



AASHTOWare Project Construction

ITD Contractors Construction Management User Guide

Version 2.0

August 2019



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1. Welcome

1.1 Introduction

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

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

2. Getting Started

2.1 Overview of Getting Started


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

Getting Started includes these topics:

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

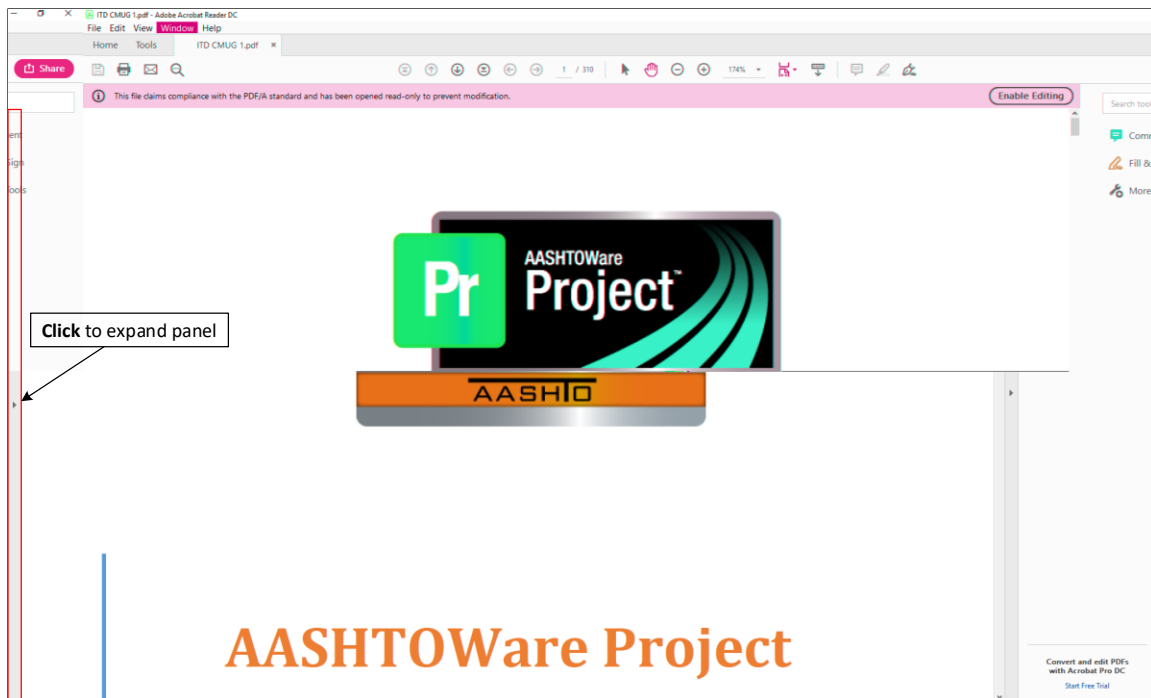
2.2 How to Navigate CMUG in PDF

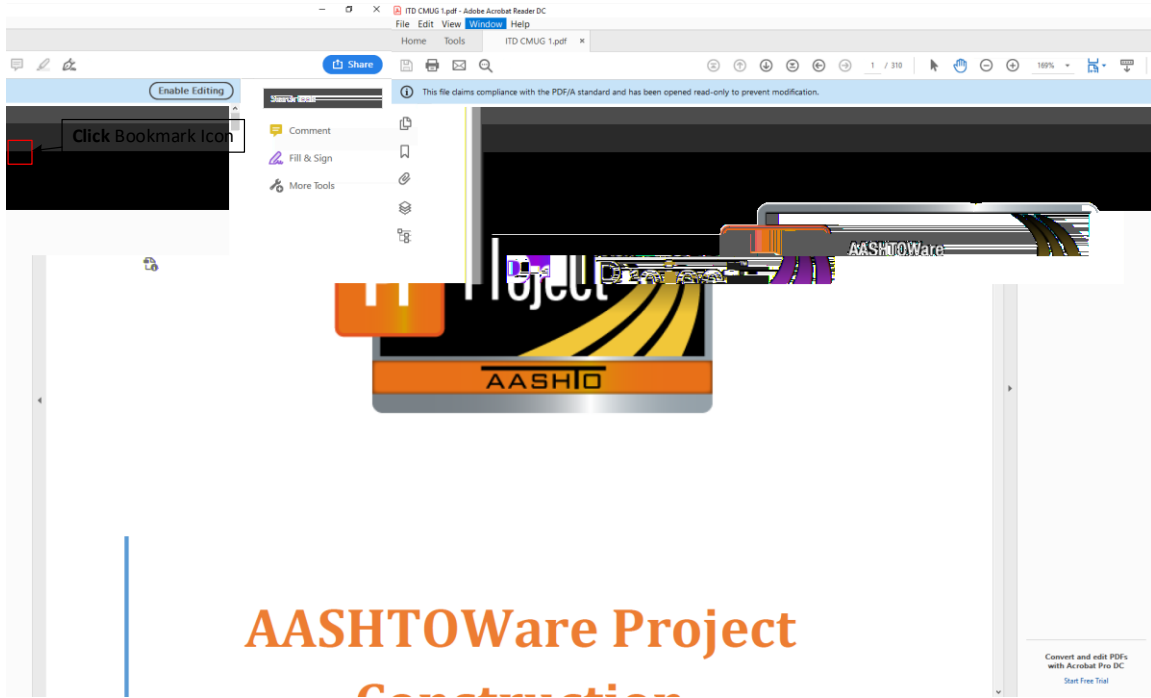
Due to AASHTOWare Construction Management User Guide (CMUG) big file size, navigating the document can be a bit challenge. There are some functions the user can utilize in the PDF application to efficiently navigate CMUG without wasting their valuable time.

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

2.2.1 Enable the Table of Contents

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





2.2.2 Page Navigation Shortcuts

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

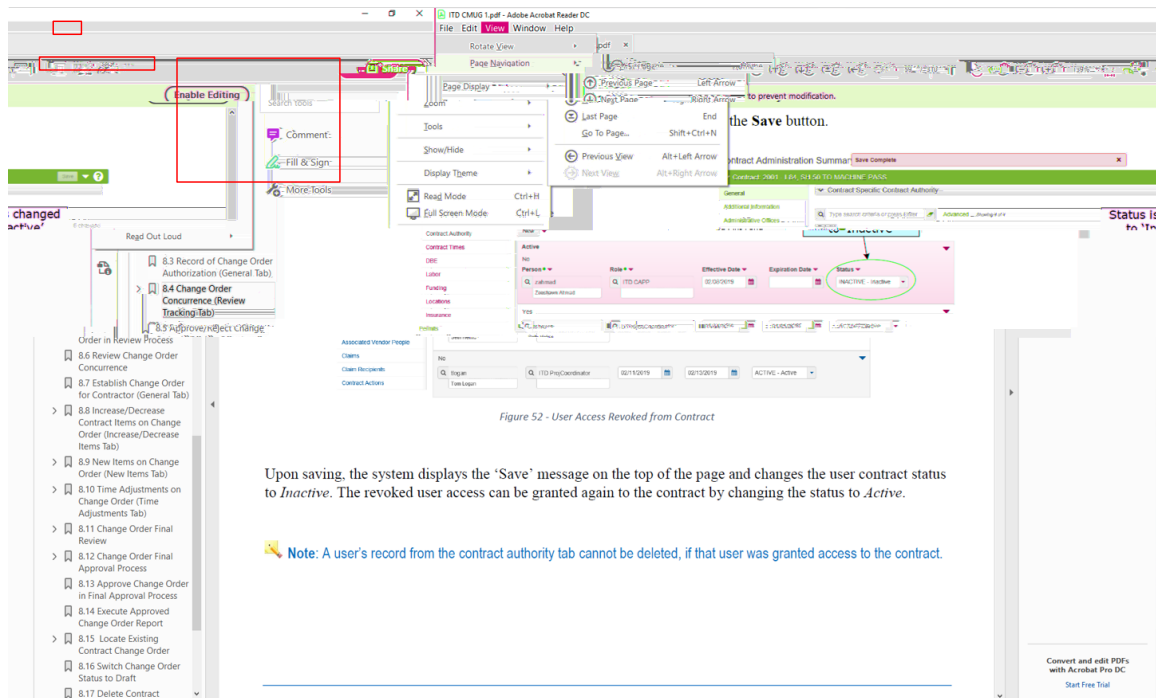


Figure 52 - User Access Revoked from Contract

Upon saving, the system displays the 'Save' message on the top of the page and changes the user contract status to *Inactive*. The revoked user access can be granted again to the contract by changing the status to *Active*.

Note: A user's record from the contract authority tab cannot be deleted, if that user was granted access to the contract.

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


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

To find a specific page in the document, perform **Shift + Ctrl + N**

2.3 ITD Network Account Setup

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

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

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

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

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

2.4 Setting Up Your Browser

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

2.4.1 Internet Explorer 11 Browser Settings

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

2.5 Logging On


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

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

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



Figure 1 - AASHTOWare Project Log On Screen

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

2.6 Logging Off



Figure 2 - AASHTOWare Project Log Off

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

2.7 Familiarize Yourself with User Interface

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

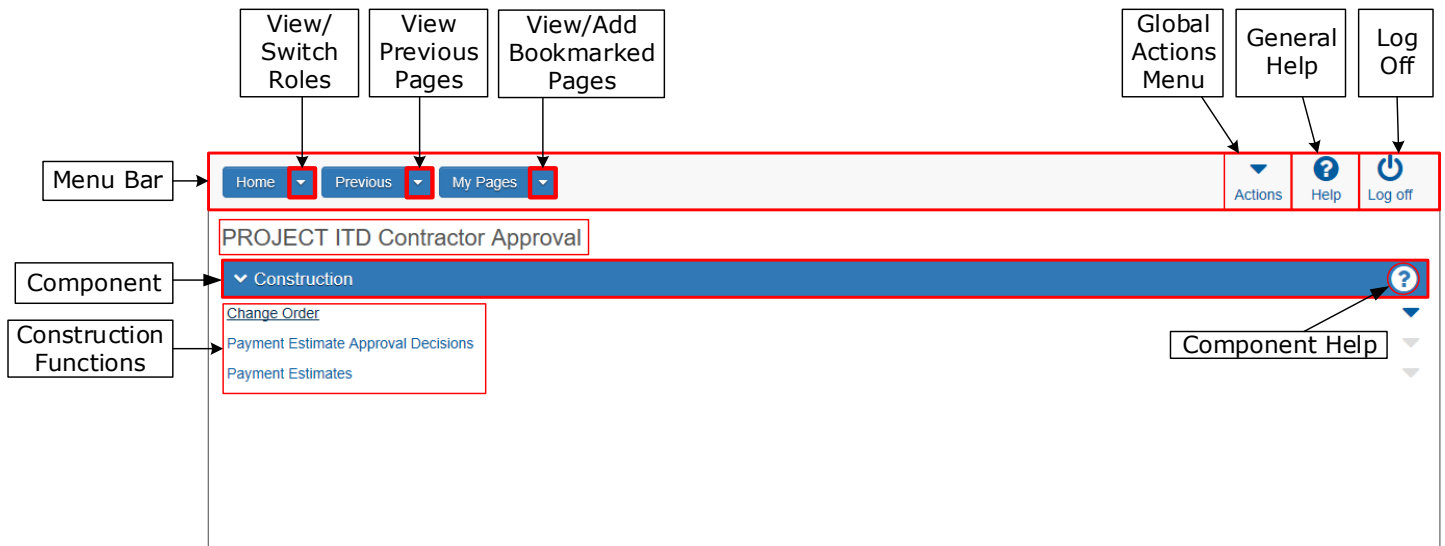



Figure 3 - AASHTOWare Project Dashboard

2.7.1 Menu Bar

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

2.7.2 Construction Component

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

2.8 Using Actions Menus

The screenshot displays the application's navigation and data management interface. At the top, there is a 'Global Actions Menu' button. Below it, a breadcrumb trail includes 'Contract Administration' and 'Contract Materials and Acceptance Actions'. The main content area is titled 'Contract Items' and shows a contract selection dropdown for 'Contract: 2001 - I-84, SH-50 TO MACHINE PASS'. A search bar and 'Advanced' filter options are present. A table lists project items with columns for 'Project - Description', 'Category - Description', and 'Project Item C...'. The table contains one row with 'Proj Item Ln Num' 0005, 'Curr Qty' 1.000, and 'Curr Ext Amt' 50,000.00. Four red callout boxes with arrows point to different action icons: 'Global Actions Menu' (top right), 'Component Actions Menu' (contract dropdown), 'Row Actions Menu' (table row), and 'List Actions Menu' (table cell).

Figure 4 - Four Types of Actions Menus

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

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

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











- **Component Actions Menu** – Clicking this button lets the user perform contract specific functions.
- **Row Actions Menu** – Clicking this button allows the user to perform functions related to individual data on a row.
- **List Actions Menu** – Clicking this button allows the user to perform functions specific to a list below a data row.

Important:

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

2.9 Icons

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

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

3. Change Orders

3.1 Overview of Change Orders

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

Change Orders includes these topics:

- [Review Change Order Report](#)
- [View Change Order Attachments](#)
- [Approve/Reject Change Order](#)

3.2 Review Contractor Change Order Report

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

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

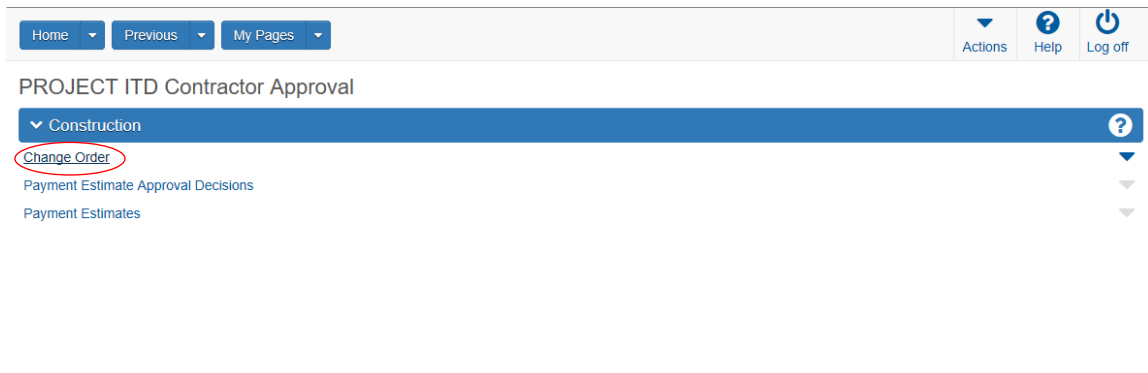


Figure 5 - AASHTOWare Project Homepage

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



Figure 6 - Change Order Overview Page

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

 **Note:** The contractor will only be able to view those contract change orders that they have access to in the system. If they do not see anything, then please reach out to the residency Project Coordinator or the Resident Engineer.

Change Order Overview

▼ Change Order Overview Save ?

Q 8280 Advan

Note: Your approval will only be required on those change orders where the status will be 'Pending Approval'.

0 marked for deletion | 0 changed

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

Figure 7 - Change Order Overview Page

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

Contract Change Order Summary

▼ Contract: 8280 - US 20, INT FARMWAY RD

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

Approval Tracking

Note: Do NOT make a decision before reviewing the change order!

Component **Actions** Menu

Click here to generate the report

Approval Group	Round
1 - Contractor Approval Group	1
Decision Requested	Decision Provided
03/26/2019	

Showing 2 of 2

- Actions
- Add New
- Tasks
- Approve...
- Reject...
- Views
- Attachments
- Issues
- Links
- Reports
- Contractor Char
- Historical Rej
- Change Order F

Figure 8 - Contract Change Order Summary Page

- To review the changes proposed by ITD on the change order, select **Contractor Change Order Report** from the component **Actions** menu.

Generate Report

Generate Report - Contractor Change Order Report Execute ?

Settings Output Options 4 of 5

Output Type

Generate as PDF

Download PDF

Generate as HTML

Generate Available Data Output

Report Layout Source

Base

Custom


Test

Don't change this option

Figure 9 - Generate Report

5. To generate the report and view online as PDF, then select **Generate as PDF** option as the **Output Type**. (This will be selected by default.)
6. To download the report as PDF, then select **Download PDF** option as the **Output Type**.
7. Always choose 'Custom' as the **Report Layout Source**. (This will be selected by default. Don't change this option.)
8. Click the **Execute** button to generate the report.

CONTRACTOR CHANGE ORDER REPORT EXAMPLE

 <p>Idaho Transportation Department</p> <p>Contract: 8280, US 20, INT FARMWAY RD</p> <p>CO Number: 0006</p> <p>CO Status: Draft</p> <p>Entered By: Shawna King</p>	<p>Change Order</p> <p>Revision No.: 1</p> <p>Change Order Date: 2/7/2019</p> <p>Last Updated By: Shawna King</p> <p>Fed. Proj. No.: A018(852)</p> <p>Route: US 20/26</p> <p>Location: US 20/26 Intersection Farmway Rd., Canyon County</p> <p>Project(s): 18852, US 20, Int Farmway Rd</p>	<p style="text-align: right;">03/05/2019 11:21:24</p> <p style="text-align: right;">AASHTOWare Project v3.01.164.01</p> <p style="text-align: right;">Report v1</p> <p>Prime Contractor: 10019, STAKER & PARSON COMPANIES dba IDAHO MATERIALS & CONSTRUCTION</p> <p>CO Type: Change in Plans</p> <p>CO Approval Date:</p> <p>Last Updated Date: 2/7/2019</p> <p>Awarded Contract Amount: \$405,157.00</p> <p>Net CO Amount: \$24,044.09</p> <p>County: C014 Canyon</p>
--	--	--



This is the section where the actual change order is documented. Review this section carefully as it states the work that the Contractor is required to perform.

:00:00
AASHTOWare Project v3.01.164.01

Idaho Transportation Department

Change Order

Report v1

Description: You are ordered to perform the work described or incorporated below in accordance with the Contract or as amended by this change order. The cost to perform this work includes all labor, equipment, materials, overhead, and all other incidental costs associated with completing the work.

Description of Work If no description is provided herein, the work description found in other accompanying documents is incorporated by this reference. Further, even if a description is provided herein, the work description in other accompanying documents is incorporated by this reference.

CHANGE IN PLANS

1. Description: Remove the current striping configuration for a painted barrier island and restripe traffic lines to allow a left turning movement from US20 Westbound onto Kent Ranch Road and a left turning movement from US20 Eastbound into the Stinker approach from US20. Install signs at each end of the center turn lane and thermoplastic turn lane use arrows within the center turn lane.

2. Materials: Materials shall meet the requirements of Standard Specification Sections 630, 616 and 203.

3. Construction Requirements: Obliterate the conflicting pavement markings and reconfigure the striping to accommodate turning movements within this section of roadway from Station 63+00 to 65+50 on US20, add two Thermoplastic arrows in center turn lane and install two R3-10 signs at Stations 63+22 Rt. and 65+88 Lt. per attached drawing. Pavement Markings and Thermoplastic shall meet the requirements of Standard Specification section 630. Permanent signs shall meet the requirements of section 616. Obliteration of Pavement Markings shall meet specifications of section 203.C.

4. Method of Measure: Contract items 203-130A Obliteration of Pav Markings, 630-025A Longitudinal Pavement Markings-Waterborne, 630-020B Pavement Markings-Preformed Thermoplastic, 616-010A Signs Ty B, and 616-050A Breakaway Steel Sign Post Ty E are being increased for this work and will be paid at established contract pricing.

Traffic control items will be paid under existing items at contract pricing.

Item CO4-S904-05G Mobilization-will be paid by the Lump Sum.

Item CO4-S900-50H Prime Overhead & Profit will be paid by Contingency amount per section 109.

5. Pricing: See pricing below.

6. Contract Time: 2 working days will be added for this work

Contract: 8280

CO Number: 0006 Revision No.: 1

Page: 2 of 5



Idaho Transportation Department

03/05/2019 11:21:24

AASHTOWare Project v3.01.164.01

Change Order

Report v1

Increases/Decreases

Item Description	Item ID	Project Line	Contract Line	Project	Category	Item Source	Quantity Inc/Dec	Unit	Unit Price	Dollar Amount				
BRKAWY STL SIGN POST TY E	616-050A	0120	0120	18852	0001	Original	95.000	LB	\$5.25	\$498.75				
Explanation:														
FLAGGER CONTROL	626-120A	0170	0170	18852	0001	Original	16.000	HR	\$35.00	\$560.00				
Explanation:														
LONGITUDINAL PAVEMENT MARKING- WATERBORNE	630-025A	0172	0185	18852	0001	Original	194.000	FT	\$0.11	\$21.34				
Explanation:														
\$661.50					OBLITERATION OF PAV MARKINGS	203-130A	0015	0015	18852	0001	Original	630.000	FT	\$1.05
Explanation:														
\$10.25	\$328.00				PAVEMENT MARKINGS-PREFORMED THERMOPLASTIC	630-020B	0180	0180	18852	0001	Original	32.000	SF	\$22.000
Explanation:														
\$30.75	\$19,372.50				SIGN BRACKETS & BRACE ANGLES	616-035A	0115	0115	18852	0001	Original	630.000	LB	\$30.75
Explanation:														
\$20.50	\$246.00				SIGNS TY B	616-010A	0110	0110	18852	0001	Original	12.000	SF	\$20.50
Explanation:														

Page: 3 of 5

Contract: 8280

CO Number: 0006 Revision No.: 1



Change Order

Report v1

Item Description	Item ID	Project Line	Contract Line	Project	Category	Item Source	Quantity Inc/Dec	Unit	Unit Price	Dollar Amount
TRAFFIC CONTROL MAINTENANCE	626-105A	0152	0165	18852	0001	Original	4.500	HR	\$38.00	\$171.00
Explanation:										
Total: \$21,859.09										

New Items

Item Description	Item ID	Project Line	Contract Line	Project	Category	Item Source	Quantity	Unit	Unit Price	Dollar
CONTINGENCY AMOUNT, CO4 Prime Overhead and Profit	S900-50H	8055	280	18852	0001	ChangeOrder	285.000	CA	\$1.00	\$285.00
Explanation:										
SP, CO4 Mobilization - TC sub	S904-05G	8060	290	18852	0001	ChangeOrder	1.000	LS	\$700.00	\$700.00
Explanation:										
SP, CO4 Mobilization	S904-05H	8065	285	18852	0001	ChangeOrder	1.000	LS	\$1,200.00	\$1,200.00
Explanation:										
Total: \$2,185.00										

Time Adjustments

Time ID	Time Description	Time Type	Original	Current	Adjustment	New
00 AT	US 20, INT FARMWAY RD	Available Time	26	48	2	48
Explanation:						

Contract: 8280

CO Number: 0006

Revision No.: 1

Page: 4 of 5



Change Order

Report v1

Project/Category Summary

Project	Project Description	Category	Category Description	Dollar Amount
18852	US 20, Int Farmway Rd	0001	Work by Contract A018(852)	\$24,044.09
Net Change Order Amount:				\$24,044.09

Approvals

Date/Time Approved	Approval Decision	Name	Title	Approval Decision Group
				Contractor Approval Group
				Resident Engineer Approval Group

On the last page of the report, the Approvals section will be visible. In this section, you can view the approval groups on this change order. Once you approve the change order, the date/time stamp will be populated under the **Date/Time Approved** field along with **Approval Decision, Name, and Title**.

Contract: 8280

CO Number: 0006

Revision No.: 1

Page: 5 of 5

3.3 View Change Order Attachments

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

To view change order attachments, follow these steps:

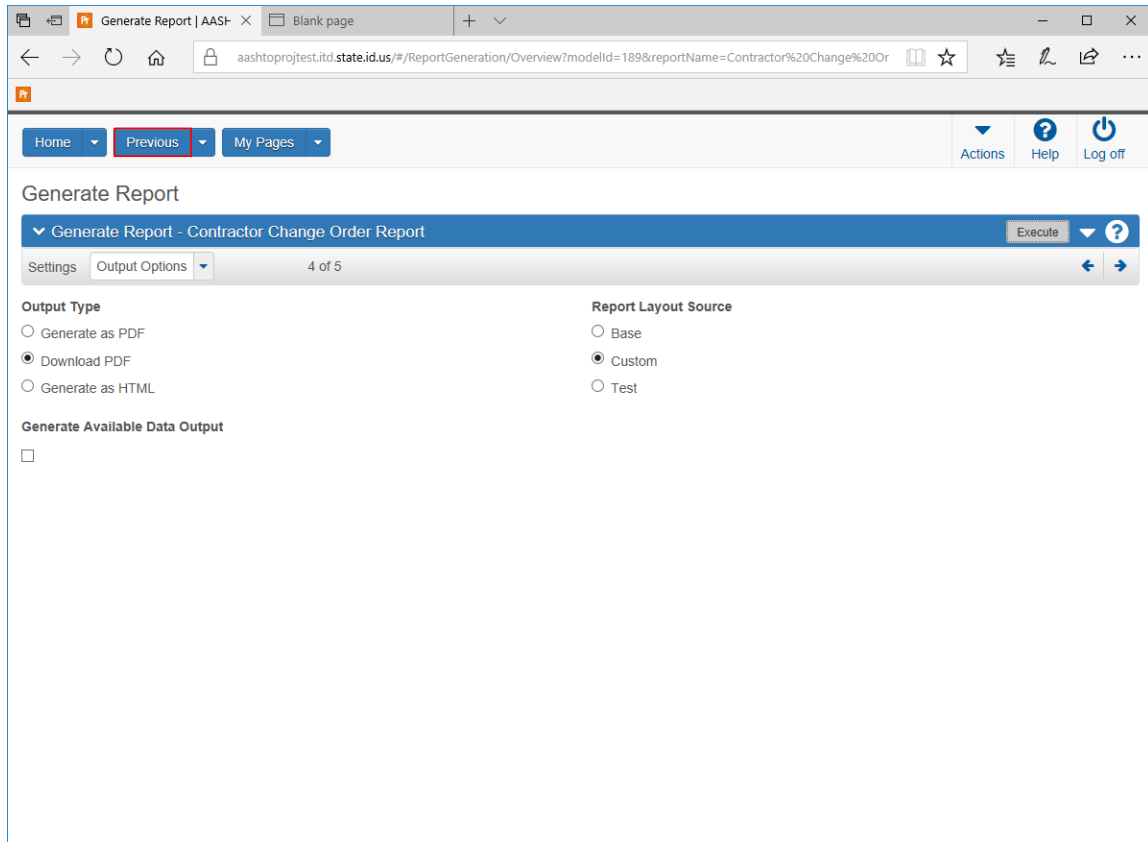


Figure 10 - Generate Report Page

1. On the *Generate Report* page, click the **Previous** button on the menu bar.

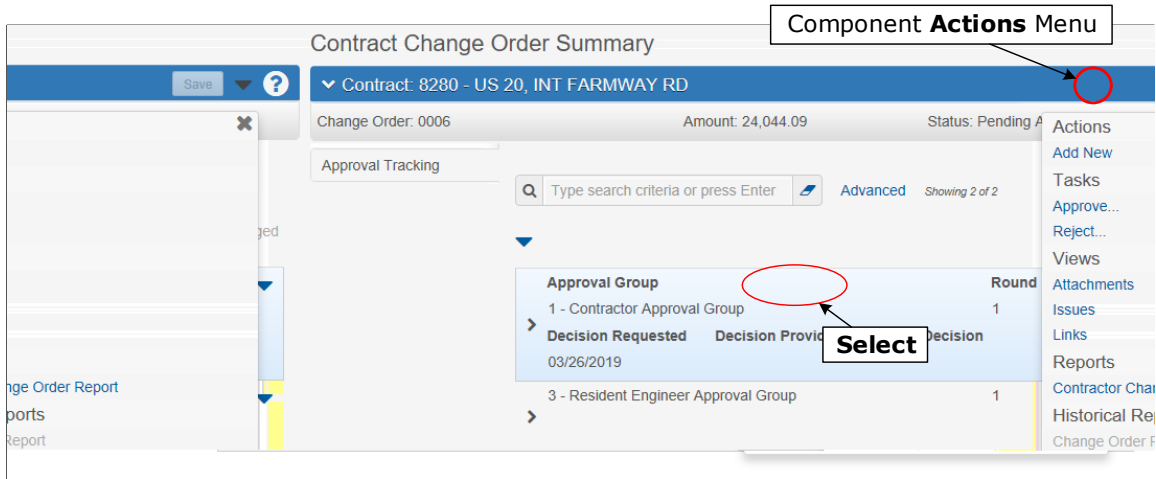


Figure 11 - Contract Change Order Summary Page

2. On the *Contract Change Order Summary* page, select **Attachments** from the component **Actions** menu.



Figure 12 - Attachment Overview Page

3. If there is a document attached to the change order, then click on the **Name** hyperlink to download and view the attachment.

3.4 Approve/Reject Change Order

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

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

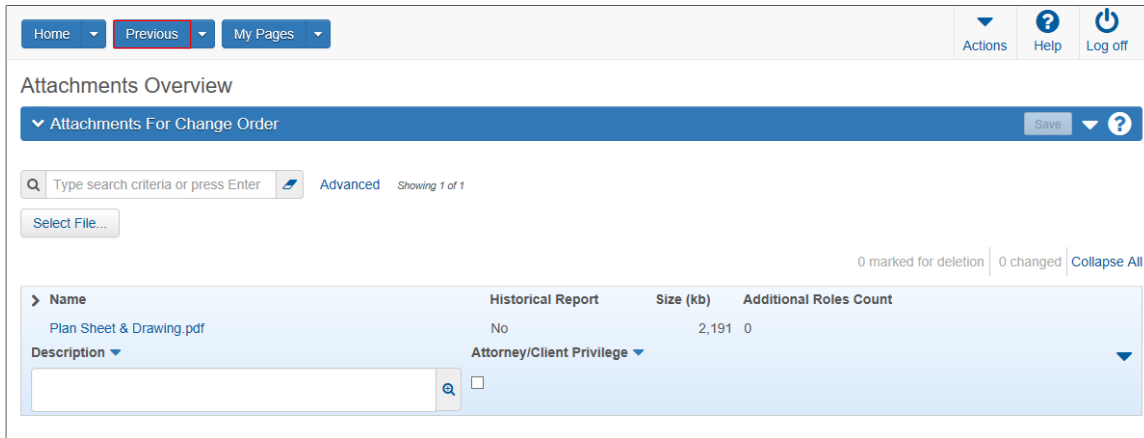


Figure 13 - Attachment Overview Page

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

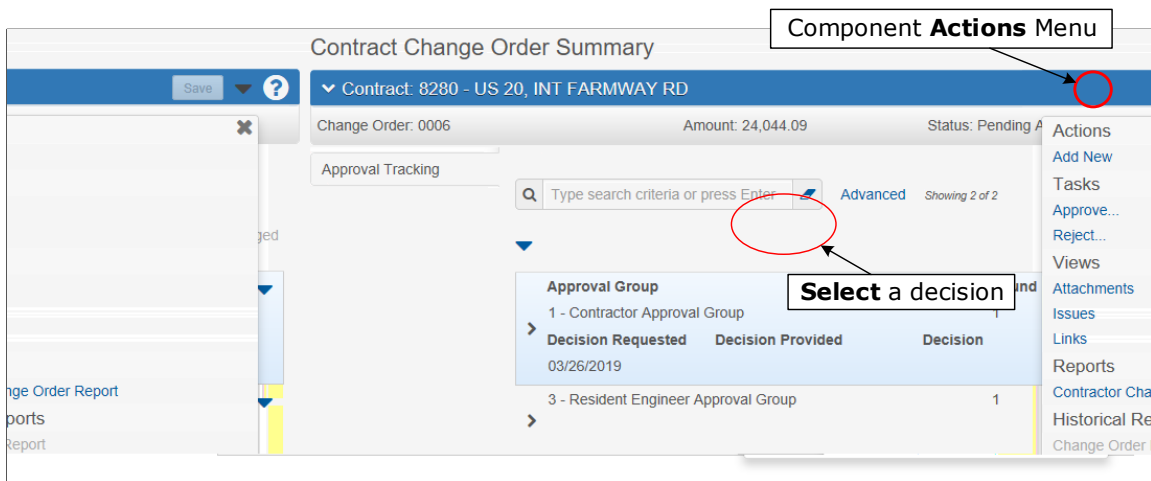


Figure 14 - Contract Change Order Summary Page

2. On the *Contract Change Order Summary* page, select the following decision from the component **Actions** menu:
 - a. If approving the change order, then select **Approve**.
 - b. If rejecting the change order, then select **Reject**.

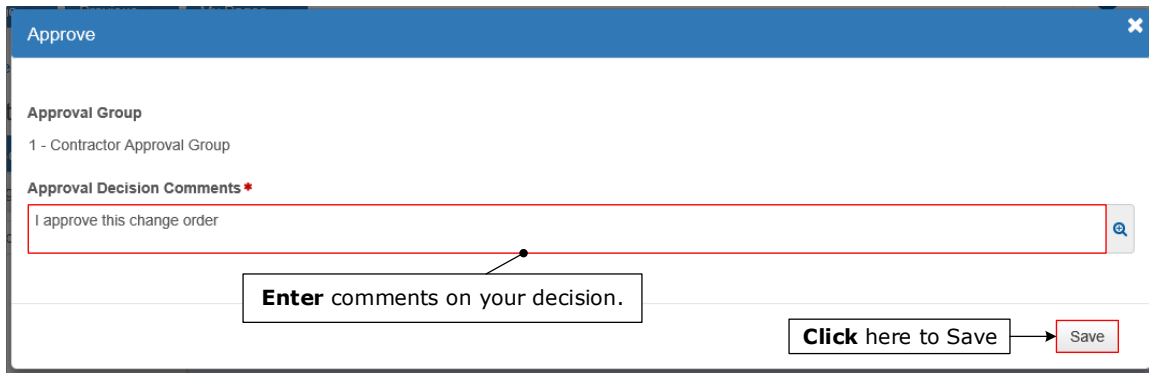


Figure 15 - Approve/Reject Decision Window

3. In the *Approve* or *Reject* window, enter comments on your respective decision. (Max 256 Characters.)

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

4. Click the **Save** button.

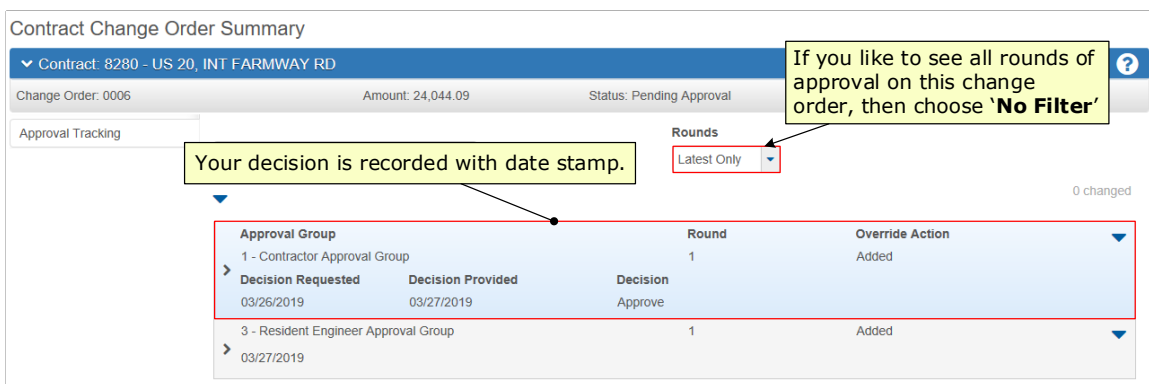


Figure 16 - Change Order Approval Tracking

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

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

4. Payment Estimates

4.1 Overview of Payment Estimates

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

Payment Estimates includes these topics:

- Review Payment Estimate Report
- Approve Final Payment Estimate

4.2 Review Payment Estimate Report

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

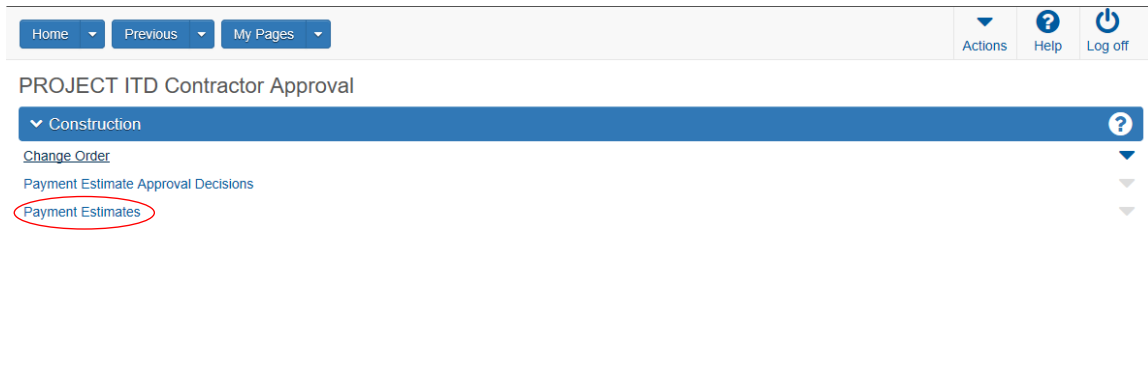


Figure 17 - AASHTOWare Project Homepage

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

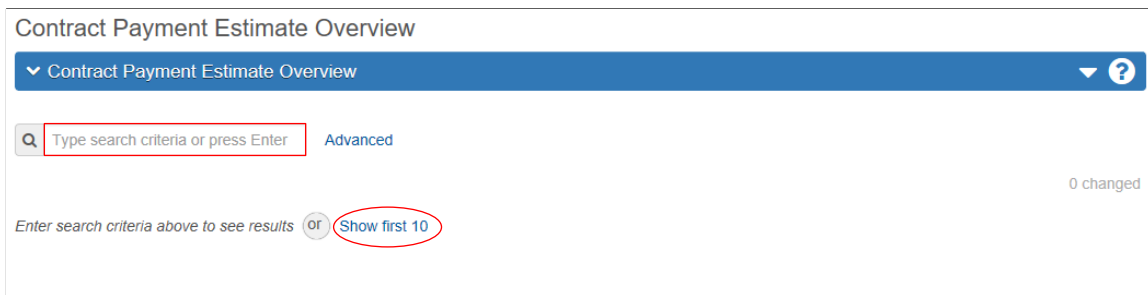



Figure 18 - Contract Payment Estimate Overview Page

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

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

Contract Payment Estimate Overview

Contract Payment Estimate Overview

Q 2001 Advanced Showing 2 of 2 0 changed

Contract ID	Number	Status	Exceptions	Current Pay Amount
2001	0002	Draft	Yes	8,496.90
Type		Period End Date		
Progress		03/21/2019 4:23:42 PM		
2001	0001	Approved	Yes	50,200.50
Progress		04/10/2018 3:43:29 PM		

Figure 19 - Contract Payment Estimate Overview Page

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

Contract Payment Estimate Summary

Payment Est Num: Period End Date: Type: Status:

General Pay Amount This Contract Payment Estimate

Component Actions Menu

Attachments

Issues

Links

Reports

Insufficient Materials Report

ITD Payment Estimate for Contractor

Items with Unpaid Placed Quantities

Summary By Project Report

Historical Reports

Select

Prime There are no actions available.

Notes

Exceptions

Time Charges

Projects

Items

Contract Adjustments

Item Adjustments

Approval Tracking

Total Pay Amount (All Payment Estimates)

784,482.50

Transfer to Accounting Date

05/29/2018

Accounting Received Date

Transaction Number

Transaction Date

Figure 20 - Contract Payment Estimate Summary Page

4. On the *Contract Payment Estimate Summary* page, select **Summary By Project Report** report from the component **Actions** menu.

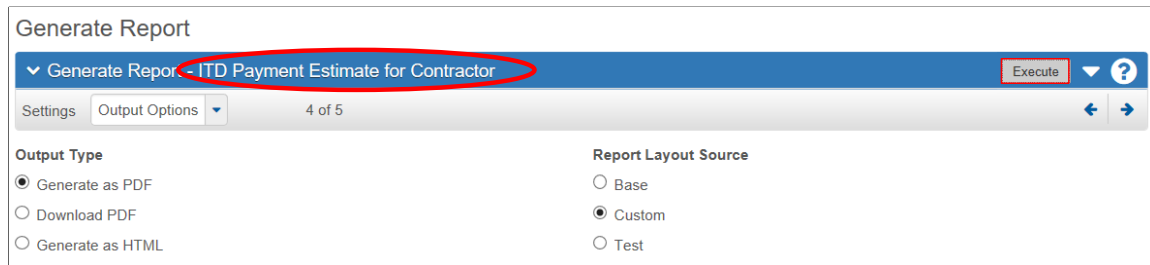


Figure 21 - Generate Report Page

5. To generate the report and view online as PDF, then select **Generate as PDF** option as the **Output Type**. (This will be selected by default.)
6. To download the report as PDF, then select **Download PDF** option as the **Output Type**.
7. Always choose '**Custom**' as the **Report Layout Source**. (This will be selected by default. Don't change this option.)
8. Click the **Execute** button to generate the report.

4.3 Approve Final Payment Estimate

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

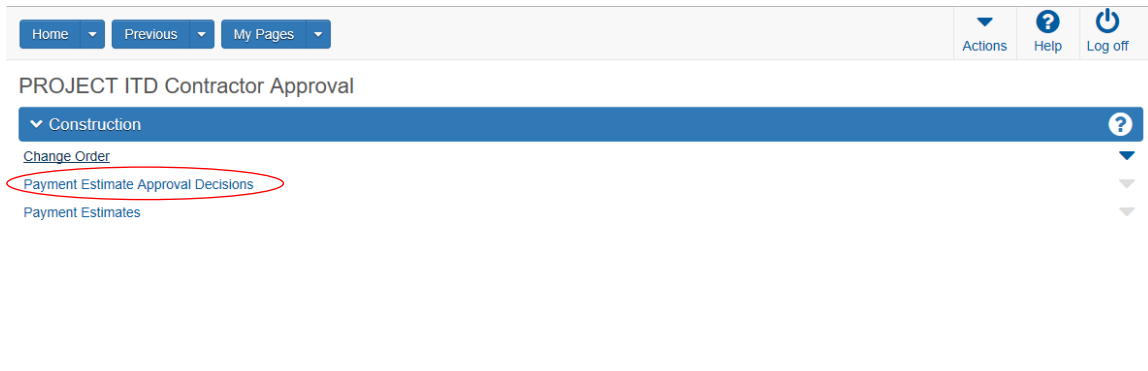


Figure 22 - AASHTOWare Project Homepage

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

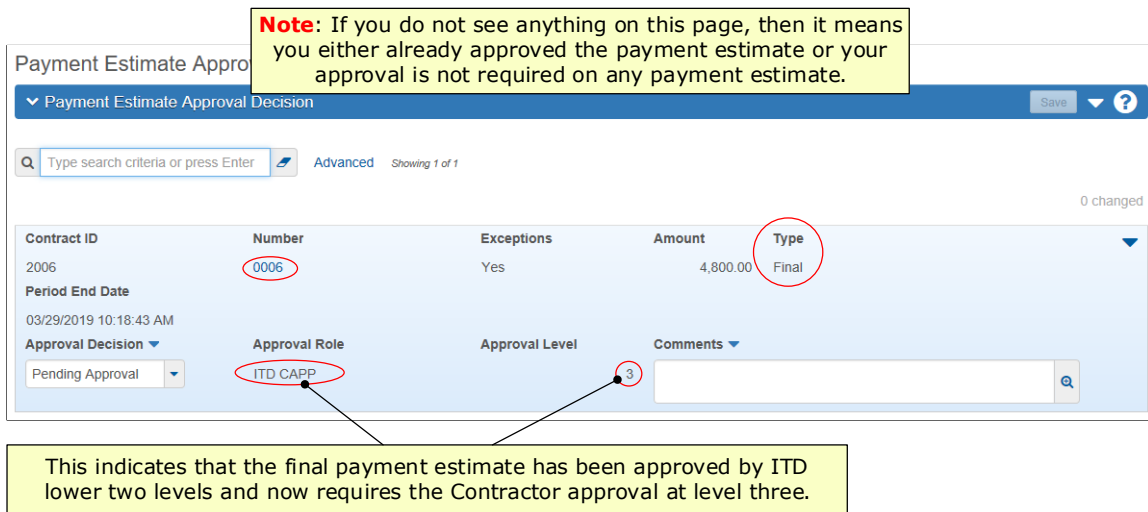


Figure 23 - Payment Estimate Approval Decision Overview Page

2. On the *Payment Estimate Approval Decision Overview* page, click the **Number** hyperlink to open the payment estimate for review.

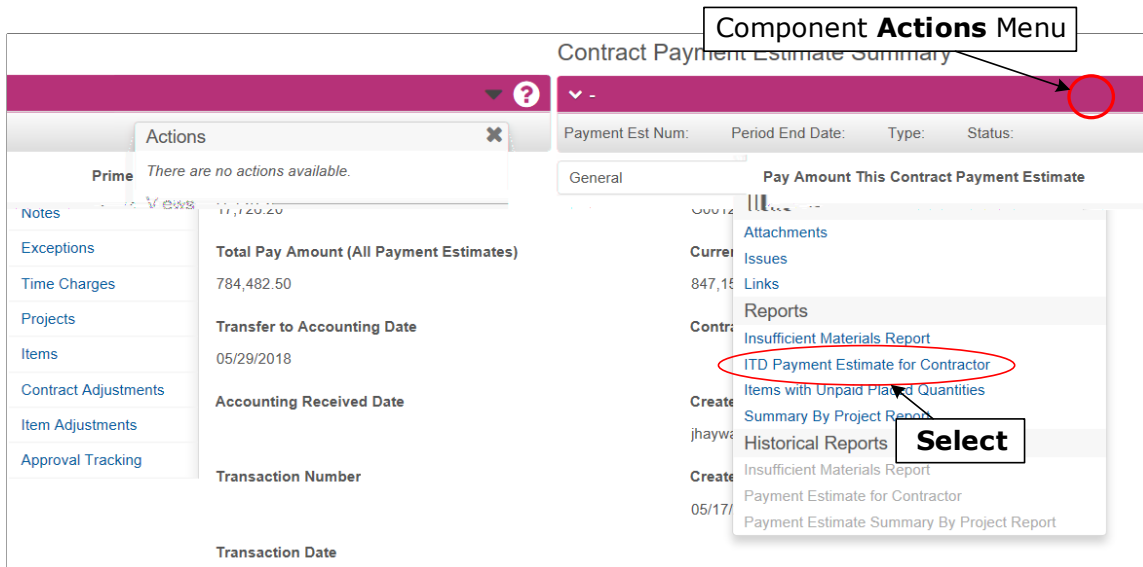


Figure 24 - Contract Payment Estimate Summary Page

- On the *Contract Payment Estimate Summary* page, select **Summary By Project Report** report from the component **Actions** menu.

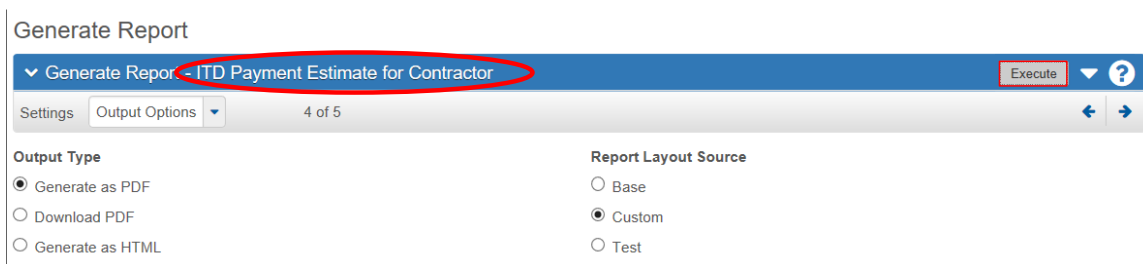


Figure 25 - Generate Report Page

- To generate the report and view online as PDF, then select **Generate as PDF** option as the **Output Type**. (This will be selected by default.)
- To download the report as PDF, then select **Download PDF** option as the **Output Type**.
- Always choose '**Custom**' as the **Report Layout Source**. (This will be selected by default. Don't change this option.)
- Click the **Execute** button to generate the report.
- Review the 'Payment Estimate for Contractor' Report.

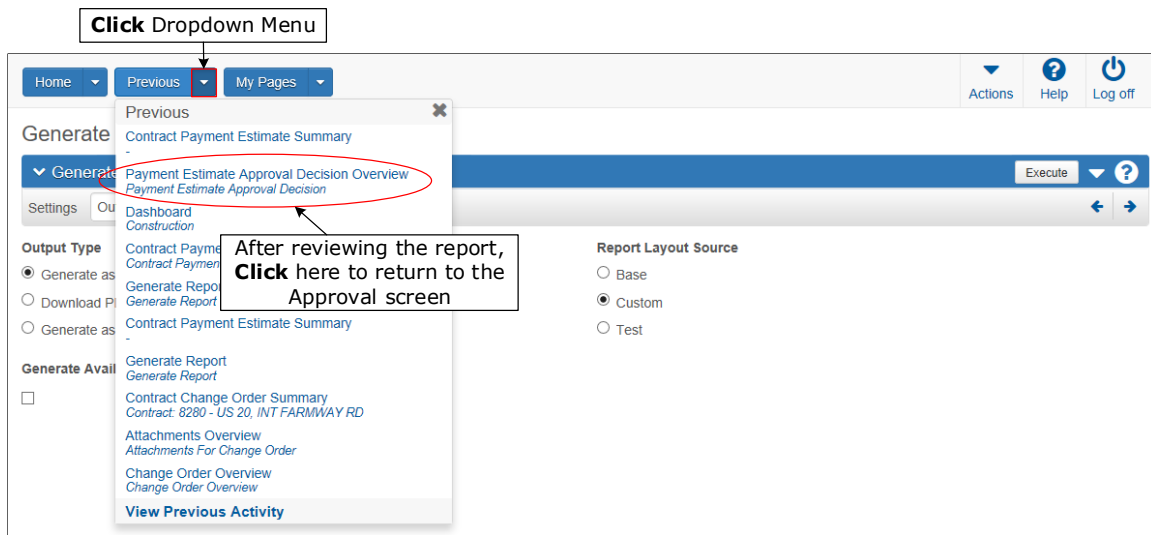


Figure 26 - Generate Report Screen

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

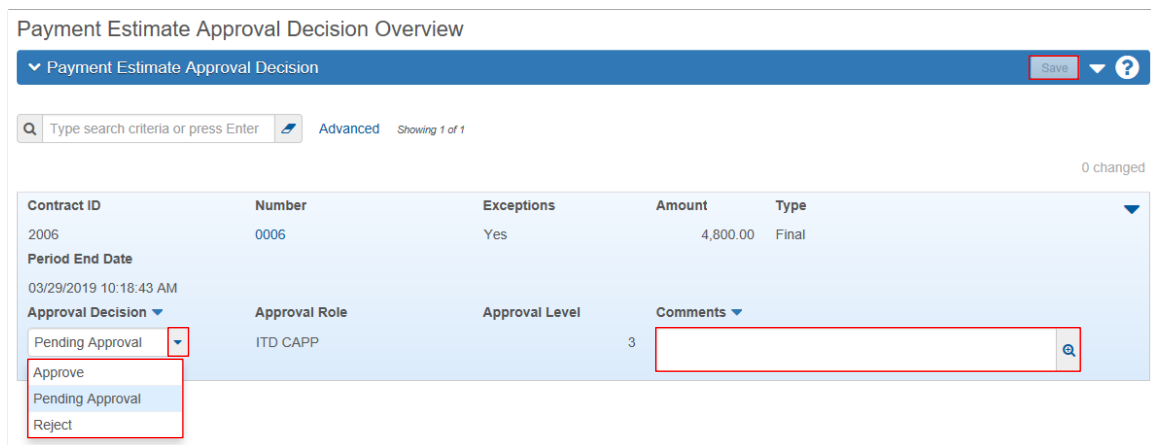


Figure 27 - Payment Estimate Approval Decision Overview Page

- Select your decision (**Approve** or **Reject**) from the **Approval Decision** dropdown menu.
- Enter comments in the **Comments** field. *(This is an optional field.)*
- Click the **Save** button. *(Upon saving, the payment estimate approval decision row disappears.)*

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