AASHTOWare Project Construction and Materials Inspector Role – Daily Work Reports Training Manual

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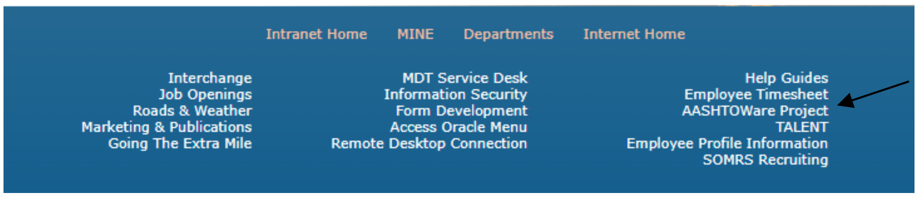
Intranet & AASHTOWare Information page

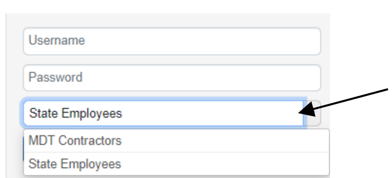
A. Click on the internet Browser.
   a. Chrome or Edge
B. Navigate to the blue box at the bottom of the screen
C. Click on the AASHTOWare Project link



Information about AASHTOWare can be found here. This is also known as Construction and Materials. The links included are:

- Website
- Cheat Sheets
- Business Processes
- How-to-Videos
- Newsflashes
- QA file set up information
- AASHTOWare Help Desk contact information

D. Click on the Web Site link to get to the AASHTOWare Web page.
   a. It is recommended save this as favorite
   b. To log in to AASHTOWare, use your U number and Windows password.
   c. For CEI's: Use your contractor email address and password. Change the drop down from State Employees to MDT Contractors



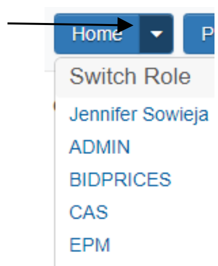
Working with Daily Work Reports

1. Navigation through the Home Dashboard and Quick links

The upper left corner of the page navigation buttons. These buttons do not change no matter the screen the user is on.

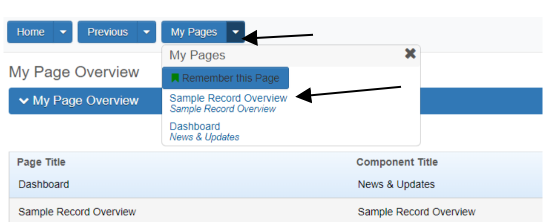
a. **Home**: Will always navigate to this page
b. **Previous**: Will take you back one screen
c. **My Pages**: Similar to a favorite in AASHTOWare

Home:
AASHTOWare will always log back into the role that was last used. If multiple roles are assigned to the user, click on the white drop arrow next to Home to toggle between the roles.



Previous:
The white drop next to Previous will open up a list of the last places the user has visited. This works well when navigating to different sections as needed without the need to constantly select the Home button.

My Pages:
Using the white drop arrow next to My Pages will allow pages to be saved as a favorite and will create a list. A longer list will populate in the My Pages button.



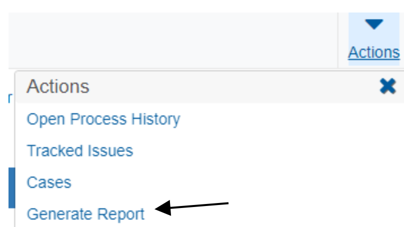
Like the Home, Previous and My Pages, these icons will not change no matter the screen the user is on.

a. These icons are
b. **Actions:** Used to Generate Reports
c. **Help:** AASHTOWare' s internal help guide
d. **Log off**

Actions - Global

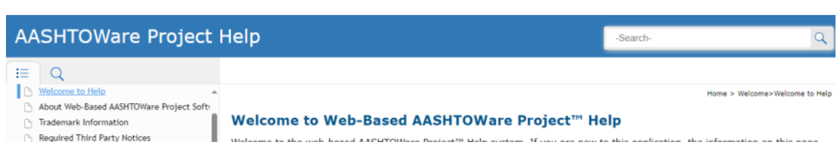
Clicking on Actions then Generate Report will bring up the reports page. The user will be able to obtain data depending on the information needed.

a. Using the search box will allow the user to access a report quickly. The user can also scroll through the list.
b. Commonly used reports are:
    i. Contract Material Acceptance (Checklist)
    ii. Item Posting by Item
    iii. Sample Records Report (Contract)
    iv. Test Results report.



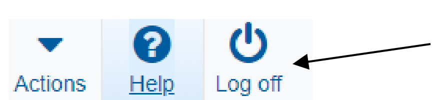
Help: Internal Help Page

a. This is a very extensive list.
b. Searchable for requested information.



Log off

Will exit the user from the system.



Quick Links

Quick links are used to navigate quickly between areas within AASHTOWare depending on the users need. These do change between the screens depending on where the user is located. Quick links are very beneficial for sample records, Contract progress and other areas.
These links are located under the Home button in the upper left corner. Examples of quick links are:

Home Dashboard quick links are based on the blue component ribbons.

On this page: External Links Rejected Daily Work Report Overview Reference Data Inspector Links Civil Rights & Labor Daily Work Report Overview

Sample record quick links: Overview is extremely useful as it takes the user back to the Sample Record Overview.

Overview Find Sample Maintain Test Queue Receive at Destination Lab Receive at Lab Unit Review Samples Review Tests

Daily Work Report Quick links:

Administration Overview Daily Work Reports Contract Administration Contract Daily Work Reports Contract Materials and Acceptance Actions Contract Progress Find Sample Items
Payment Estimate Subcontracts

Component Ribbons and Rows

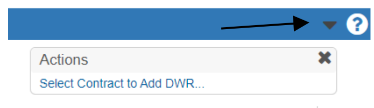
Component ribbons are the dark blue ribbons located in different locations within the system. Inside of these components are rows of items that are grouped within a specific type of component. As an inspector, there are multiple rows within the Inspector Component. By clicking on a link within the row, it will complete an action for that specific item.

Inspector Links

Contract Administration
Contract Permits
Contract Progress
Contract Vendor Assets
Daily Source Reports
Daily Work Report
Enter Test Results
Find Sample
Sample Records

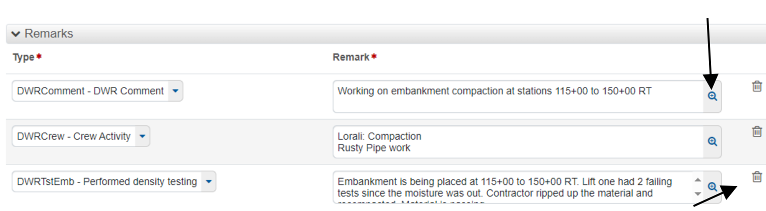
2. Creating A Daily Work Report

1. Select the **Daily Work Report** row under the Inspector link
    a. The user can also use the Daily Work Report Overview Component at the bottom of the page.
2. Click on the **white drop arrow** on the right side of the component ribbon
3. Click on the **Select Contract to Add DWR**



4. Enter in **the 5-digit contract number**
    a. The user can also put their cursor in the search box and hit enter. This will bring up the contracts the user has access to.
5. Select the **contract by clicking on the contract**.
    a. A green checkmark will appear on the selected contract.
6. Click on the **Create DWR on Contract**.
7. **Save**
8. **The Date and Inspector name** will automatically appear as it is based on the current date and the inspector that is signed in to AASHTOWare at the time.
9. Enter in the **Weather Type**
    a. Verify with the Lead Inspector/FOP/EPM on whom should be documenting the weather.
10. Enter in the **temperature**
11. **Remark Type and Remark** are where the user will enter information detailing the site information for that day. It is recommended that brief, but specific information is entered into the remarks.
    a. For suggestions of what to include, the cheat sheets Daily Work Report Tips and Daily Work Report Remark Types are beneficial.
12. **Save**
    a. This is a working document so as information needs to be entered, it can be accessed at any time.

Note: Remarks can be deleted after a save by selecting the trashcan on the right side of the row. The row will turn dark gray. This is a double check that the correct row is selected. If the incorrect row is selected, it can be undone by clicking on undo button on the row.
Selecting the little magnifying glass on the remark will open a larger window for the user to see all comments being added.

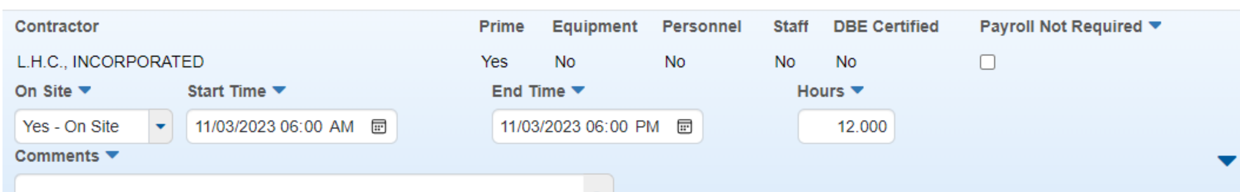


3. Adding Contractor(s),Equipment, Personnel and Staff

Adding contractor information is an important step in a complete DWR. This information does tie into certified payrolls.

Contractors:

1. Click on the **Contractors Tab**
2. Click on the **Select Contractors** button
3. **Select the contractor(s)** that is on site working for that day
   a. Multiple contractors may be selected if it applies.
4. Click the **Add to DWR Contractors** button
5. **Select the correct On – Site option**
   a. See **Note** below
6. Enter the **Start/End time** if applicable
7. **Save**



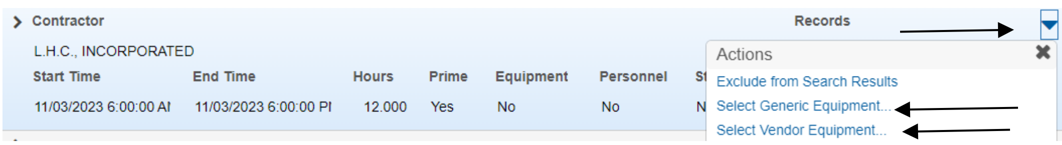
Note: There are 2 options that the user can pick from in the On Site field. They are Yes – On site and No – Comments Required. If the user selects the Yes – On Site option, then the Start and End time are available for data entry. ***Start and End times are a requirement per Legal*** and need to be documented. Hours does not auto populate and the user will need to total the hours worked for that contractor.

If the user selects the No – See Comments option, the Payroll Not Required checkbox will auto check and the Start/End times will blank out upon saving. However, the user **mus**t add in a brief but specific comment in the Comments field explaining why a Payroll will not be needed. Examples include Pay items only, Corrections to a bid item pay quantity, material set corrections or Materials Acceptance actions only.

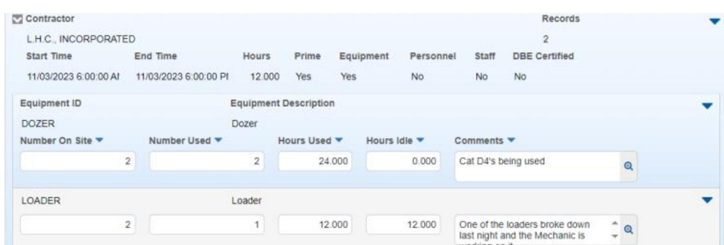
On the following tabs, Contractor(s) will auto populate the tabs since it pulls in the information from the contractor tab.

Equipment:

8. Click on the **Contractor Equipment Tab**
9. Click on the blue Row Action button and click on the **Select Equipment** Button
   a. **Generic Equipment:** This is the Global List of equipment that can be used by a contractor.
   b. **Vendor Equipment**: is equipment that the FOP/EPM has designated for the specific contractor.
   c. Either of these options may be used.



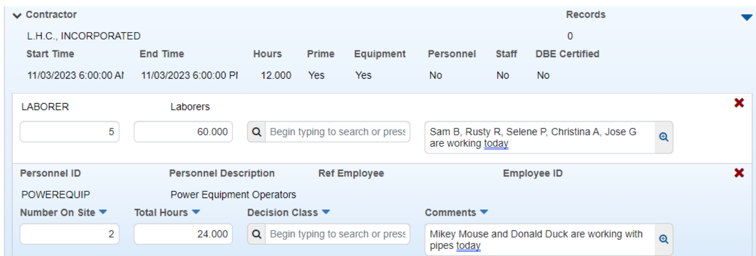
10. **Click on the appropriate equipment** that is being used for that day.
    a. Verify with Lead inspector, FOP, or EPM about who is responsible for the equipment being used on site.
11. Click the **Add to DWR Contractor Equipment** button
12. Enter in the **Number on Site**
13. Enter in the **Number Used**
14. Enter in the **Hours Used**
15. **Save**



Personnel:

1. Click on the **Contractor Personnel Tab**
2. Click on the Row Action button and click on the **Select Personnel**
   a. Like the equipment, you can use Generic or Vendor Personnel. This will bring up the contract classifications. Click on the classifications that apply to that day.
   b. Do **NOT** use Select Employee. This will pull from the Global Reference employee list and not contractor specific. There is no way to verify that the employee chosen will be the correct employee, especially if they have similar names.
3. Click the **Add to DWR Contractor Personnel button**
4. Enter in the **Number of personnel for each classification** that is on site

5. Enter in the **total number of hours** worked for the personnel
6. A decision class can be used if needed. It is not tied to any payrolls at this time
    a. **For contracts Let after June 9th, 2022, Decision class for all project locations will use Zone 1.**
7. Comments may be added to document the personnel names on site for the day.
8. **Save**



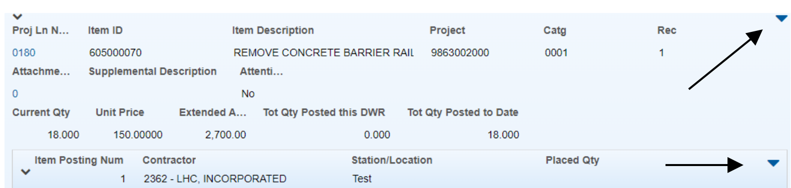
Contractor Staff:

1. Click on the **Contractor Staff Tab**
2. Click on the Row Action button and click on **Select Staff**
3. Click on the appropriate personnel
4. Click the **Add to DWR Contractor Equipment** button
5. In the **Number on Site** field enter the quantity of staff on site
6. In the **Total Hours** field enter
7. Click **Save**

Note: If this list comes in blank, talk with the EPM/FOP. This is a list that they will need to add personnel to the vedor.

4. Create a DWR to record Placed Quantities

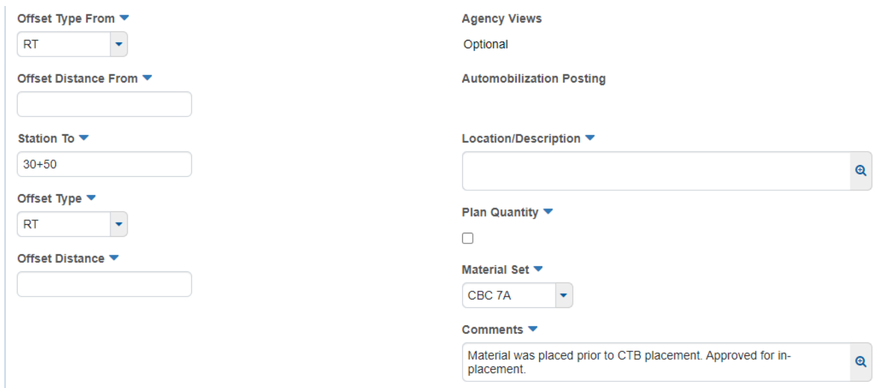
1. Click on the **Work Items Tab**
2. Click the **Select Items** button
3. In the **Search field**, user can type in the name of the bid item that needs to be paid for or scroll through the list.
4. Select the **bid item**
   a. Keep in mind the category and the line item number.
5. **Save**
6. Expand the bid item by clicking on the **>** next to the Proj Ln Nu in left corner of the bid item
   a. This will create the very first posting
   b. To create a sequenced posting, click on the blue arrow on the bid item and select **Create Posting**.
7. **Verify that the correct contracto**r is populated in the Contractor field.
   a. If it is not the correct contractor, delete the posting by using the blue row arrow on the posting and save
   b. Select the correct contractor on the Contractor tab.



8. **The Placed Quantity field** can be left blank if there is an agency view associated with the bid item.
   a. If the item does not have an agency view, enter in the correct unit amount being paid. If unsure of the item unit, on the right side of the posting, it will give the unit of how it is to be paid for
   b. For unit rounding, see specification table 109.02.1 in the Spec book
9. In the **Station From** field enter in the station that applies for this item
10. In the **offset dropdown**, select the applicable LT, RT, or CL
11. In the **Offset Distance field**, type in the offset footage from Centerline as applicable
12. Fill in the information in the **Station to** field
13. Fill in appropriate information in the **Location/Description** field if applicable
    a. A station should be used for all items.

b. Items that use a different spreadsheet, i.e., Guardrail/Fencing/Signing, the location/description field can used the comment of Multiple locations and to see the appropriate spreadsheet.
c. The comments box should be used to document the pathway for the correct spreadsheet or any other comments as appropriate.

14. **Verify the correct material set** is populated.
15. **Save**



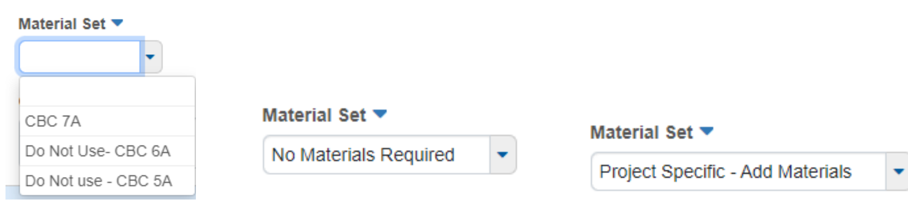
5. Daily Work Report Material Sets

Material sets are a set of material testing requirements that are based on the MDT Materials Manual 601 section for Sampling and Testing.

It is extremely important that material sets are chosen correctly when the DWR posting is created. This can affect the number of samples that are needed or certifications that are missing. A few things to note:

a. If there are no materials requirements, this will populate as No Materials Required.
b. If there is one material requirement associated it will auto-populate with the correct material set.
c. **<u>If it is blank, there are options</u>**. (Concrete, paint, aggregate for example) The correct material set will need to be selected.
    i. Verify what material set is to be used
d. **<u>If the material set shows Project Specific – Add Materials</u>**, stop and verify with the FOP/EPM about the material set and the correct materials
    i. Project Specific is a place holder for materials only and material sets and/or material codes need to be added as appropriate.
e. If it shows No Materials Required and it is an item that requires materials per the Materials Manual 601 Section, stop and verify with EPM/FOP
f. There was an enhancement that does not allow material set names to be renamed to something new. The user should take caution when selecting the appropriate material set.

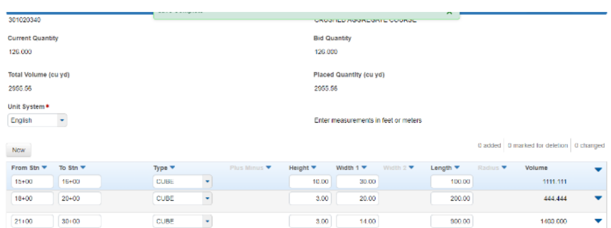
Note: If an incorrect material set is selected and it is locked on a DWR, it will take a minimum of 2 postings to correct the material set. More postings can be needed depending on what corrections are and how many new material sets are needed. It is suggested to verify the correct material set either with the EPM/FOP, plans/Special Provisions, the mix design(s) and the 601 Section.

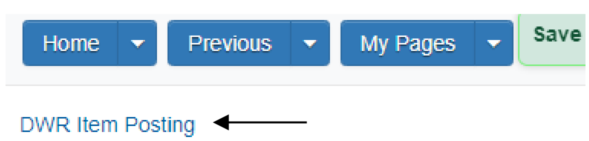


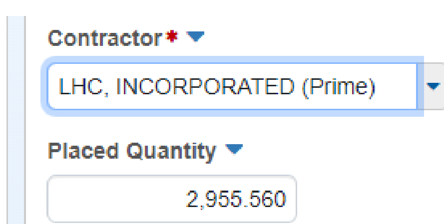
6. Using Agency Views

1. Click the **posting row action arrow**
2. Select the **appropriate Agency View**
   a. The Agency Views are named with MDT
   b. There are bid items that can have multiple Agency Views. Make sure the appropriate agency view is being used

3. Fill in the **information field**
4. Click on the **New** button to add extra rows
5. When all the information is entered, click on the **Save button**.
   a. This will auto-populate the Total Amount to be paid to the Paid Quantity field.
6. Exit the agency view by selecting **the DWR Item Posting quick link** under the home button







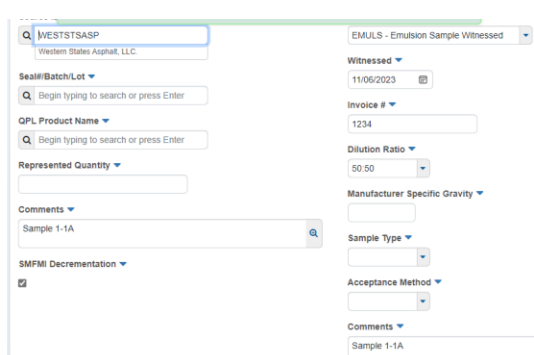
7. Creating a Materials Acceptance Action

Acceptance actions will generate when a material set has been chosen on a posting. It is recommended that the Materials Acceptance Checklist is generated to make sure that the acceptance action has not been completed. These actions will generate for each posting created to that specific material set.

1. Click on the **Acceptance Actions tab**
2. **Select the Material set** that needs to be completed
3. Click on the **>** on the material set row to expand and show the test row.
    a. There could be multiple tests, make sure that the correct material code is being selected and the correct information is being entered.

4. Click on the **>** to expand the test
5. Fill in the **required information**
    a. Information can be found on the Materials checklist for the Field inspection Value. This is based on the Materials Manual 601 section.
6. **Enter any comments in the right-hand box as appropriate**
7. **Save**

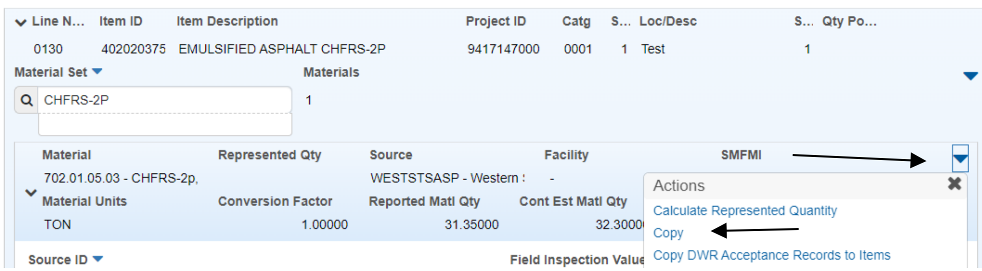
Note: If an item is a QPL item, place your cursor in the **QPL Product Name field** and hit enter. This will bring up the items based on the source that are on the QPL.
Sample Type/Acceptance Method is only used for a sample record that will be created from this section.
If an item is seed, place your cursor in the Seal/batch/lot box and hit enter. In the list, select Seed. Enter in the information for the seed in the comments box on the right.



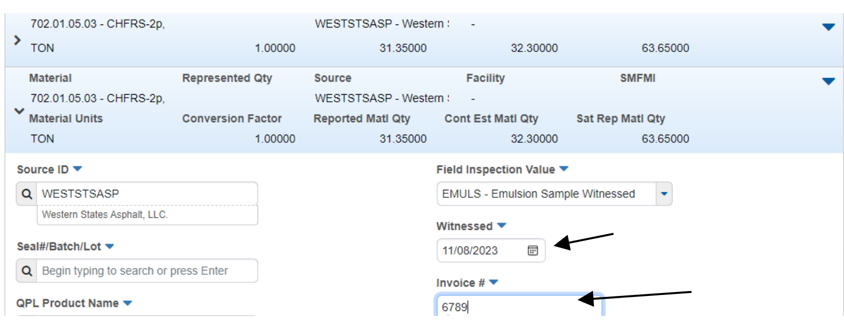
8. Creating a copy of an Acceptance Action in a DWR

Some materials need to have multiple acceptance actions. Items like PG oil & tack for example, will need an acceptance action with each invoice/sample.

1. Navigate to the **Acceptance Actions tab** in the DWR.
2. Click **>** to expand the Row
3. Click on the **>** to expand the correct test
4. Select **the blue row action arrow** on the right of the test row.
5. Select the **Copy** option



7. Expand the **Material set row**
8. Select the **second test row**
9. **Change any information**
    a. Example: Change to the invoice number, change to the sample number, and change to the date that the material was witnessed. (For PG/Tack oils)



10. **Repeat** steps as necessary for the records for the day
11. **Save**

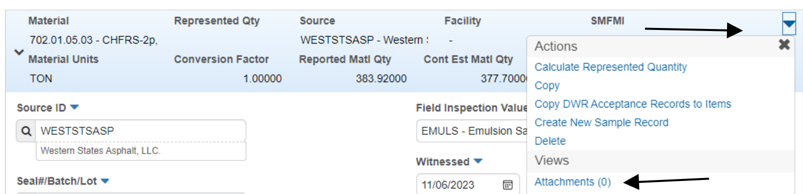
Note: Copy will create a new acceptance record with the same information that it was copied from. It is recommended to open each record and verify for accuracy. Only 20 acceptance records can be completed per posting.

9. Attachments

Attachments should only be placed on the test row in a DWR acceptance action or off the blue component ribbon in the Sample Record Summary only. These will show the certification or other documentation on the reports that the materials reviewers look at.

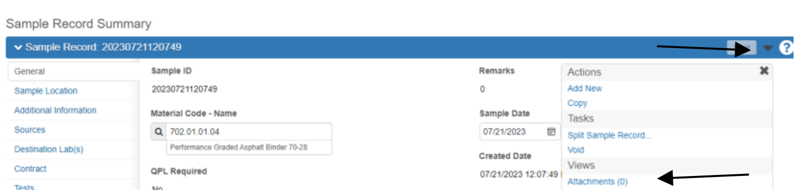
<u>In the DWR</u>:

1. On the test row, select the **row action drop arrow**
2. Click on the **Attachments** link
3. Click on the **Select File**
4. Navigate to the correct file
5. Select **Open**
6. When the file has been uploaded, select **Save**



<u>On a Sample Record</u>:

7. Click on the **white drop arrow on the blue component ribbon**
8. Select the **Attachments** link
9. Select file
10. Navigate to the correct file
11. **Open**
12. **Save** when the file has been uploaded



If uploaded to the correct spot, a blue link will show on the Materials checklist.

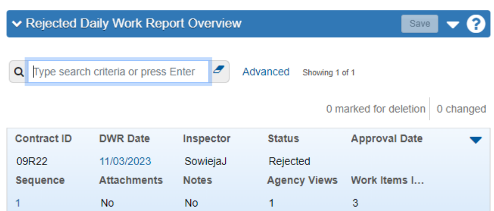
10. Submit a DWR for Approval & Rejected DWR's

In a DWR:

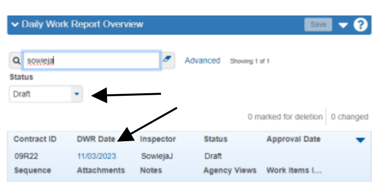
1. Select the **white drop arrow on the blue component ribbon**
2. Select the **Submit for Approval** link

If a DWR has been Rejected:

1. From the Home Dashboard, navigate to the **Rejected Daily Work Report Overview Component**
2. DWR's that have been rejected will show here



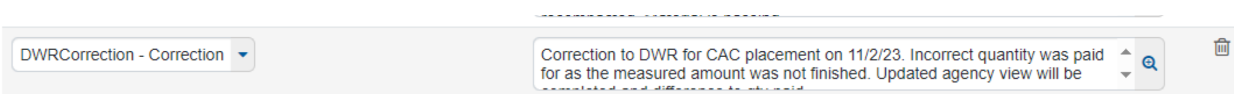
3. Click on the **blue row action arrow**
4. Select **Change to Draft**
5. Navigate to the **Daily Work Report Overview component ribbon**
6. Select the **Status Filter and change to Draft**
   a. This is a great filter as it allows searching for all DWR status for the contracts the user is assigned to.
7. Click on the **DWR date link** to open the DWR for corrections
8. **Save**
9. **Resubmit for approval**



11. Creating a DWR for a Correction when the original has been approved

Each inspector can create 3 DWR's per day.

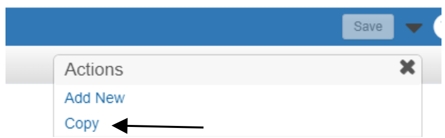
1. Click on **the Daily Work Report** link under the Inspector Component
    a. User can also use the Daily Work Report Overview component
2. Click on the **white drop arrow on the right side** of the component ribbon
3. Click on the **Select Contract to Add DWR**
4. Select the correct contract needed
5. Click on the **Create DWR on Contract**
6. Change the **Date of the DWR**
7. **Save**
8. Scroll to the **Remarks section** at the bottom of the General Tab
9. Select the remark type of **DWRCorrection**
10. **Enter in a remark to what is being corrected**
11. Enter in the Contractor
    a. A contractor is needed for any Work item corrections and Acceptance actions
12. In the On Site field, **select No – Comments Required**
13. Enter a comment in the **Comments** field describing the correction
14. **Save**
15. Navigate to the **Work Items tab**
16. Select the Pay item that needs to be corrected by clicking on the **Select Items button**
17. Make necessary corrections
    a. Comments should be added notating what DWR date, inspector and brief reason to why there is a correction.
18. **Save**
19. Submit for approval when DWR is complete



12. Creating a Copy DWR from an existing DWR

The Copy feature is a great tool when used correctly. It works well when contractors/equipment/personnel are not changing each day.

1. From an existing DWR, click on **the white drop arrow** on the blue component ribbon
2. Select **Copy**

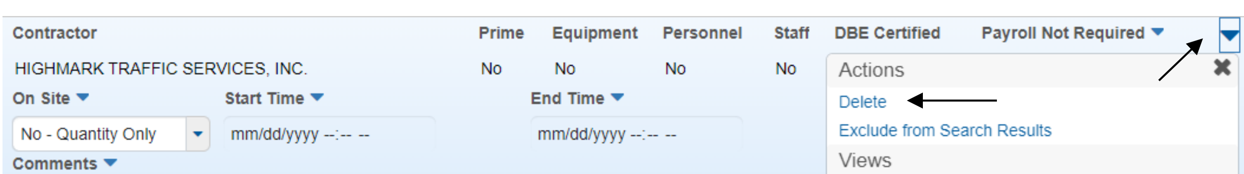


3. This will default to the current date
4. **Save**
5. Fill in the day's information as appropriate

Note: This will copy all information over except remarks from the original DWR used and pay items. It is EXTREMLY important that the user verifies the contractor/Equipment/Personnel/Saff is still correct. If a contractor is not working on the current day, then they will need to be deleted from the DWR. Since contractor information applies to the certified payrolls, it is imperative that the contractors not working are deleted.

<u>To delete a Contractor from a copy DWR</u>:

1. From the contractor row, click on the contractor that needs to be deleted
2. Click on the **blue row action arrow**
3. Select **Delete**
   a. This will turn the row dark gray. It is a double check that the correct contractor is selected
4. **Save**



13. Force Account Work

AASHTOWare gives us the ability to create force accounts. However, it has been noted that it is easier to complete the spreadsheet for force account than to create it in AASHTOWare.

There is a spreadsheet that can be found in the 03_Notes folder for each contract. Use this to document your force account information and payment information. It is important to document everything. Equipment, personnel, and any materials that are being incorporated will need to be documented.

Force account payments will be paid for in a DWR like any normal contract bid item. Verify with the EPM/FOP on the bid item(s) that it should be applied to. Verify that the correct material set is being used for any materials incorporated into the project is sampled properly and any certifications are collected.

The Excel spreadsheets used for documentation purposes can be printed out or worked on via the computer.

STATEMENT OF DAILY FORCE ACCOUNT WORK

Contract Id: 03420 **Project Number:** 9675708000 **Project Desc:** D4 CRACK SEALING - NORTH

Date: **Contractor:** **Subcontractor:**

FA Number **Desc of Work**

LABOR					MATERIALS				
NAME	CLASS	HOURS	RATE	AMOUNT	MATERIAL	UNIT	QUANT.	RATE	AMOUNT
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -	EQUIPMENT		HOURS	RATE	AMOUNT
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
				$ -					$ -
WAGES VERIFIED BY:					ITEM	AMT FWD	LINE TOTAL	ADDITIVE	TOTAL	CUMM
PAYROLL NO(S):					LABOR		$0.00	+ 80%	$ -	$ -
					MATLS		$0.00	+ 15%	$ -	$ -
QUANTITIES VERIFIED BY:					ADMIN ALLOWANCE - LAST DAY OF FA (Y OR N)?				N	$ -
CONTRACTOR			MDT		EQUIP		$0.00	+ 10%	$ -	$ -
					FORCE ACCOUNT TOTAL TO DATE					$-

Notes By: Field Check By:

District Check By: Page (Day) Number 1

CSB109_04_1 Rev. Dec 2011 * Admistrative Allowance Calculated Per Subsection 109.04.2-G

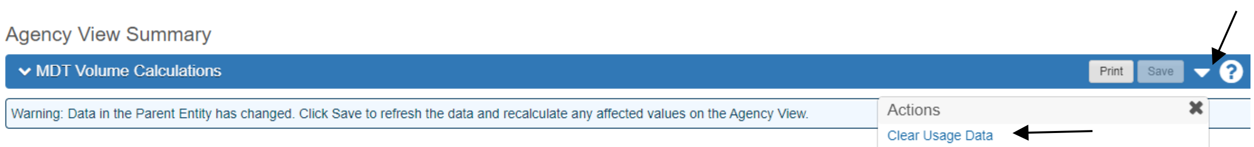
TABLE 109-1	
SUBCONTRACTING ADMINISTRATIVE ALLOWANCES	
EXTRA WORK - SUBCONTRACTOR	ADMINISTRATIVE ALLOWANCE
$0 to $1,000	10%
$1000.01 to $10,000	$100 plus 5% of excess over $1,000
OVER $10,000	$550 plus 3% of excess over $10,000

Verify documentation and force account practices with the crew EPM/FOP.

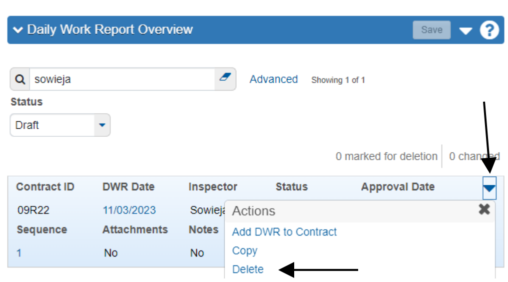
14. Delete a Daily Work Report

AASHTOWare gives us the ability to be able to delete DWR's that were created in error or that are not needed. The following steps will need to be completed in order or it will generate an error.

1. Navigate to the **DWR that needs to be deleted**
2. Click on the **Work Items tab**
3. Expand the **bid item**
4. Click on **the blue row action arrow**
5. Click on **the agency view**, if applicable
6. In the agency view summary, click on the **white drop arrow** on the blue component ribbon
7. Select **Clear Usage Data**
8. This will jump back to the General tab



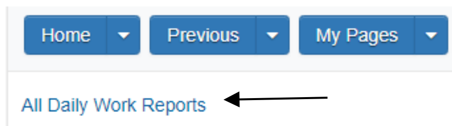
9. Click on the **Work Items** tab
10. Click on the **bid item row action arrow**
11. Select the **Delete** option
    a. This will turn the bid item a dark gray as a second check to make sure you have the correct item
    b. If it is not the correct item, select the undo button in the row
12. **Save**
13. Navigate to **the Home dashboard**
14. Under **the Daily Work Report Overview**, select the correct DWR and click on the row action arrow
15. Select **Delete**
16. **Save**



Note: The DWR can also be deleted from the All Daily Work Reports screen. If the user is in the Daily Work Report by Contract Overview, there is no Save option on the component row to save and complete the action.

From the Daily Work report by Contract Overview

1. Click on the **All Daily Work Reports** quick link under the Home button



2. **Enter in the name of the inspector or the contract number**
3. Navigate the DWR that needs to be deleted
4. Click on the **row action arrow**
5. Select **Delete**
6. **Save**