. Choose your contract 07817(x) and estimate 003. Apply
10. On page 10 of the estimate, under Line Item Adjustments This Estimate, Verify the **Overrun Deduct and Overrun deduct Override** balance each other out.



Materials exceptions and overruns – if you do not override the exception there will be a negative dollar amount on the estimate. All Payroll exceptions must be overridden or resolved. An e-mail goes out to the Labor Compliance Specialist for all payroll exceptions.



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16. FOP Approval

Login

Username: Uxxxx Password: xxxxx Role: FOP

Navigation

Dash Board>Construction>Payment Estimates> 07817[x]

1. Search on **Contract ID** or select **Show first 10**.
2. Click on Estimate Number **0003** for Contract ID 07817[x].
3. From the **Component Actions** Menu select **Submit for Approval**.
4. From the **Component Actions** Menu select **Approve**.



17. Create a change order for a non-federal oversight (non-PoDI) contract and create a standard explanation.

Login

Username: Uxxxx

Password: xxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [07218\[x\]](#)

1. Click on the Change Orders tab
2. Click the **Add** button
3. Verify that **Change Order Date** defaults to today's date
4. Verify that the **Author** is your name
5. In the **Description** field, enter *Additional excavation of soft spots*
6. Under the **Approval Rules**, select *CO – Change Order*
7. Select the **Reason** *EW – Extra Work*
8. Click **Save**
9. Verify that the **PoDI (FHWA)** says No
10. Verify that the **Entered By** and **Entered Date** fields are populated
11. In the **Seq Nbr** field under Change Order Explanation, enter *1*
12. In the **Standard Explanation Name** field, type *ex* and select *Unsuitable Material*
13. Verify that **Standard Explanation Description** populated with "Remove and dispose of unsuitable material..."
14. Click **Save**



18. On a non-PoDI contract, add an item increase and a new contract item totaling more than \$50,000 and verify the approval groups.

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Change order from previous test case for [07218\[x\]](#) “Additional excavation of soft spots”

1. Click the **Increase/Decrease Items** tab
2. Click the **Select Items** button
3. In the search field, type [dig](#)
4. Select item [203020278 - EXCAVATION-DIGOUTS](#)
5. Click **Add to Change Order**
6. In the **Quantity** field, enter [1,022](#)
7. Click **Save**
8. Click the **New Items** tab
9. Under the Contract Items section, click the **Select Contract Item** button
10. In the Contract Item search field, type [dig](#)
11. Select item [0040 203020278 - EXCAVATION-DIGOUTS](#)
12. Select project [8902353000\[x\] SF - 149 ROUNDUP SAFETY IMPRV Category 0001](#)
13. Click **Add to Change Order**
14. In the **Project Item Line Number** field, change the number to [902010](#)
15. In the **Contract Item Line Number** field, change the number to [902010](#)
16. In the **Quantity** field, enter [278](#)
17. Click **Save**
18. Verify the change order **Amount** at the top is \$53,300.00
19. Click on the **Review Tracking** tab
20. Click **Select Reviewers**
21. Change the custom filter from System Default to [5-Billings CO](#)
22. Click [All](#)
23. Click **Save**
24. Verify that a warning message appears indicating that the New Contract Item has modified the Current Quantity



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25. Close the warning box
26. Verify the **Status** changed to Pending Review
27. Click the **Home** button
28. Click the **Approval Tracking** tab
29. Click the down arrow and select **Assign Default Approval Groups**
30. Verify the following roles are added:
 - 1 – Contractor, 2 – EPM, 3 – Construction Reviewer, 4 – District Construction Engineer, 5 – District Administrator, 6 – Construction Administration Engineer



19. Submit a change order for approval and review the change order report.

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Change order from previous test case for [07218\[x\]](#) "Additional excavation of soft spots"

1. Under the **Component Action** button, select [Submit for Approval](#)
2. Verify the warning message "Change Order New Item has modified the Current Quantity of Contract Item" appears
3. Under the **Component Action** button, select [MDTChangeOrderReport](#)
4. Click **Execute**
5. Verify the **Net CO Amount** is \$53,300.00
6. Verify both bid items are on the report
7. Close the window
8. Click the **Previous** button



20. **EXAMPLE** Other Examples of EPM/FOP items

21. Add a non-default recurring time to contract.

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Construction > Contract Administration > Contract [07817\[x\]](#) > Contract Times Tab > Recurring

1. Go to the **Recurring** row (collapse the Informational and Site Times)
2. Click on the **Select RecurringTimes** button
3. In the search box, type *Strip*
4. Select the **Time ID** *STRIPDEADLINE* record
5. Click the **Add to Contract Times** button
6. Click **Save**
7. Expand the Recurring row
8. Click on *STRIPDEADLINE*
9. In the **Effective Date** field, choose today's date.
10. In the **Status** field, choose *Active*.
11. Click on the **Recurring Time Occurrences** tab.
12. In the Planned Occurrence field, enter a future date
13. Click **Save**



22. Add material to a material set and additional options for material acceptance

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

1. Click on the **Materials** Tab
2. In the **Search** field enter *opt*
3. Click on the **Row Actions** button of the **0570 - Curb and Gutter-Conc (609010200)/Class General-Optimized** Material Set and select **Add Material**
4. In the **Material** field enter *crush*
5. Select *701.02.04.02 Crushed Base Coarse Grade 6A*
6. In the **Conversion Factor** field enter *1*
7. Click **Save**
8. Verify that the number changes to *7* in the **Materials** count column
9. Click on the **Acceptance Actions** Tab
10. In the **Search** field enter *curb and*
11. Locate the **Curb and Gutter- Conc** item on **Class General-Optimized** Material Set and verify there is a row for *701.02.04.02 – Crushed Base Coarse Grade 6A*
12. Expand the row by clicking on the > symbol next to the Project number
13. Verify that 2 **Acceptance Actions** were automatically added for *Compaction Testing* and *Comparison Testing*
14. Click on *Compaction Testing*
15. Expand the **Compaction Testing** Option by clicking on the > symbol next to the Option Name
16. Verify there is a *Proctor - MT 210 / MT 230* test via a Sample Record
17. Click on the **Row Action** menu on the far right of the **Option Description**
18. Click *Select Action Relationship*
19. In the **Search** field enter *sieve*
20. Click the *MT 202 - Sieve Analysis* test and select **Add to Option**
21. Click > symbol to expand the Sieve Analysis Option
22. In the **Action Rate** field enter *1*
23. In the **Frequency Type** dropdown list select *Contract*



24. Click **Save**

23. Create a diary adjustment on a working day site time

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [07817X](#)

1. Go to the Weekly Report of Time Charges tab
2. Click [Show first 10](#) (if not expanded)
3. From the row action for **Week Ending 12/09/2017** for **Contract Time 00 AT-GRADE, GRVL, PMS AND STRUCTURE**, under Reports, select [Weekly Report of Time Charges](#)
4. Click **Execute**
5. Verify 12/06/2017 is a Charge day
6. Close the window
7. Click the **Previous** button
8. Go to the **Diary Adjustments** tab
9. Click **Select Diary Contract Time Charges**
10. In the search box, enter [12/06/17](#)
11. Select the **Time ID 00 AT**
12. Click **Add to Diary Adjustments**
13. Click the > to expand the section
14. In the **Current Time Charge** field, enter [0](#)
15. In the **Comments** field, enter [Winter suspension](#)
16. Click **Save**
17. Go to the **Weekly Report of Time Charges** tab
18. From the row action for **Week Ending 12/09/2017** for **Contract Time 00 AT**, under Reports, select [Weekly Report of Time Charges](#)
19. Click **Execute**
20. Verify under the Diary Adjustments This Week section that 12/06/2017 is a No Charge day
21. Close the window



24. Charge a calendar day on a milestone and a no-charge day on the main site time

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Home > Construction > Contract Progress > Contract [07817X](#) > Diaries tab

1. Click Show first 10
2. Click the Diary Date [03/09/2018](#)
3. Click the **Contract Times** tab
4. Click on the [Milestone - Calendar Day](#) record to expand it
5. In the **Original Time Charged** field, enter [1](#)
6. Click **Save**
7. Click on the row for the **Time ID** [00 ATGRADE, GRVL, PMS AND STRUCTURE](#) to expand it
8. In the **Original Time Charged** field, enter [0](#)
9. In the **Credit Reason** dropdown, select [OTHER – Other – See Comments](#)
10. In the **Comments** field, enter [Too much rain to work](#)
11. Click **Save**



25. Create a meeting record

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [07817\[x\]](#)

1. Click on the Contract Documentation quick link.
2. Click on the Meetings tab.
3. Click the **Add** button
4. In the **Meeting Title** enter *Pre-Construction Meeting*
5. In the **Meeting Type** select *PRECON-Preconstruction Meeting*
6. In the **Meeting Date** select *03/02/18*
7. In the **Remarks Type** select *Meeting Remark – Remark for Meeting*
8. In the **Remarks** field type *Railroad has been invited.*
9. Click **Save**

Modify a Remark

10. In the **Remarks Field** Change Railroad to *BNSF*
11. Click **Save**

Delete a Remark

12. Click on the **Trash Can** next to the Remark
13. Click **Save**



26. Add a Permit to a contract (Permit that MDT sends to the permitting agency)

Login

Username: U

Password:

Role: EPM

Navigation

Construction > Contract Administration > Contract [07817\[x\]](#)>Permits

1. Click on the Permits tab
2. Click the **New** button
3. In the **Permit Type** select [CWA_404/SEC_10-CWA 404/Section 10 Permit \(temporary facilities\)](#)
4. In the **Submit Date** select [01/04/18](#)
5. In the **Remarks** type [received Contractors 404 and sent it into the Army Corp of Engineers](#)
6. Click **Save**
7. In the **Obtained Date** select [02/14/18](#)
8. In the **Permit ID** tab type [NWO-2018-01900-MTB](#)
9. Click **Save**

27. Create a plan discrepancy specifying a contract project.

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [07817\[x\]](#) > Contract Documentation > Plan Discrepancies Tab

1. Click the **Add** button
2. In the **Contract Project ID** field hit **Enter** and select Contract Project ID [5157010000\[x\]](#)
3. In the **Description** field enter [Overran special borrow](#)
4. In the **Type** dropdown select [Field Conditions](#)
5. In the **Remark** field enter [Pavement blew out at Station 52+25](#)
6. Click **Save**



28. Create a DWR for Steel Certification Acceptance

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Construction > Daily Work Reports

1. Click the Component Action button and **Select Contract to Add DWR**.
2. Check the Contract ID [07817\[X\] Milk River - North](#) row.
3. Click on the **Create DWR on Contract** button.
4. Verify that the DWR Date and Inspector fields are auto-populated with the current date and user.
5. Click **Save**.
6. Select **Contractors** Tab
7. Click **Select Contractors** button
8. Click on Vendor ID [7122 REEVERTS FENCING LLC](#)
9. Click on **Add to DWR Contractors** button
10. Click **Save**
11. Click on **Work Items** Tab
12. Click **Select Items** button
13. Type [single](#) in the Search field
14. Select Project Line Item [0490 – 607100362-FARM FENCE-PANEL/SINGLE FM](#) from the list
15. Click the **Save** button
16. Click on the Item Row Action button and select **New Posting**
17. Select [7122 REEVERTS FENCING LLC](#) (Sub) in the **Contractor** field
18. In the **Station From** field type [25+00](#)
19. In the **Station To** field type [40+00](#)
20. In the **Location/Description** field type [Steel certification review](#).
21. In the **Material Set** field, verify that [Farm Fence Panel – Single FM](#) is auto-populated
22. Click **Save**.
23. Click on the **Acceptance Records** Tab
24. Expand the Farm Fence – Panel/Single FM by clicking on the > arrow
25. Expand the [712.02.00.01 - Fence Wire](#) section by clicking on the > arrow.
26. In the **Source ID** field hit enter and select [Oklahoma Steel & Wire](#) from the list
27. From **Field Inspection Value** dropdown list select [STL – Steel Cert Reviewed](#)
28. From the **Certification comparison to MDT Specs** dropdown list select [Meets Specs](#)
29. From the **Form 406** dropdown list select [Meets Specs](#)



30. Click **Save**
31. Click on the > arrow to Expand the section
32. Click on the **Material Row Action** button and select *Attachments*
33. Click the **Select File** button
34. Browse to folder and select *Fence_Wire_406Certs.pdf*
35. Click **Open**
36. Enter *Form 406* in the **Description** field
37. Click **Save**

29. Acknowledge an Estimate Exception

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Payment Estimates>Contract *07817[x]*

1. Click on Estimate number *0003* link
2. Click on the **Exceptions** tab
3. Expand Exception number 1 for Insufficient Materials.
4. In the Status field, select *Acknowledged*.
5. In the **Type** dropdown field select *Exception Remark*
6. In the **Remark** field enter *Sample taken, waiting for test results*.
7. Expand Exception number 2 for Item Overrun.
8. In the Status field, select *Acknowledged*.
9. In the **Type** dropdown field select *Exception Remark*
10. In the **Remark** field enter *Change Order in progress*
11. Expand Exception number 3 for Item Overrun.
12. In the Status field, select *Acknowledged*.
13. In the **Type** dropdown field select *Exception Remark*
14. In the **Remark** field enter *Change Order in progress*
15. Expand Exception number 4 for Item Overrun.
16. In the Status field, select *Acknowledged*.
17. In the **Type** dropdown field select *Exception Remark*
18. In the **Remark** field enter *Change Order in progress*
19. Click **Save**
20. From the Component Action Item menu select **Payment Estimate For Contractor**
21. Select **Execute**
22. Verify the **Contract Itm Line Num 0130 and 0140** on the **Adjustment Type: Overrun** line has a negative amount in the **Pay AMT This Pay Estimate** column.



30. Document Submission for PCC Mix Design

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Construction > Contract Progress

1. In the Search Box, enter [07817\[X\]](#) .
2. In the **Contract Column** ID select [07817\[X\]](#) link.
3. At the top of the page, click the [Contract Documentation link](#).
4. Click the **Document Submission** tab.
5. Click **New**.
6. In the **Description** Field, enter [Class General Mix Design Submittal](#).
7. In the **Submitted Date** field, enter [02/15/2018](#).
8. In the **Submitter** field, verify your name auto-populated.
9. From the **Type** drop-down, Select [MIXDESIGN – Mix Design Submittal](#).
10. Click **Save**.

31. Verify Work Begin date populated by trigger.

Login

Username: U

Password:

Role: EPM

Navigation

Construction > Contract Administration > Contract [07817\[x\]](#) > Contract Times tab > Informational

1. In the search box, enter [beg](#)
2. Verify the **WKBN-DT** field automatically populated to [10/25/2017](#)
3. Click on the **Home** button

32. Populate multiple Bridge Opening dates.

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation



MONTANA DEPARTMENT OF TRANSPORTATION
AASHTOWare Project Construction and Materials



Construction > Contract Administration > Contract [07817\[x\]](#) > Contract Times tab > Informational

1. In the search box, enter [brid](#)
2. In the **Actl Compl** field for **BRIDGEOPEN**, select [10/02/2017](#) from the date picker
3. In the **Comments** field, type [ABC Bridge opened to traffic](#)
4. Click **Save**
5. Click on **Select Informational Times**
6. In the search box, type [Bridge](#)
7. Select [BRIDGEOPEN](#)
8. Click **Add to Contract Times**
9. In the **Actl Compl** field for **BRIDGEOPEN** (no data), select [02/05/2018](#) from the date picker
10. Change the **Time Descr** field to [Bridge opening 2 – EPM](#)
11. In the **Comments** field, type [DEF Bridge open to traffic](#)
12. Click **Save**



33. Change Sample Rate and Frequency for acceptance on small quantity

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Construction > Contract Administration > Contract [07817\[x\]](#) > Contract Materials & Acceptance Actions

1. Click on the **Acceptance Actions** tab
2. In the **Search** field enter [701.01.03.01](#)
3. Click > symbol to expand **Curb 4 IN - Concrete (609010112) - 701.01.03.01 - Combined Concrete Aggregate** on **Class General-Optimized Material Set**
4. Click on **Gradation Testing** Acceptance Action
5. Click > symbol to expand **Gradation Testing** option
6. On the [MT 202 – Sieve Analysis](#) test, change the **Action Rate** to [0](#)
7. In the **Comments** field enter [UXXXX Accepted based on small quantities](#)
8. Click **Save**.
9. Click the **Contract Materials and Acceptance Actions** link at the top of the page.
10. Click > symbol to expand **Curb 4 IN - Concrete (609010112) - 701.01.03.01 - Combined Concrete Aggregate**
11. Click on **Comparison Testing** Acceptance Action
12. Click > symbol to expand **Gradation Testing** option
13. Click > symbol to expand **MT 202 Field – Sieve Analysis (IA Comparison)** test
14. Change the **Action Rate** to [0](#)
15. In the **Comments** field enter [UXXXX Accepted based on small quantities](#)
16. Click on the **Contract Materials and Acceptance Actions Summary** quick link
17. Click on the **Comparison Testing** link.
18. Expand the **Gradation Testing** Option
19. Click > symbol to expand **MT 202 District/Area – Sieve Analysis (IA Comparison)** test
20. Change the **Action Rate** to [0](#)
21. In the **Comments** field enter [UXXXX Accepted based on small quantities](#)
22. Click > symbol to expand **MT 202 HQ Materials– Sieve Analysis (IA Comparison)** test
23. Change the **Action Rate** to [0](#)
24. In the **Comments** field enter [UXXXX Accepted based on small quantities](#)
25. Click > symbol to expand **IA Grading Comparison** test
26. Change the **Action Rate** to [0](#)



27. In the **Comments** field enter *UXXXX Accepted based on small quantities*
28. Click **Save**
29. Click on the **Contract Materials and Acceptance Actions** quick link

34. Change Sample Rate for an emulsion material

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

1. Click on the **Acceptance Actions** tab.
2. In the **Search** field enter *emul*
3. Click > **symbol** to expand **Emulsified Asphalt CRS-2P (402020368) – 702.01.06.02 on Project 5157010000[x]**
4. Click on the **Emulsion** Acceptance Action
5. Click > **symbol** to expand **Emulsion Test – Sample & Cert** option.
6. Click > **symbol** to expand **Sample Record/Emulsified Asphalt Testing** option.
7. Change the **Action Rate** to **3**.
8. Change the **Frequency Type** to *Contract*.
9. Blank out the **Action Frequency**.
10. In the **Comments** field enter *UXXXX -There were only 3 tankers. Therefore only 3 samples taken*
11. Click **Save**.
12. Click the **Contract Materials and Acceptance Actions** link at the top of the page.



35. Add additional options for material acceptance

Login

Username: Uxxxx

Password: xxxxxxxx

Role: EPM

Navigation

1. Click on the **Materials** Tab
2. In the **Search** field enter *general*
3. Click on the **Row Actions** button of the **0300 - Concrete – Class General (551020030)/ Class General-Optimized** Material Set and select *Add Material*.
4. In the **Material** field enter *crush*
5. Select *701.02.04.02 Crushed Base Coarse Grade 6A*
6. In the **Conversion Factor** field enter *1*
7. Click **Save**
8. Verify that the number changes to *6* in the **Materials count** column
9. Click on the **Acceptance Actions** Tab
10. In the **Search** field enter *551020030*
11. Locate the **Concrete – Class General** item and verify there is a row for **701.02.04.02 – Crushed Base Coarse Grade 6A**
12. Expand the row by clicking on the > symbol next to the Project number.
13. Verify that there are 2 Tests for acceptance, **Compaction Testing** and **Comparison Testing**



36. Adding a remark for explanation of required number of binder samples not taken

Login

Username: Uxxxx

Password: xxxxxxxx

Role: EPM

Navigation

Construction > Contract Progress > [07817\[x\]](#) > Contract Materials and Acceptance Actions

1. Click on the **Acceptance Actions** tab.
2. In the **Search** field enter [64-28](#)
3. Click > symbol to expand **ASPHALT CEMENT PG 64-28 (402020092) – 702.02.09.10 (Performance Graded Asphalt Binder)**
4. Click on the [PGAB Acceptance](#) **Acceptance Action**
5. Click > symbol to expand **Daily Work Report\Sample Witness.**
6. Change the **Action Rate** to [9](#)
7. Change the **Frequency Type** to [Contract](#)
8. Blank out the **Action Frequency**
9. In the Comments field enter [UXXXX - The required frequency calculates to 9.08. 9 samples were witnessed. A 10th sample was not taken due to the small quantity difference at the end of the work.](#)
10. Click **Save**.
11. Click the **Contract Materials and Acceptance Actions** link at the top of the page.
12. Click on the **Global Actions** button
13. Select **Generate Report**
14. In the **Search** field enter [Samp](#)
15. Click on **Sampling and Testing Status Report**
16. In the **Search** field enter [07817\[x\]](#)
17. Scroll down and check the **ASPHALT CEMENT PG 64-28** row
18. Click the **Execute** button
19. On page 1 of the report, verify that the Comment added in step 14 displays under the Certification – DWR option.



37. Create a DWR for QPL acceptance

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Continuation of previous use case

1. Click the **Previous** button
2. Click on **Work Items** button
3. Click **Select Items** button
4. Type *det* in the **Search** field
5. Select Project Line Item *0550 608010125-DETEC WARNING DEVICES-TYPE 1*
6. Click the **Save** button
7. Click on the **Item Row Action** button and select **New Posting**
8. Verify that *SK CONSTRUCTION, INC.* (Prime) is auto-populated in the **Contractor** field
9. In the **Location/Description** Field, type *QPL Verification*.
10. In the **Material Set** field, Verify that DWD Type 1 is auto-populated
11. Click **Save**.
12. Click on the **Acceptance Records** Tab
13. Click on the > arrow to Expand the section
14. Hit enter in the **Source ID** field and select *EJ (East Jordan Iron Works Inc)* from the list
15. Hit enter in the **Product Name/Seal#/Batch/Lot** field and select *Duralast* from the list
16. Select *QPLSTL – QPL Verified/Steel Cert Reviewed* from **Field Inspection Value** dropdown list
17. Select *Meets Specs* from the **Certification comparison to MDT Specs** dropdown list
18. Select *Meets Specs* from the **Form 406** dropdown list
19. Click **Save**
20. Click on the > arrow to Expand the section
21. Click on the **Material Row Action** button and select **Attachments**
22. Click the **Select File** button
23. Browse to folder and select *DETECTABLE_WARNING_DEVICES.pdf*
24. Click **Open**
25. Enter *Form 406 and Certifications* in the **Description** field
26. Click **Save**



38. Create a diary adjustment to a previous diary adjustment

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [07817X](#)

1. Go to the **Weekly Report of Time Charges** tab
2. Click [Show first 10](#) (if not already expanded)
3. From the row action for **Week Ending 11/25/2017** for **Contract Time 00 AT-GRADE, GRVL, PMS AND STRUCTURE**, under Reports, select [Weekly Report of Time Charges](#)
4. Click **Execute**
5. Verify 11/24/2017 is a Charge day and under the Diary Adjustments This Week section that 11/24/2017 is a No Charge day
6. Close the window
7. Click the **Previous** button
8. Go to the **Diary Adjustments** tab
9. Click **Select Diary Contract Time Charges**
10. In the search box, enter [11/24/17](#)
11. Select the **Time ID 00 AT**
12. Click **Add to Diary Adjustments**
13. Click the row to expand it
14. In the **Current Time Charge** field, enter [1](#)
15. In the **Comments** field, enter [Impacted traffic](#)
16. Click **Save**
17. Go to the Weekly Report of Time Charges tab
18. From the row action for **Week Ending 11/25/2017** for **Contract Time 00-GRADE, GRVL, PMS AND STRUCTURE**, under Reports, select [Weekly Report of Time Charges](#)
19. Click **Execute**
20. Verify under the Diary Adjustments This Week section that 11/24/2017 has a No Charge day and a Charge day
21. Close the window



39. Create a diary adjustment on a calendar day milestone that was not originally charged, and the diary is locked

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [07817X](#)

1. Go to the **Weekly Report of Time Charges** tab
2. Click **New**
3. In the **Week Ending** calendar popup, select [11/25/2017](#)
4. Click in the Contract Time field and hit enter
5. Select [MLSTNCD](#)
6. Click **Save**
7. From the row action button, under Reports, select [Weekly Report of Time Charges](#)
8. Click **Execute**
9. Verify the Time Charged column is blank on [11/23/2017](#)
10. Close the window
11. Click the **Previous** button
12. Go to the **Diary Adjustments** tab
13. Click **Select Diary Contract Time Charges**
14. In the search box, enter [11/23/17](#)
15. Select the **Time ID** [MLSTNCD](#)
16. Click **Add to Diary Adjustments**
17. Click the row to expand it
18. In the **Current Time Charge** field, enter [1](#)
19. Click **Save**
20. Go to the **Weekly Report of Time Charges** tab
21. From the row action for **Week Ending** [11/25/2017](#) for **Contract Time** [MLSTNCD](#), under Reports, select [Weekly Report of Time Charges](#)
22. Click **Execute**
23. Verify under the Diary Adjustments This Week section that 11/23/2017 has a Charge day
24. Close the window



40. Add Attendees Manually

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Continuation of previous test case

Attendees

1. Click the **New** button
2. In the **Title** type *District Construction Engineer*
3. In the **First Name** type *Mike*
4. In the **Last Name** type *Taylor*
5. In the **Organization** type *MDT*
6. In the **Email Address** type mctaylor@mt.gov
7. In the **Phone Number** type *406-657-0233*
8. Click **Save**

41. Add Attendees from Persons

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Continuation of previous test case

Attendees

1. Click the **Down Arrow** next to the **New** button
2. Click **Select Attendees** under Actions
3. In the **Search Box** type *Durbin*
4. Select **Lisa Durbin**
5. Click **Add to Attendees**
6. Click **Save**



42. Delete an Attendee

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Continuation of previous test case

Attendees

- 1.
2. Click the **Row Action Button** next to Lisa Durbin
3. Click **Delete** under Actions
4. Click **Save**

43. Add an Attachment to a Meeting – Attendance Roster

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Continuation of previous test case

1. Open **Component Actions Menu**
2. Select **Attachments**
3. Click **Select File**
4. In **the share drive folder** select **Precon_Sign In Sheet**
5. Click **Open**
6. In **Description Filed** type *Attendance Roster for Milk River – North - Pre-Construction Conference*
7. Click **Save**



44. Add a Contractor obtained Permit to a contract

Login

Username: U

Password:

Role: EPM

Navigation

Construction > Contract Administration > Contract [07817\[x\]](#) >Permits

1. Click the **New** button
2. In the **Permit Type** select [318_AUTH-318 Authorization](#)
3. In the **Obtained Date** select [03/01/18](#)
4. In the **Remarks** type [received Contractors 318 Authorization – see attachment](#)
5. In the **Permit ID** tab type [MTB001234](#)
6. Click **Save**

45. Attach a permit to a Contract

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Continuation of previous test case

1. Click the **Down Arrow** next to the **Save** button
2. Click **Attachments** under Views
3. Click **Select File**
4. Navigate to your team folder and select [318_Authorization.pdf](#)
5. Click **Open**
6. Click **Save**



46. Add an item to a plan discrepancy associated with a contract project.

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Continuation of previous test case

1. Click on the **Contract Project Items** tab
2. Click the **Select Contract Project Items** button
3. In the **Search** field hit **Enter**
4. Verify that only items from Contract Project ID *5157010000[x]* are listed
5. In the **Search** field type *crush*
6. Check the *CRUSHED AGGREGATE COURSE* item
7. Click the **Select Contract Project Items** button
8. Verify the record was saved by clicking Show first 10

47. Add Error & Omissions remark to an existing plan discrepancy

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract *07817[x]* > Contract Documentation

1. Click on the Plan Discrepancies Tab
2. Click on the **Overran Special Borrow** discrepancies link that was created in the previous steps
3. In the **Type** dropdown select *Errors & Omissions*
4. In the **Remark** field enter *Determined that errors & omissions will not be assessed*
5. Click **Save**



48. Start a milestone

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Construction > Contract Administration > Contract [07218\[x\]](#) > Contract Times tab

1. Under the **Site** section, click the **Time ID 01** link.
2. Click on the **Units and Dates** tab.
3. On the **Notice to Proceed / Milestone Start**, select [03/08/2018](#) from the date picker
4. Click **Save**.
5. Click on the **General** tab.
6. Enter an Effective Date.
7. On the **Status** dropdown list, verify it is [Active](#).
8. Click **Save**.

49. Complete a milestone

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Construction > Contract Administration > contract [07817\[x\]](#) > Contract Times tab > Site Time component

1. Click on the **Time ID [MLSTNCD](#)** link
2. Click on the **Units and Dates** tab
3. On the **Stop Time**, select [03/10/2018](#) from the date picker
4. Click **Save**



50. Adding quantities to an existing stockpile

Login

Username: Uxxxx

Password: xxxxxxxx

Role: EPM

Navigation

Dashboard>Contract Progress>Contract [07817\[x\]](#)>Construction Stockpile

1. Click on stockpile [0001](#).
2. Click on the [New](#) button.
3. Enter [Adding additional quantities to existing stockpile](#).
4. Enter [Letter](#) in the Invoice Number field.
5. Enter [1-12-2018](#) in the Invoice Date
6. Enter [1000](#) in the Invoice Quantity field.
7. Enter [See letter in share drive requesting payment](#) in the Invoice Description field.
8. Select [0040 – 9028052000\[x\] – 0001](#) from the drop down list under Project Item Distribution.
9. Enter [1000](#) in the Constr Stockpile Amt field.
10. Select **Save**.
11. Verify that the additional \$1,000.00 stockpile payment is included on the estimate.
12. Verify that an amount is subtracted off the stockpile for the DWR payment.



51. Manual Entry of a Positive Milestone Adjustments

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Contract Progress>Contract [07817\[x\]](#) >Payment Estimates

1. Select Estimate Number [0003](#).
2. Select **Contract Adjustments**.
3. Select **New** Under User Generated Contract Adjustment.
4. From the **Type** Field select [Incentive](#).
5. In the **Days** Field enter [2](#).
6. In the **Amount** field enter [7000](#)
7. From the **Time ID/Description** Field select [MLSTNCD -Calendar Day](#) (need to click in field and enter a return to see descriptions)
8. Select **Save**
9. Verify that the **Time Units** calculate as 2.



52. Add a Negative Fuel Price Adjustment and Distribute to Multiple Projects

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Contract Progress > Contract [07218\[x\]](#) > Payment Estimates

1. Select Estimate Number **0001**.
2. Select **Contract Adjustments Tab**.
3. Select **New** under User Generated Contract Adjustment.
4. Under Type Select [Other Contract Adjustment](#).
5. Under Other Contract Adjustment Type Select [Fuel Price – Fuel Price Adjustment](#).
6. Enter -540.00 in the Amount Field.
7. Enter [See Fuel Price Adjustment Spreadsheet in Share Drive](#).
8. Select Save
9. Click on **Percentage** Under Distributed By
10. Select [Amount](#) Under the Distributed By Field
11. Click on **Save**
12. Under **Projects** for project **8991039000J - WEST OF ROUNDUP – WEST** enter [-200.00](#)
Note: Ignore the prepopulated percentage.
13. Under **Projects** for project **8902353000J - SF - 149 ROUNDUP SAFETY IMPRV** enter [-340.00](#)
Note: Ignore the prepopulated percentage.
14. Click on **Save**



53. Positive QA Adjustment

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Dash Board

1. From the dashboard select the Contract Progress Component.
2. Select contract [07218\[x\]](#).
3. Select **Payment Estimates** tab
Note: may need to select show first 10 to display estimates.
4. Click on Estimate Number [0001](#).
5. Select **Item Adjustments** tab.
6. Under User Generated Dollar-Based Item Adjustments click on **Select Project Items**.
7. Select Line item number [0130 \(401020065, PLANT MIX SURF GR S-3/8 IN\)](#)
8. Select **Add to Item Adjustments** button at bottom of screen.
9. Under **Other Item Adjustment Type** Select [QA Density – QA Density](#).
10. Enter [4,000.00](#) in the amount field.
11. Enter [For first lift of plant mix](#) in comments field.
12. Select **Save**.

54. Negative Non-QA Adjustment

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Continuation from previous

1. Select **Item Adjustments** Quick Link.
2. Under User Generated Dollar-Based Item Adjustments click on **Select Project Items**.
3. Select Line item number [0140 \(401020300 - HYDRATED LIME\)](#)
4. Select **Add to Item Adjustments** button at bottom of screen.
5. Select Type of [Other Item Adjustment](#).
6. Under Other Item Adjustment Type Select [Non QA Adjustments – Non QA Adjustments](#).
7. Enter [-1000.00](#) in the amount field.
8. Enter comment of [See X:\Const\SiteManager_Contracts\CREW_4181\JCT_MT_7-EAST_18915_4881003\07_MATERIALS\NON-QA\HydratedLime_Deduct.pdf](#)
9. Select **Save**.



55. Manual Entry of a Negative Milestone Adjustments

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Contract Progress>Contract [07218\[x\]](#) > Payment Estimates

1. Select Estimate Number [0001](#).
2. Select **Contract Adjustments**.
3. Select **New** Under User Generated Contract Adjustment.
4. From the **Type** Field select [Disincentive](#).
5. In the **Days** Field enter [-2](#)
6. In the **Amount** field enter [-8000](#)
7. From the **Time ID/Description** Field select [01- CURRANT CREEK BRIDGE DIGOUT INCENTIVE/DISCINTIVE](#) (need to click in field and enter a return to see descriptions)
8. Select **Save**
9. Verify that the **Time Units** calculate as [-2.00](#)



56. Test that estimate exception is created with an item that has not been funded

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Dash Board

1. Click on the **Contract Progress Component**
2. Select Contract [16116\[x\]](#)
3. Click on the **Payment Estimates link**.
4. Click on the **Add Payment Estimate button**.
5. Select Period End Date of [01-25-2018](#)
6. Click the **Add Payment Estimate** button.
7. Verify the process started successfully by the message box at top of screen
8. Click on the **Process History Overview** quick link at the top of the page.
9. Look for a process titled AddPaymentEstimate with the current date and time.
Note: You may have to hit F5 to refresh the page until the process has completed.
10. Verify a Success of Yes. Click on the **AddPaymentEstimate.log** link.
Note: When clicking on the AddPaymentEstimate.log a popup will open at the bottom of the screen. Click on open to view the log file.
11. Verify there were no errors in the log file.
Note: If an error is encountered follow instructions in the .log file.
12. From the Previous link dropdown, select **Contract Progress Summary**.
13. Click on the **Payment Estimates** link.
14. Search on **contract ID** or select **show first 10**.
15. Select Contract [16116\[x\]](#)
16. Verify that a Draft Payment Estimate was created.
17. Click on **Estimate Number 0001**
18. Click on the **Exceptions** tab
19. Verify a **Funding Check** exception is created



57. Manual Entry of Liquidated Damages

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Contract Progress>Contract [16116\[x\]](#) > Payment Estimates

1. Select Estimate Number [0001](#).
2. Select **Contract Adjustments**.
3. Select **New** Under User Generated Contract Adjustment.
4. From the **Type** field select [Liquidated Damage](#).
Note: The Time ID/Description field will automatically populate.
5. In the **Days** Field enter [-2](#)
6. In the **Amount** field enter [-2792](#)
7. Select **Save**
8. Verify that the Time Units calculate correctly as -2.

58. Delete a Progress Estimate

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Dash Board

1. Click on **Payment Estimates** Link
2. In the **Search** field enter [07218\[x\]](#)
3. In the row action items for Contract [07218\[x\]](#); Estimate number 0001 select **Delete**.
4. Select **Save**.
5. Verify estimate was deleted.



59. Create a change order for a federal oversight (PoDI) contract and create a custom explanation.

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [07817\[x\]](#) > Change Order tab

1. Click **Add**
2. Verify that **Change Order Date** defaults to today's date
3. Verify that the **Author** is your name
4. In the **Description** field, enter *Time extension due to award delay*
5. Under the **Approval Rules**, select *CO-P – Change Order - PoDI*
6. Select the Reason *TA – Time Adjustment*
7. Click **Save**
8. Verify that **the PoDI (FHWA)** says Yes
9. Verify that the **Entered By** and **Entered Date** fields are populated
10. In the **Seq Nbr** field, enter *1*
11. In the **Gen/Supp Explanation** field, type *Contract time is extended for delays in the award of the contract. The delays were beyond the control of the contractor.*
12. Click **Save**



60. On a PoDI contract, add contract time and verify the approval groups.

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Change order from previous test case for [07817\[x\]](#) "Time extension due to award delay"

1. Click the **Time Adjustments** tab
2. Click the **Select Contract Time** button
3. Click in the search field and hit enter
4. Select 00AT GRADE, GRVL, PMS AND STRUCTURE
5. Click **Add Time Adjustments to Change Order**
6. In the **Adjustment Time Units** field, enter **5**
7. Click **Save**
8. Click the **Approval Tracking** tab
9. Click the down arrow and select **Assign Default Approval Groups**
10. Verify the following roles are added:
 - 1 – Contractor, 2 – EPM, 3 – Construction Reviewer, 4 – District Construction Engineer, 7 – FHWA



61. On a non-PoDI contract, add a new contract item less than \$50,000 to a new category. Extend calendar days more than 6 days. Verify the approval groups go through CASE.

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [07218\[X\]](#) > Change Order tab

1. Click on **CO Num** [0001](#)
2. Click the **New Items** tab
3. Under the Contract Items section, click the **Select Contract Item** button
4. In the **Contract Item** field, type [guard](#)
5. Choose item [0220 606010040 GUARDRAIL-STEEL BOX BEAM](#)
6. Select [WEST OF ROUNDUP – WEST category 0003 AR 13615](#)
7. Click **Add to Change Order**
8. In the **Project Item Line Number** field, change it to [901010](#)
9. In the **Quantity** field, enter [155](#)
10. On the **Funding** dropdown, select [AR-O – AR 13615](#)
11. Click **Save**
12. Click the **Time Adjustments** tab
13. Click the **Select Contract Time** button
14. Click in the search box and hit enter
15. Select the **Time ID** [00 AT](#)
16. Click **Add Time Adjustments to Change Order**
17. In the **Adjustment Time Units** field, enter [10](#)
18. Click **Save**
19. Click the **Approval Tracking** tab
20. Click the down arrow and select **Assign Default Approval Groups**
21. Verify the following roles are added:
 - 1 – Contractor, 2 – EPM, 3 – Construction Reviewer, 4 – District Construction Engineer, 5 – District Administrator, 6 – Construction Administration Engineer



62. Change a change order that has a rejection back to draft, modify the change order and resend it for comment. Run the change order report

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [JC218\[x\]](#) > Change Orders tab

1. Click on **CO Num** [0001](#)
2. Note the **Status** at the top is Rejected
3. Click on the **Review Tracking** tab
4. Review the **Decision Comments**
5. Click on the **Increase/Decrease Items** tab
6. Note the large quantity, the reason for the comment
7. Under the **Component Action** button, select [Change to Draft](#)
8. In the **Quantity** field, change it to [12,050](#)
9. Click **Save**
10. Under the **Component Action** button, select [MDTChangeOrderReport](#)
11. Click **Execute**
12. Verify the **Net CO Amount** is \$12,050
13. Verify there is not a signature line
14. Close the window
15. Click the **Previous** button
16. Click on the **Review Tracking** tab
17. Click **Select Reviewers**
18. Change the custom filter from System Default to [2-Butte CO](#)
19. Click [All](#)
20. Click **Save**
21. Verify the **Status** changed to Pending Review
22. Click the **Home** button



63. Submit a change order for review

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Change order from previous test case for [07218\[XJ\]](#) "[AR 13615, Guardrail Repair](#)"

1. Click on the **Review Tracking** tab
2. Click **Select Reviewers**
3. Change the custom filter from System Default to [5-Billings CO](#)
4. Click [All](#)
5. Click **Save**
6. Verify that a warning message appears indicating that the New Contract Item has modified the Current Quantity
7. Close the warning box
8. Verify the **Status** changed to Pending Review
9. Click the **Home** button

64. Test the change order approval process

Login

Username: Uxxxx

Password: xxxxx

Role: MDTContractor

Navigation

Construction > Change Order > Contract [16116\[x\]](#) > Change Orders tab

1. Click on CO Num [0002](#)
2. Note the **Status** at the top is Pending Approval
3. Click on the **Approval Tracking** tab
4. Note the only approval level that has a **Decision Requested** date is the Contractor
5. Under the **Component Action** button, click [Approve](#)
6. In the **Approval Decision Comments** box, enter [Contractor signed change order on 8/19/18](#)



7. Click **Save**
8. Change the role to EPM
9. Under the **Component Action** button, click [Attachments](#)
10. Click **Select File**
11. Navigate to the folder XX
12. Select file [16116_CO-0002_Signature.pdf](#)
13. Click **Open**
14. In the **Description** field, enter [Contractor ink signature](#)
15. Click **Save**
16. Click the **Previous** button
17. Click on the **Approval Tracking** tab
18. Note the next level that has a **Decision Requested** date is the EPM
19. Under the **Component Action** button, click [Approve](#)
20. In the **Approval Decision Comments** box, enter [Approved on 8-20-18](#)
21. Click **Save**

65. Review an approved change order

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Continue from previous test case

1. Click the **Contract Progress** Quick Link
2. Click on CO Num [0003](#)
3. Note the **Status** at the top is Approved
4. Under the **Component Action** button, under Historical Reports, select [MDT Change Order Report](#)
5. Click **Open** to the prompt “Do you want to open or save...”
6. Verify the **Net CO Amount** is \$8,613.00
7. Verify it says “Ink Signature on File” under the contractor name



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8. Verify all of the approval groups and the approval dates are displayed
9. Close the file
10. Click the **Contract Progress** Quick Link
11. Click the **Contract Materials and Acceptance Actions** Quick Link
12. At the bottom of the item list, verify that **Item** 603012660 **Description** RCP 36 IN CLASS 4 **Proj Item** 903010 is in the list
13. Verify the **Material Set** is RCP
14. Click the > arrow to expand the row
15. Verify **Material** 708.01.01.01 – Reinforced Concrete Pipe and **Material** 701.04.01.01 Bedding Material are listed
16. Click the **Home** button



66. Use the balance item function.

Login

Username: Uxxxx

Password: xxxxx

Role: EPM

Navigation

Construction > Contract Progress > Contract [07817\[x\]](#) > Change Order tab

1. Click **Add**
2. Verify that **Change Order Date** defaults to today's date
3. Verify that the **Author** is your u-number
4. In the **Description** field, enter [Increase Unclassified Borrow to the final quantities](#)
5. Under the **Approval Rules**, select [CO-P – Change Order - PoDI](#)
6. Select the Reason [QTY – Quantity](#)
7. Click **Save**
8. Verify that the **PoDI (FHWA)** says Yes
9. In the **Seq Nbr** field, enter [1](#)
10. In the **Standard Explanation Name** field, type [final](#) and select [Final Quantity](#)
11. Click **Save**
12. Click on the **Items** Quick Link
13. In the search field, enter [203020200](#)
14. Under the **Row Action** button, click [Mark Item Complete](#)
15. Verify a warning message displays indicating there are DWR Item Postings not associated to a Payment Estimate and that the Quantity Posted exceeds the Current quantity
16. Click the **Previous** button
17. Click on the **Increase/Decrease Items** tab
18. Click the **Balance Completed Items** button
19. In the search box, hit enter
20. Select **Item – Description** [203020200 EXCAVATION-UNCLASS BORROW](#)
21. Click **Balance Completed Items**
22. Click the **Home** button



67. Manually Close Out Stockpile

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Contract Progress>Contract [07817\[x\]](#)

1. Click on stockpile [0001](#).
2. Click on the [New](#) button.
3. Enter [Close Out Stockpile](#) in the Comment field.
4. Select [0220 – 5157010000\[x\] – 0001](#) from the drop down list under Project Item Distribution.
5. Enter [– 6737.20](#) in the Constr Stockpile Amt field.
6. Select [0410 – 90208052000\[x\] – 0003](#) from the drop down list under Project Item distribution.
7. Enter [– 1000.00](#) in the Constr Stockpile Amt field.
8. Select **Save**.
9. From the action menu select [Close Stockpile](#).
10. Verify the Status has changed to **Closed**.



68. Populate Final Walk-through time records.

Login

Username: UXXXX

Password:xxxx

Role: EPM

Navigation

Construction > Contract Administration > Contract [07817\[X\]](#) > Contract Times tab

1. On the FINALWALKTHRU, enter [01/01/2018](#) in the **Actl Compl** date.
2. Click **Save**.
3. Under Recurring Times, on Punch List Time, click the **Expand/Collapse Arrow** next to ID.
4. Verify the **Planned Occurrence** date is 01/31/2018.
5. On **Actual Occurrence** date, enter [01/15/2018](#).
6. Click **Save**.
7. Under Informational Times, on the FINALVER, in **Actl Compl** date, enter [01/16/2018](#).
8. Click **Save**.
9. Under Recurring Times, on CONDFINALACCPT, click the **Expand/Collapse Arrow** next to the time ID.
10. Verify the **Planned Occurrence** date is 02/15/2018.
11. On the CONDFINALACCPT recurring time, in the **Actual Occurrence** date, enter [02/01/2018](#).
12. Click **Save**.
13. Next to Recurring Time ID FNLDUEDIST, click the **Expand/Collapse Arrow**.
14. Verify the **Planned Occurrence** date is 03/03/2018.
15. In the **Actual Occurrence** date, enter [03/05/2018](#).
16. Click **Save**.
17. Next to FNLDUEHELENA Time ID, click the **Expand/Collapse Arrow**.
18. Verify the **Planned Occurrence** date is 04/04/2018.
19. Next to MPDES/NPDES Time ID, click the **Expand/Collapse Arrow**.
20. Verify the **Planned Occurrence** date is 04/07/2018.
21. Next to FNLMCERT-MICO Time ID, click the **Expand/Collapse Arrow**.
22. Verify the **Planned Occurrence** date is 04/02/2018.



69. Populate actual dates for Seal Coat Inspection and Final Acceptance.

Login

Username: UXXXX

Password: xxxxx

Role: EPM

Navigation

Construction > Contract Administration > Contract [07817\[X\]](#) > Contract Times tab > Informational Times

1. On the S&C-NOISSUES, in the **Actl Compl** date, enter [02/15/2018](#).
2. Click **Save**.
3. Click the **Expand/Collapse Arrow** next to FNLACCEPT Time ID record.
4. Verify the **Planned Occurrence** date is 02/25/2018.
5. On the FNLACCEPT recurring time, enter [02/26/2018](#) in the **Actual Occurrence** date.
6. Click **Save**.
7. Return to Contract Time tab.
8. Next to FNLDUECONT Time ID, click the **Expand/Collapse Arrow**.
9. Verify the **Planned Occurrence** date is [05/07/2018](#).
10. Under the Site Time, click on the [00 AT](#) Time ID link.
11. Click on the Units and Dates tab.
12. Verify the **Actual Completion** is 02/26/2018.



70. Run the Certificate of Completion of Construction Contract report.

Login

Username: Uxxxx

Password: xxxxxx

Role: EPM

Navigation

Use the following link (Ctrl+Click):

[JRS Certificate of Completion of Construction Contract](#) OR

Home > External Links>Jasper Reports > Login > View > Repository > MDT > Protected > AASHTOWare > _Use Case Testing Reports > Construction > Certificate of Completion of Construction Contract

1. In the **District**, select *Glendive*.
2. In the **Contract**, select *07817[X]*.
3. Click **Apply**.
4. Hover over the Export icon, select *PDF*.
5. Print the report.