# OKLAHOMA DEPARTMENT OF TRANSPORTATION

### CONSTRUCTION DIVISION / TRNS*PORT BRANCH

# Sitemanager Policy Manual

## DAILY WORK REPORTS

## TALE OF CONTENTS

| 0501.0 | **DAILY WORK REPORT** |
| --- | --- |

## SCOPE

To establish a policy and procedure for utilizing the Daily Work Reports window.

## GENERAL

A Daily Work Report (DWR) is a record of construction activity. A Daily Work Report (DWR) should be completed for each day of the contract by the residency designated project manager of the contract, beginning no later than the effective date of the work order. Inspectors should complete DWR's for each day the contractor performs work on the contract. The Auditor or the Residency Administration may create a DWR to note corrections and adjustments to pay items.

Inspectors and Project Managers may create Daily Work Reports in either Standalone or Server mode. The Residency Auditor, Assistant Resident Engineer/ Branch Manager, and Resident Engineer/Branch Manager should create Daily Work Reports on the Server.

## TYPE OF USE:

Daily Work Reports may be created in either Standalone or Server mode of SiteManager. If a user is working in server mode, the user is directly connecter with the server. If the user is working in standalone mode, the user must Pipeline the Daily Work Reports to server mode before the Daily Work Reports may be included on a Diary or Estimate.

Inspectors and Project Managers may create Daily Work Reports in either Standalone or Server mode.

The Residency Auditor, Assistant Resident Engineer/Branch Manager, and Resident Engineer/Branch Manager should create Daily Work Reports on the Server.

## SCREENSHOTS



| TEMPERATURE AND WEATHER INFORMATION : | High Temperature will be recorded as the highest temp. in a 24 hour period beginning at 12:01 a.m. (MIDNIGHT) for the above date. |
|---|---|
| | Low Temperature will be recorded as the lowest temp. in a 24 hour period beginning at 12:01 a.m. (MIDNIGHT) for the above date. |
| | Weather information for AM and PM condition shall be chosen from a pre-approved list. Night Work will split the work according to time of day. |
| | The highest temperature and the lowest temperature recorded on all Daily Work Reports for the day will be transferred to the Time and Diary Record. Refer to the Contract Time Adjustment window for additional information regarding the Time and Diary Record. |

| 0501.1 | DAILY WORK REPORT |
|---|---|

## DEFAULT VALUES

| WORK SUSPENDED : | As outline in control Directive 990512, ODOT will not suspend time. |
|---|---|
| REMARKS : | The following is a list of remarks that that may be recorded on a Daily Work Report. |

| REMARK TYPE | REMARK DESCRIPTION |
|---|---|
| Accidents | Record information on accidents that occurred within the Contract limits. Include the station, time, officer, the agency, and a brief description of the accident. |
| Delay | Record any event that would cause the contractor delay in work activities. Example: Rainfall caused sub-grade to become unworkable. |
| General Remarks | Record observations on the Contract site that do not apply to any other category. |
| Instructions. | Record information on any orders that were received that day |
| Personnel Remark | Record information pertaining to project personnel. |
| Prime Contractor Work | Record information about work performed by the Prime Contractor. |
| Site Conditions | Record Surface conditions (Dry or Muddy) and the amount of rainfall that has been received. |
| SubWork | Record information about work performed by the sub-contractors. |
| Supervisors | Record information pertaining to project supervisors. |
| Type of Day | Record information in accordance with Spec Book section 108.07(b). |
| Unapproved Work | Record work performed that is not approved. |
| Visitors | Record visitors to the construction site. |

## DEFAULT VALUES



| CONTRACTORS : | The prime contractor and all approved subcontractors will appear in the Contractor drop-down list in the top focus of the window. When a Daily Work Report is created, the user should select each Contractor that is on the construction site for the day for which the Daily Work Report is created. For example, if the prime contractor and two subcontractors were performing work, then all three contractors should be listed on the Daily Work Report. |
|---|---|
| SUPERVISORS : | All supervisors and foremen for each contractor on the construction site along with the total number of hours worked should be recorded in the Supervisor section on the Contractor folder tab in Daily Work Reports. Remarks pertaining to either the supervisor or foreman may be recorded in the Remarks bubble located on the tool bar. If neither a supervisor or foreman is listed in the drop-down list for the contractor, then Inspectors should contact Residency Office Personnel. The Residency Office Personnel should verify that the supervisor and foreman selections have been added to the Contract Master List. The Residency Office Personnel should contact SiteManager Support if they are unable to add a supervisor or foreman to the Contract Master List. Refer to Contract Master List for addition information regarding adding supervisors to the master list. |

### DEFAULT VALUES

| PERSONNEL TYPES : | All personnel types for each contractor on the construction site along with the total number of persons and hours worked for each for each personnel type should be recorded in the Personnel Type section on the Contractor folder tab in Daily Work Reports. If a multiple number of persons classified as the same personnel type worked, record the average number of hours worked in the Hours Worked field. For example if two Backhoe Loaders were on the construction site and one backhoe loader worked for 8 hours and one worked for 4 hours, type 6 in the Hours Worked field. If additional information is necessary, it may be recorded in the Remarks bubble located on the tool bar. |
|---|---|
| | If personnel types are not available in the drop-down list for the contractor, then Inspectors should contact Residency Office Personnel. The Residency Office Personnel should verify that the Personnel Type selections have been added to the Contract Master List. The Residency Office Personnel should contact SiteManager Support if they are unable to add a Personnel Types to the Contract Master List or if new Personnel Types are required. Refer to Contract Master List for addition information regarding adding Personnel Types to the master list. |

## DEFAULT VALUES



All equipment for each contractor on the construction site should be recorded in the Equipment ID—Description section on the Contractor Equipment folder tab in Daily Work Reports. The number of pieces on the construction site, the number of pieces used, and the number of hours the equipment was used should also be recorded.

If equipment is not available in the drop-down list for the contractor, then Inspectors should contact Residency Office Personnel. The Residency Office Personnel should verify that the Equipment selections have been added to the Contract Master List. The Residency Office Personnel should contact SiteManager Support if they are unable to add Equipment to the Contract Master List or if new Equipment types are required. Refer to Contract Master List for additional information regarding adding Equipment to the Contract Master List.
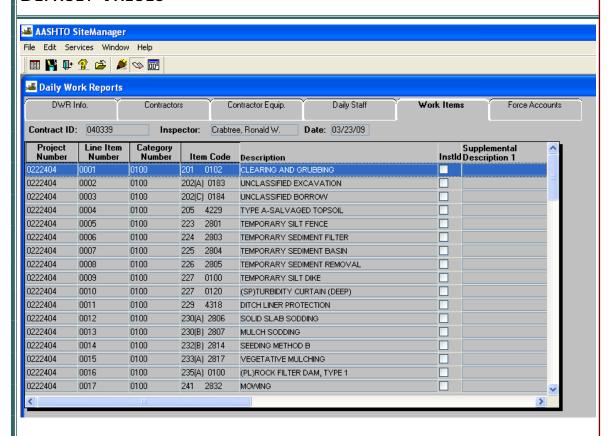
**SCREENSHOTS**

## ODOT WILL NOT USE THIS WINDOW

## DEFAULT VALUES



Work Items are all available pay items for the contract. Entries shall be filled in for all work done on a project.

Before Items can be recorded on the Items folder tab, the Contractor must be shown as being on the construction site in the Contractors folder tab. Refer to Contractors Folder Tab for additional information.

\* \* \*

RECORD WORK ITEM INFORMATION :

If work was done but for no pay, the information above should be entered and a zero should be entered in the Placed Quantity field. For example, if a CICI Design D is called for and a Design B was placed, then a location should be added for the line item in Design D noting that it was changed to a Design B and paid for as such.

| 0501.5 | DAILY WORK REPORT |
|--------|-------------------|

## DEFAULT VALUES

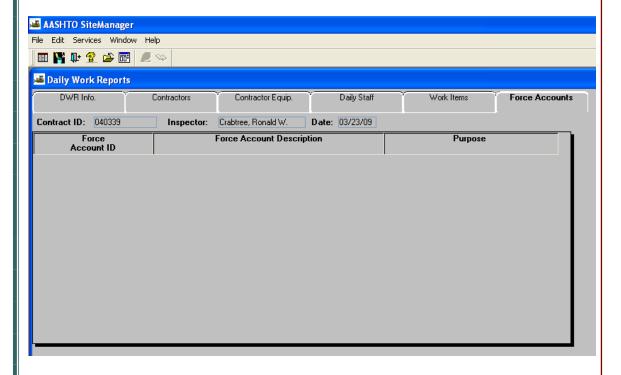| | |
|---|---|
| **PLACED QUANTITY** | The Placed Quantity field should be populated with the quantity of the item installed for that day. |
| | Material deficiencies will be accessed during the estimate process. Refer to the Line Item Adjustment policy and procedure for additional information regarding material deficiencies. |
| | Calculations and/or additional information regarding the placed quantity should be recorded in the Remarks bubble located on the Tool Bar. If another program, a drawing, or other form of documentation was used, refer to the location of this information in the Remarks bubble. |
| **CONTRACTOR** | The contractor who performed the work should be recorded in the Contractor field. Only contractors who are both approved to perform work on the item and are listed as on the construction site will be available for selection. For example, if a subcontractor is installing an item, the subcontractor must be approved to install the item in the Subcontract window and listed on the Contractor folder tab of Daily Work Reports. If there is more than one contractor performing the work, then additional locations should be created for each contractor. |
| **PLAN PAGE NUMBER** | ODOT will not use the Plan Page Number field. |
| **LOCATION** | The Location field is a required field in SiteManager. Record placement information in the Location field according to the plan stationing. Location may be the baseline or centerline (i.e. Lane A), and it may also include the structure number. |
| **STATION** | The Station information should also be recorded. Station is the actual location where work began and ended on the project. |
| **OFFSET** | The Offset field refers to whether the location is right or left of the Location (Baseline/Centerline). |
| **DISTANCE** | The Distance field refers to the Distance right or Left of the (Baseline/Centerline). |
| **ATTACHMENTS** | Attachments may be made to the Work Item folder tab in Daily Work Reports if supporting documentation is available in electronic form. |
| **DAILY WORK REPORT TEMPLATES** | Daily Work Report Templates may be used to calculate pay quantities if a DWR Template is available. Refer to Section 505.0 for additional information regarding available DWR Templates. |

## SCREENSHOTS

# ODOT WILL NOT USE THIS WINDOW

**AASHTO SiteManager**

File  Edit  Services  Window  Help

**Daily Work Reports**

| DWR Info. | Contractors | Contractor Equip. | Daily Staff | Work Items | **Force Accounts** |

Contract ID: 040339    Inspector: Crabtree, Ronald W.    Date: 03/23/09

| Force Account ID | Force Account Description | Purpose |
| --- | --- | --- |

## SCOPE

To establish a policy and procedure for utilizing the Diary window.

## GENERAL

The Diary window is used to authorize Daily Work Reports and charge time towards a Contract.

## SCREENSHOTS



## DEFAULT VALUES

In ODOT, a Diary must be completed for each day of the contract including weekends and holidays, beginning no later than the effective date of the work order. The Diary will be used by ODOT to authorize Daily Work Reports and to assign time towards the contract.

## All Diaries should be created on the Server.

The Project Manager or Resident Engineer Designee will create the Diary in SiteManager and authorize the Daily Work Reports. Once a Daily Work Report has been authorized, only users with update security rights may un-authorize the Daily Work Report. Once a Diary is included on an estimate, the Daily Work Reports may not be unauthorized.

The Project Manager or Resident Engineer Designee may record remarks on the Diary.

## DEFAULT VALUES

The following is a list of remarks that are available to ODOT. Required remarks are bolded.

| REMARK TYPE | REMARK DESCRIPTION |
|---|---|
| ACCIDENTS | Record information on accidents that occurred within the Contract limits. Include the station, time, officer, the agency, and a brief description of the accident. |
| DELAY | Record any event that would cause the contractor delay in work activities. Example: Rainfall caused sub-grade to become unworkable. |
| GENERAL REMARKS | Record observations on the Contract site that do not apply to any other category. Information in the General Remarks will display on the Time and Diary Record. |
| INSTRUCTIONS | Record information on any orders that were received that day. |
| PERSONNEL REMARKS | Record information pertaining to project personnel. |
| PRIME CONTRAC-TOR WORK | Record information about work performed by the Prime Contractor. |
| SITE CONDITIONS | Record Surface conditions (Dry or Muddy) and the amount of rainfall that has been received. The Site Conditions is required for the Time and Diary Record. |
| SUBWORK | Record information about work performed by the subcontractors. |
| SUPERVISORS RE-MARKS | Record information pertaining to project supervisors. |
| TYPE OF DAY | Record information in accordance with Spec Book section 108.07(b). The Type of Day is required for the Time and Diary Record. Up to ten characters will be displayed in the Time and Diary Record. |
| UNAPPROVED WORK | Record work performed that is not approved. |
| VISITORS | Record visitors to the construction site. |

## DEFAULT VALUES



Under the 1999 Specifications, a Diary should ALWAYS be a FULL day charge, regardless if the contract is an available Day or Fixed Completion Date Contract.

Half day charges and no charge days will not be used by ODOT.

Adjustments made to time charges for available Day Contracts will be made on the Time and Diary Record during the Estimate process.

Refer to Contract Time Adjustments for additional information regarding the Time and Diary Record.

Time will be adjusted on Fixed Completion Date contracts with a Change Order.

Refer to Change Order Time Adjustments for additional information.

All Milestones will be Fixed Completion Date or Calendar Day.

Therefore, time will automatically be assessed by SiteManager, and Milestone time charges will not be made on the Diary.

The Total Number of Diaries should always be the Total Diary Charge Days.

The Total Diary No Charge Days should always be zero.

The Adjusted Total Diary Charged Days should always be zero.

The Adjusted Total Diary No Charge days should always be zero.

## SCOPE

To establish a policy and procedure for utilizing the History window

## GENERAL

 the Daily Work Reports History panel lets the User run reports of Daily Work Report records for the selected Contract. To run history reports, the User must select a Contract when the History panel first opens and displays a selection list of contracts. The history reports display all report records for the selected Contract by default. The History panel has three folder tabs: DWR History, Work Item History, and Contractor History.

ODOT personnel may refer to the History window for a summary list of contractor's information, work items, and DWR's for the entire length of the contract.

## SCREENSHOT

## SCREENSHOTS

## SCOPE

### ODOT WILL NOT USE THIS WINDOW

## SCREENSHOTS

## SCOPE

To establish the uses of Daily Work Report **Templates** in SiteManager.

## GENERAL

When a Daily Work Report Template is available for an item(s) of work, it is encouraged that the template be used. This will provide for consistency in format and output.

### ASSIGNMENTS FOR TEMPLATES TO PAY ITEMS WILL BE DONE BY CONSTRUCTION DIVISION

## SCREENSHOT

| **0506.0** | **CONTRACT ITEM DWR TEMPLATE** |

## SCOPE

To establish the uses of Daily Work Report **Templates** in SiteManager.

## GENERAL

### ASSIGNMENTS FOR TEMPLATES TO PAY ITEMS WILL BE DONE BY RESIDENCY PERSONNEL

## SCREENSHOT

## DWR TEMPLATE USAGE REPORT | 0507.0

### SCOPE

To establish the uses of Daily Work Report **Templates** in SiteManager.

### GENERAL

Daily Work Report Template usage report is to e used for auditing prposes.

### SCREENSHOT

| 0508.0 | PROCESS LIST |
|---|---|

## SCOPE

The Process list window identifies processes that are available to the authorized user.

## GENERAL

## SCREENSHOT

## REPORTS

| REPORTS | SUBSET | PARAMETERS | PRINTING | DESCRIPTION |
|---|---|---|---|---|
| TIME & DIARY REPORT | Contract | Report ID | Landscape Mode | This customized report will serve as the report that is sent to the contractor to identify the contract time that has been assessed on the contract. |

## OVERVIEW

To establish a policy and procedure for utilizing the Reference Tables located in Daily Work Reports.

The Reference Tables (DWR) section contains two icons: the Vendor Master List and the Contract Master List.

The Vendor Master List window contains the Supervisors, Personnel Types, and Equipment for each vendor. Refer to Vendor Master List for additional information.

The Contract Master List window contains the Supervisors, Personnel Types, and Equipment associated to each vendor on a contract specific basis. Refer to Contract Master List for additional information.

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PATH

| **0509.1** | **VENDOR MASTER LIST** |

## SCOPE

To establish a policy and procedure for Reference Table for Vendor master list.

## GENERAL

The Vendor Master List allows a user to maintain a centralized list of equipment, personnel types, supervisors and agency staff associated to a vendor.

The Vendor Master List is divided into four sections: Equipment, Personnel, Supervisor, and Staff. ODOT will not use the Staff section of Vendor Master Lists.

The Vendor Master List will be populated by the Construction Division. If any Equipment Type, Personnel Type, or Supervisor Type is not on the Vendor Master list, a request should be made to the Construction Division through SiteManager Support.

## SCREENSHOT

**SCREENSHOTS**

SCREENSHOTS

**SCREENSHOTS**

## ODOT WILL NOT USE THIS WINDOW

| | |
|---|---|
| **0509.2** | **CONTRACT MASTER LIST** |

## SCOPE

To establish a policy and procedure for utilizing the Contract Master List window.
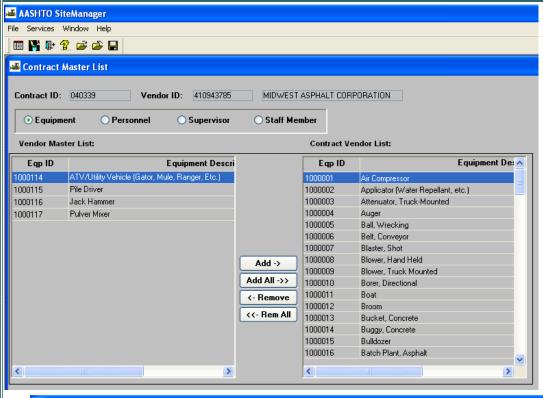
## GENERAL

The Contract Master List is used to associate the Vendor Master List to specific contracts. A record on the Vendor Master List can be associated to multiple contracts. The Vendor Master List and the Contract Master List are created and maintained on the server. The Contract Master List is piped down when Basic Contract Data is selected on the Server to PM pipeline screen. The Contract Master List is read only in stand-alone mode. If changes need to be made, the Contract Master List must be corrected on the server and the Basic Contract Data piped down again to update the list on the stand-alone.
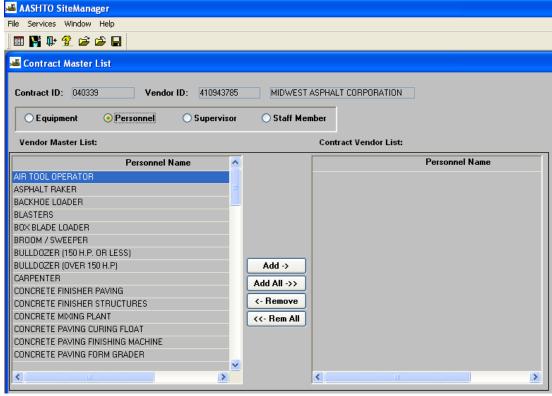
Once a contract is activated and sent to the Residency, a designated individual will associate all personnel types, equipment, and supervisors that will be used on the contract for each contractor. It is recommended that only the personnel types, equipment, and supervisors that will be used by the contractor on the contract be associated to the contract so that only the personnel types, equipment, and supervisors approved for the contract will be available for selection on the Daily Work Report. If an equipment type, personnel type, or supervisor is not available to associate to a contract, contact the Construction Division through SiteManager Support.
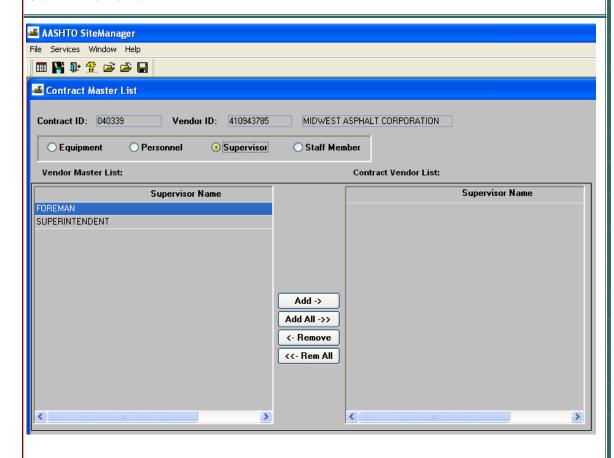
## SCREENSHOTS

SCREENSHOTS

**SCREENSHOTS**

## ODOT WILL NOT USE THIS WINDOW

# Oklahoma Department of Transportation