Trns·port

SiteXchange ™

Contractor Data Transfer

SiteXchange for the Oklahoma Department of Transportation Contractors

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Contents

1. Introduction

By the end of this module, you will be able to:

- Understand SiteXchange SubCon

- Understand the hardware and software requirements

- Install SiteXchange SubCon

- Use buttons and menus to evoke commands

- Access the Help Desk

May 2005

1.1 Using the Student Guide

The student guide is divided into sections — learning modules. Each learning module consists of:

- Objectives

- Multiple Topics

- Instructor-Led Exercises

- Review

Each section will begin with the objectives for the module. The module will be divided into topics roughly corresponding to the objectives of the module. Each topic will have a short description of the SiteXchange function, one or more general procedures about how to perform an action in SiteXchange, and an exercise for the topic. Exercises are easy to spot on each page. The exercises are identified by the Bulldozer graphic illustrated below and are numbered sequentially. The exercises are very explicit and detail the specific steps and data to be used in performing the action.

Exercise 5-2

Exercises are identified by the Bulldozer
graphic

Figure 1-1

Each module will end with a review and a summary exercise. The review will summarize the main points and *all of the SiteXchange functionality covered in the module*. The review pages may serve as an excellent reference as a work aid for use back at the office.

1.2 Understanding SiteXchange

Trns•port SiteXchange® allows for the electronic transfer of subcontract information between prime contractors and the Oklahoma Department of Transportation. The Oklahoma Department of Transportation sends the prime contractor a contract file, which contains the basic contract information and item information. The prime contractor also receives a vendor file from the Oklahoma Department of Transportation, which contains a list of contractors used by the Oklahoma Department of Transportation.

The Prime Contractor inputs the contract and vendor information they receive from the Oklahoma Department of Transportation into the SiteXchange SubCon program. The Prime Contractor enters subcontract information, including subcontract vendors, items, item quantities, and item prices into SiteXchange SubCon, and then electronically submits the modified Contract.con file to the Oklahoma Department of Transportation's Construction Division for approval.
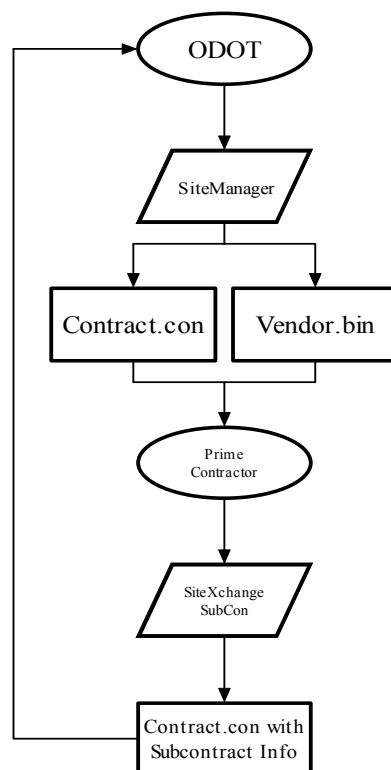
SiteXchange Process Flowchart

Figure 1-2.

1.3 Installing SiteXchange SubCon

Prime contractors will download SiteXchange from the Oklahoma Department of Transportation's website. If a Prime Contractor does not have access to the internet, the Oklahoma Department of Transportation will send the prime contractor a copy of SiteXchange on a floppy disk, along with instructions on how to process subcontractors through SiteXchange.

1.3.1 Hardware and Software Requirements

SiteXchange SubCon is available on the Oklahoma Department of Transportation's website or on floppy disk. You will need these minimum hardware requirements in order to install the system programs:

Requirements	Requirement Description
Operating System	Microsoft Windows 98 or NT (Workstation or Server) 4.0 or higher
Processor	Intel 80486 or equivalent; Pentium or better recommended
RAM	32 MB minimum for Windows NT; the more RAM you have, the better your computer will perform
Disk Storage	20 MB free space

Minimum Hardware Requirements

Table 1-1.

1.3.2 Installing SiteXchange SubCon from Floppy Install Disks

Based on your company's configurations, the installation instructions may vary.

Choose Destination Location   ×

Setup will install SiteXchange SubCon 1.0a in the following folder.

To install to this folder, click Next.

To install to a different folder, click Browse and select another folder.

You can choose not to install SiteXchange SubCon 1.0a by clicking Cancel to exit Setup.

Destination Folder

c:\SiteXchange\SubCon   Browse...

< Back   Next >   Cancel
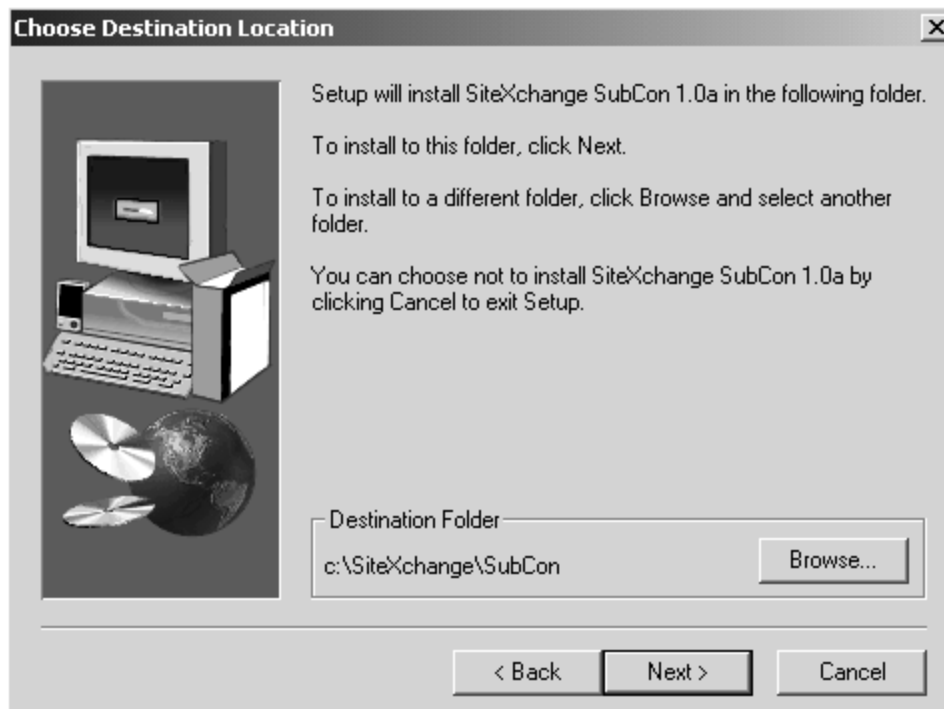
SiteXchange SubCon Installation

Figure 1-3.

The Oklahoma Department of Transportation's website will have the following SiteXchange information:

- **SiteXchange SubCon application**
- **SiteXchange SubCon training manual**
- **SiteXchange SubCon training Contract.con and Vendor.bin files**
- **Current Contract.con file**
- **Current Vendor.bin file**

Exercise 1-1

In the following exercise, you install SiteXchange SubCon application on your computer.

1. Insert the Install Disk into your floppy drive.

2. Click the **Setup.exe** icon.

3. Click the **Next** button.

4. Click the **Yes** button.

5. Select a location to install SiteXchange SubCon or use the default location.

6. Click the **Next** button.

7. Click the **Next** button.

8. Click the **Finish** button.

    SiteXchange SubCon may open if the Open SiteXchange Check box is selected. If SiteXchange SubCon is open, you may skip the next exercise.

1.4 Starting SiteXchange SubCon

You must be running Windows to start the SiteXchange SubCon program.

Subcon Icon

Figure 1-4.

 Exercise 1-2

In the following exercise, you start the SubCon program.

1. Double-click the **SiteXchange SubCon** icon.

2. SubCon opens to the main SubCon window, displaying two empty panes.

1.5 Using Buttons and Menus to Invoke Commands

Most SiteXchange SubCon windows have title bars, menu bars, and tool bars that can be used to easily activate commands.

Select SiteXchange SubCon commands in one of these ways:

- Click on the menu name to display the menu items available from that menu. From there, select the command you want to run. For example, you could select **Open** from the **File** menu,

- Click on one of the buttons on the tool bar to begin working with one of the major groups of data. For example, you could click on the Open Contract button and SubCon would display the Open Proposal window.
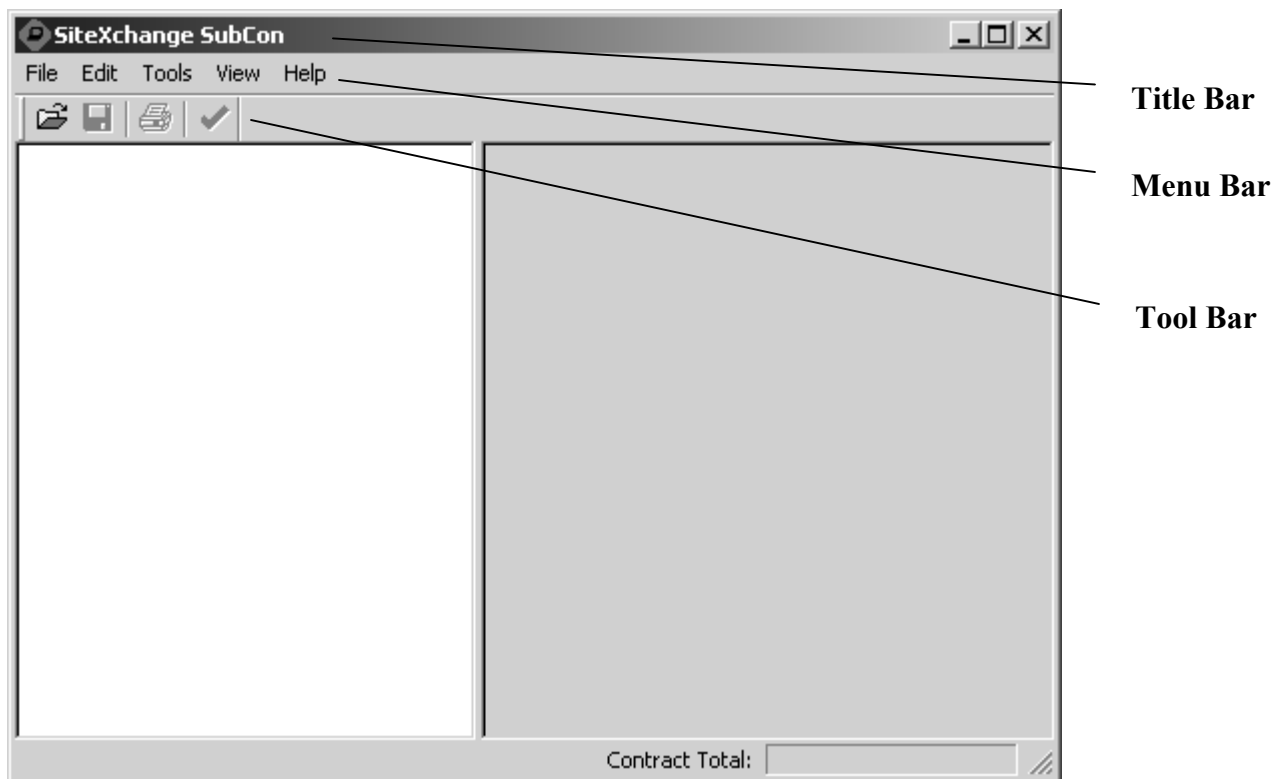
Typical SiteXchange SubCon Title, Menu, and Tool Bars

Figure 1-5.

1.5.1 Title Bar

The title bar contains the name of the application or window and buttons you can click to size, move, and close the window. In Windows, you can access the Control menu by clicking an icon in the upper-left corner of the window that represents the application in which you are working. In SubCon this icon will look like a small yellow triangle enclosing the letters SUB.

Another way to manipulate the window is to use the three buttons in the upper-right corner of the window. The **x** button closes the application completely, the middle button either reduces the size of the window to its intermediate size or maximizes the window from its intermediate size, and the _ button minimizes the application and displays it on the Windows taskbar.

1.5.2 Menu Bar

The menu bar (which includes the File, Edit, Tools, View, and Help menus) contains the names of menus of commands. Dimmed (grayed) menus are not available for the active window. You can click on a menu name to display all available commands for that menu, and then click on the command to activate it.

FILE MENU
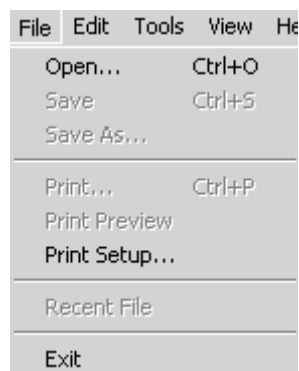
SiteXchange SubCon File Menu

Figure 1-6.

Menu Selection	Function
Open	The Open selection opens the Open Contract window.
Save	The Save selection saves the opened contract modifications to the current file.
Save As	The Save As selection allows the user to save the contract to a different location with a different name.
Print	The Print selection prints the Schedule of Items Report.
Print Preview	The Print Preview selection allows users to preview the Schedule of Items Report.
Print Set Up	The Print Set-Up selection allows users to designate printing options.
Exit	The Exit selection allows users to exit the SiteXchange SubCon program.

File Menu Commands and Functions

Table 1-2.

EDIT MENU
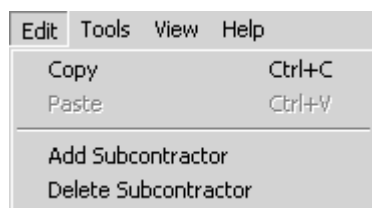
SiteXchange SubCon Edit Menu

Figure 1-7.

Menu Selection	Function
Copy	The Copy selection allows users to copy text from one record to another record.
Paste	The Paste selection allows users to paste the copied text from one record to another record.
Add Subcontractor	The Add Subcontractor selection allows users to add a subcontractor to the contract.

Menu Selection	Function
Delete Subcontractor	The Delete Subcontractor selection allows users to delete a subcontractor and all its associated items from a contract.

Edit Menu Commands and Functions

Table 1-3.

TOOLS MENU

SiteXchange SubCon Tools Menu

Figure 1-8.

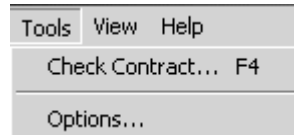| Menu Selection	Function
Check Contract	The Check Contract selection will check the contract to ensure that all required data is entered in SiteXchange SubCon.
Options	The Options selection allows for users to designate print options, window background colors, and other miscellaneous settings.

Tools Menu Commands and Functions

Table 1-4.

VIEW MENU
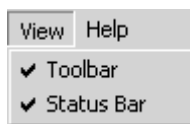
SiteXchange SubCon View Menu

Figure 1-9.

Menu Selection	Function
Toolbar	A check next to the Toolbar selection indicates that the tool bar will display in the window.
Status Bar	A check next to the Status Bar selection indicates that the status bar will display at the bottom of the window.

View Menu Commands and Functions

Table 1-5.

HELP MENU

SiteXchange SubCon Help Menu

Figure 1-10.

Menu Selection	Function
About SiteXchange	The About SiteXchange selection may be used to identify the version of SiteXchange SubCon that is installed.

Help Menu Commands and Functions

Table 1-6.

1.5.3 Tool Bar

Below the menu bar is the tool bar, which contains buttons for some of the most useful commands from the menus. The buttons available on this bar depend on the window that is open. In other words, the tool bar is context specific.
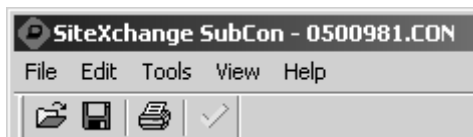
SiteXchange SubCon Tool Bar

Figure 1-11.

Tool Bar Selection	Function
	The Open button opens the Open Contract window.
	The Save selection saves the opened contract modifications to the current file.
	The Print selection prints the Schedule of Items Report.
	The Check Contract selection will check the contract to ensure that all required data is entered in SiteXchange SubCon.

Tool Bar Icons and Functions

Table 1-7.

1.6 Accessing the SiteXchange SubCon Help Desk

Prime Contractors may request assistance for using SiteXchange SubCon and/or submitting subcontract requests by doing the following:

- Email the Oklahoma Department of Transportation's Construction Division at SubcontractRequest@ODOT.org

- Call the Oklahoma Department of Transportation's Construction Division directly at (405) 521-2561.

Section 1 Review

To install SiteXchange SubCon:

1. Insert the Install Disk into your floppy drive.

2. Click the **Setup.exe** icon.

3. Click the **Next** button.

4. Click the **Yes** button.

5. Select a location to install SiteXchange SubCon or use the default location.

6. Click the **Next** button.

7. Click the **Next** button.

8. Click the **Finish** button.

To start SiteXchange Subcon:

1. Double-click the **SubCon** icon.

2. SubCon opens to the main SubCon window, displaying two empty panes.

To access the SiteXchange Help Desk:

1. Email questions to the Oklahoma Department of Transportation's Construction Division: SubcontractRequest@ODOT.org

2. Call the Oklahoma Department of Transportation's Construction Division at (405) 521-2561.

Learning Module

2. Managing Subcontract Information

By the end of this module, you will be able to:

- Open a contract file

- Use the Tree View

- View general contract data

- View general subcontract data

- View a DBE subcontractor

- Add, modify, and delete a subcontractor

- Add a subcontractor to the Vendor List

- Modify items, quantities, and prices

- Enter Miscellaneous Data

- Check the contract

- Print the Schedule of Items Report

- Send the SiteXchange SubCon file to the Oklahoma Department of Transportation

May 2005

2.1 Opening a Contract File

SiteXchange SubCon displays the main window with the contract
identified in the title bar. The left pane of the window displays a tree view
of the contract information and the right pane displays general information
about the contract.

You can adjust the width of the panes by placing the cursor over the
border between the two panes until the cursor turns into a line with arrows
on each end. Press the left mouse button and drag left or right to adjust the
width of the panes. The panes maintain these new widths until you change
them again.

2.1.1 Using the Tree View

When a contract is first opened, the contract folder is displayed in the left
pane of the contract window, but the folder is closed. To the left of the
folder icon is a plus box [+]. Click on the plus box [+] to expand the tree
view hierarchy for that contract. Notice that the plus box [+] has changed
to a minus box [-]. You can collapse the tree view again by clicking the
minus box [-].

Clicking on any folder in the hierarchy will open that folder and display
related information in the right pane of the contract window. The tree view
contains a folder for the contract, each subcontractor in the contract,
miscellaneous data, and contract items.

Each subcontractor folder has a corresponding Items folder containing a
list of all the contract items assigned to that subcontractor, if that
subcontractor uses subcontract items.

The folders in the tree view are color-coded: a green folder indicates that it
contains valid, error-free information; a yellow folder indicates that it
contains information with warnings; and a red folder contains information
with errors.
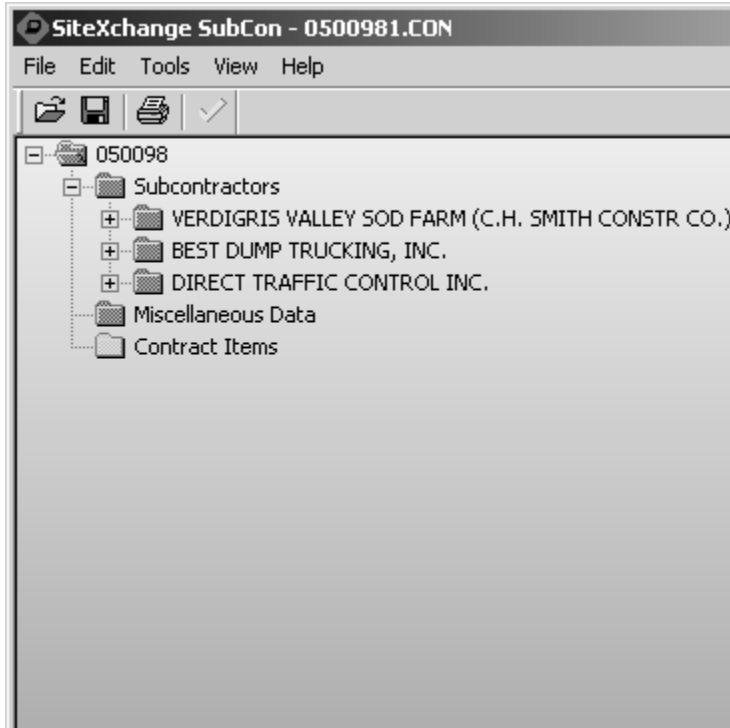
SiteXchange SubCon Tree View

Figure 2-1.

> **After the contract is awarded, the Contract.con file and Vendor.bin file will be posted to the Oklahoma Department of Transportation's website for download.**
>
> **The Contract.con file may be placed in any location. The Vendor.bin file must be placed in the SiteXchange SubCon directory.**

2.1.2 Viewing General Contract Information

The general information about the opened contract is displayed in the right pane of the window. All fields on the Contract window are populated by the Oklahoma Department of Transportation through the Contract file and may not be modified by the Contractor.

Contract Window

Figure 2-2.

Field	Field Description
Contract ID	The Oklahoma Department of Transportation defined ID for the contract.
Project ID	The Oklahoma Department of Transportation defined ID for the project. If the contract is comprised of multiple projects, then the Project ID field will display "Multiple," indicating that there is more than one project on the contract.
Prime ID	The Oklahoma Department of Transportation defined ID for the prime contractor.
Prime Name	The name of the prime contractor, as defined in the Oklahoma Department of Transportation's records.
County	The county for the contract. If the contract is comprised of multiple counties, then the County field will display "Multiple," indicating that there is more than one county included on the contract.
Letting Date	The date the contract was let.
Date Generated	The date the SiteXchange SubCon file was generated.
Check	The identification number used to verify the integrity of the contract file..
Description	The description of the contract.

Contract Window Fields Table

Table 2-1.

Throughout the life of the contract, the Oklahoma Department of Transportation will post an updated Contract.con file to the website when the following has occurred:

- **Subcontractors are approved**

- **Change Orders are approved**

The Prime Contractor should access a new Vendor.bin file from the Oklahoma Department of Transportation's website each time updates are made to the Contract.Con file.

Exercise 2-1

In the following exercise, you will open a Contract file and view basic Contract information in SiteXchange SubCon.

1. Click the **Open Contract** button.

    The Open Contract window opens.

2. In the **Samples** folder, click the **0500981.CON** file.

3. Click the **Open** button.

    The left pane of the window displays a tree view of the contract information, and the right pane of the window displays general information about the contract.

2.2 Modifying Subcontractors

Once the contract is loaded into SiteXchange SubCon, the Prime
Contractor may use SiteXchange SubCon to add subcontractors and
subcontracted items to the Contract.

2.2.1 Viewing General Subcontract Information

The Subcontract window displays general subcontract information
regarding the subcontracts assigned to the contract.

Subcontractors Window

Figure 2-3.

All Subcontractors should be entered in SiteXchange SubCon.

**The Oklahoma Department of Transportation and SiteXchange SubCon does
not allow tiered Subcontractors.**

Field	Field Description
Letting Date	The date the contract was let.
Contract ID	The Oklahoma Department of Transportation defined ID for the contract.
Call Order	The proposal call order number. This field will be blank.
Subcontractors	This field displays the total number of subcontractors associated to the contract.
Subcontractors Total Entered	These fields indicate the total percentage of the contract that has been subcontracted and the total dollar amount that has been subcontracted on the contract.

Subcontracts Window Fields

Table 2-2.

2.2.2 Viewing a DBE Subcontractor

Information for DBE Subcontractors may be maintained in SiteXchange SubCon. DBE Subcontractors that were submitted as part of the DBE Commitment are included in SiteXchange SubCon without items or subcontract amounts. The Prime Contractor will need to modify the Sub Type field for the DBE Subcontractor and enter the DBE subcontract amount or assign the appropriate items to the DBE Subcontractor.
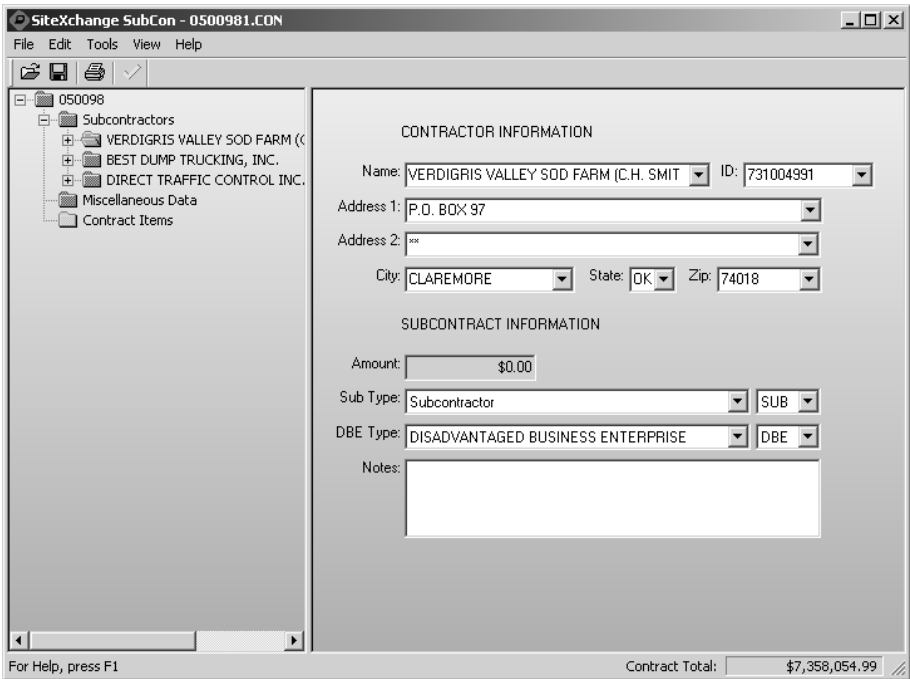
Subcontractors Window

Figure 2-4.

Field	Field Description
Contractor Information	
Name	The name of the subcontractor, as defined in the Oklahoma Department of Transportation's records.
ID	The Oklahoma Department of Transportation defined ID for the subcontractor. This field is automatically populated when the name of the subcontractor is selected.
Address 1	The address of the subcontractor as defined in the Oklahoma Department of Transportation's records. This field is automatically populated when the name of the subcontractor is selected.

Field	Field Description
Address 2	The address of the subcontractor as defined in the Oklahoma Department of Transportation's records. This field is automatically populated when the name of the subcontractor is selected.
City	The city used in the address of the subcontractor. This field is automatically populated when the name of the subcontractor is selected.
State	The state used in the address of the subcontractor. This field is automatically populated when the name of the subcontractor is selected.
Zip	The zip code used in the address of the subcontractor. This field is automatically populated when the name of the subcontractor is selected.
Subcontract Information	
Amount	Total current amount for subcontract items or work done. This field is automatically calculated if the subcontract contains items. This field is updateable if the Sub Type is Engineering, Material Supplier, Trucking, or Fabricated Material Supplier.
Sub Type	The Sub Type field contains valid subcontractor classifications. The ID field to the right of the Sub Type field is automatically populated when a Sub Type is selected.
DBE Type	The DBE Type field contains valid codes for DBE types. In the Oklahoma Department of Transportation, subcontractors may be a DBE, WBE, or NON DBE WBE MEBE. The ID field to the right of the DBE Type field is automatically populated when the DBE Type is selected.
Notes	Miscellaneous comments may be added to the subcontract record in this field.

The Add Subcontractors Window Fields

Table 2-3.

> **When accessing the DBE Subcontractor record for the first time in SiteXchange SubCon, the Prime Contractor must input the Sub Type of the DBE Subcontractor on the Subcontracts window.**
>
> **The Prime Contractor can add new DBE Subcontractors into SiteXchange SubCon.**

Exercise 2-2

In the following exercise, you will indicate that a Subcontractor is a DBE in SiteXchange SubCon.

1. In the **Tree View**, click the **VERDIGRIS VALLEY SOD FARM** folder.

    The general subcontract information will display on the right.

2. In the **Sub Type** drop-down list, click the expand arrow and click **SUBCONTRACTOR**.

    The folder tab for the subcontractor changes from red to green, indicating that all required information is entered.

3. Click the **Save** button.

2.2.3 Adding a Subcontractor

To add a subcontractor to the contract, click on the contract folder in the tree view and select **Add Subcontractor** from the **Edit** menu. You can also add a subcontractor by clicking on the Subcontractors folder and selecting **Add Subcontractor** from the right mouse button menu.

SubCon adds a new folder to the list of subcontractors for the contract in the left pane and displays text boxes for adding new subcontract information in the right pane.

To add the new subcontractor, enter the subcontractor's name or click the down arrow to display a list of vendors. If you enter the first letters of a name that already exists in the list, SubCon will automatically advance the list to that name. Click on the name to select it and SubCon enters information for that vendor into the remaining text boxes. You can also select a vendor by entering the vendor's ID number in the ID text box, or the vendor's address in the Address text box.

Add Subcontractors Window

Figure 2-5.

> **If a Subcontractor goes out of business, the Prime Contractor is
> responsible for modifying the item quantities on the defaulted
> Subcontractor in SiteXchange SubCon. This is to reflect the work the
> Subcontractor has already performed. In addition, the Prime
> Contractor should comment in the Notes field on the Subcontractor
> window that the Subcontractor has defaulted. If appropriate, the Prime
> Contractor should enter the new Subcontractor who will complete the
> work started by the defaulted Subcontractor in SiteXchange SubCon.**

Exercise 2-3

In the following exercise, you will add a Subcontractor who will
subcontract items in SiteXchange SubCon.

4. In the **Tree View**, click the **Subcontractors** folder.

    The general subcontract information will display on the right.

5. Right click and select **Add Subcontractor**.

    A red folder entitled Unknown Subcontractor is added to the Tree View.

6. In the **Name** drop-down list, click the expand arrow and click **APAC-OKLAHOMA, INC**.

    The vendor ID and address is automatically populated.

7. In the **Sub Type** drop-down list, click the expand arrow and click **Subcontractor**.

8. In the **DBE Type** drop-down list, click the expand arrow and click **NON DBE WBE MBE**.

    *The folder tab for the added subcontractor changes from red to green, indicating that all
    required fields are entered.*

9. Click the **Save** button.

Exercise 2-4

In the following exercise, you will add a Subcontractor who will be
deleted in a later exercise.

1. In the **Tree View**, click the **Subcontractors** folder.

    The general subcontract information will display on the right.

2. Right click and select **Add Subcontractor**.

    A red folder entitled Unknown Subcontractor is added to the Tree View.

3. In the **Name** drop-down list, click the expand arrow and click **HASKELL LEMON
    CONSTRUCTION CO**.

    The vendor ID and address is automatically populated.

4. In the **Sub Type** drop-down list, click the expand arrow and click **Subcontractor**.

5. In the **DBE Type** drop-down list, click the expand arrow and click **NON DBE WBE MBE**.

    The folder tab changes from red to green, indicating that all required fields are entered.

10. Click the **Save** button.

2.2.4 Adding Subcontractors Not Linked to Items

A Subcontractor who is a material supplier, provides support services, or is only used for trucking may also be added in SiteXchange SubCon. Select one of the following Sub Types in the Subcontractors window to indicate one of these types of Subcontractors:

- Engineering

- Material Supplier

- Trucking

- Fabricated Material Supplier

The amount for which the Subcontractor is being subcontracted for should be entered in the Amount field.

Trucking Only Subcontractor

Table 2-4.

> **If the Subcontractor is an Engineering Material Supplier, Trucking, or Fabricated Material Supplier Subcontractor, the Prime Contractor should input the amount of the subcontract in the Amount field. In the Notes field, the Prime Contractor should describe the purpose and list the materials and/or services provided by the Subcontractor.**

Exercise 2-5

In the following exercise, you will add a Subcontractor who is a Trucking Only Subcontractor in SiteXchange SubCon.

1. In the **Tree View**, click the **Subcontractors** folder.

    The general subcontract information will display on the right.

2. Right click and select **Add Subcontractor**.

    A red folder entitled Unknown Subcontractor is added to the Tree View.

3. In the **Name** drop-down list, click the expand arrow and click **A&A TRUCKING**.

    The vendor ID and address is automatically populated.

4. In the **Sub Type** drop-down list, click the expand arrow and click **Trucking**.

5. In the **DBE Type** drop-down list, click the expand arrow and click **NON DBE WBE MBE**.

    The folder tab changes from red to green, indicating that all required fields are entered.

6. In the **Notes** field, type, **Hauling cold milling material for item 0041.**

7. In the **Amount** field, type **319.60**.

8. Click the **Save** button.

Exercise 2-6

In the following exercise, you will add a Subcontractor who is a DBE Subcontractor in SiteXchange SubCon.

1. In the **Tree View**, click the **BEST DUMP TRUCKING** folder.

    The general subcontract information will display on the right.

2. In the **Sub Type** drop-down list, click the expand arrow and click **Trucking**.

3. In the **Notes** field, type, **Hauling asphalt concrete.**

4. In the **Amount** field, type **6000**.

5. Click the **Save** button.

2.2.5 Adding a New Subcontractor to the Vendor List

Subcontractors are maintained in the Oklahoma Department of Transportation's Vendor List. If a Subcontractor is not on this Vendor List, Prime Contractors may add the new Subcontractor on the Subcontracts window in SiteXchange SubCon.

New Subcontractor

Table 2-5.

At the Oklahoma Department of Transportation, the following information is required for a new Subcontractor record to be added in SiteXchange SubCon:

- **Vendor ID field = the Federal Employee Identification Number**

- **Name field = the name of the company**

- **Address 1 & 2 fields = the billing address of the company**

- **Notes field = authorized officer of the company, phone number, fax number, and email address (if applicable)**
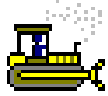
Exercise 2-7

In the following exercise, you will add a new Subcontractor to the Vendor
List in SiteXchange SubCon.

1. In the **Tree View**, click the **Subcontractors** folder.

    The general subcontract information will display on the right.

2. Right click and select **Add Subcontractor**.

    A red folder entitled Unknown Subcontractor is added to the Tree View.

3. In the **Name** field, type **DOZER'S INC**.

4. In the **ID** field, type **731589156**.

5. In the **Address 1** field, type **1032 NORTH LEE BLVD**.

6. In the **City** field, type **ALTUS**.

7. In the **State** field, type **OK**.

8. In the **Zip** field, type **74576**.

9. In the **Sub Type** drop-down list, click the expand arrow and click **Subcontractor**.

10. In the **DBE Type** drop-down list, click the expand arrow and click **NON DBE WBE MBE**.

    The folder tab changes from red to green, indicating that all required fields are entered.

11. In the **Notes** field, type the following:

    • Alan Conner – President

    • Phone: (580) 323-4578

    • Fax: (580) 323-4500

    • Email: Dozers@aol.com

12. Click the **Save** button.

2.2.6 Deleting a Subcontractor

Subcontractors that have been associated to contracts in SiteXchange may be deleted from the contract. By deleting the subcontractor, you delete all associated items on that subcontractor. A warning message box will appear, asking the user if he or she is sure they want to delete the subcontractor.

Delete Warning Message

Figure 2-6.

At the Oklahoma of Department of Transportation, approved Subcontractors cannot be deleted. However, the Prime Contractor can delete a Subcontractor if the Subcontractor has not yet been sent to the Oklahoma Department of Transportation for approval.
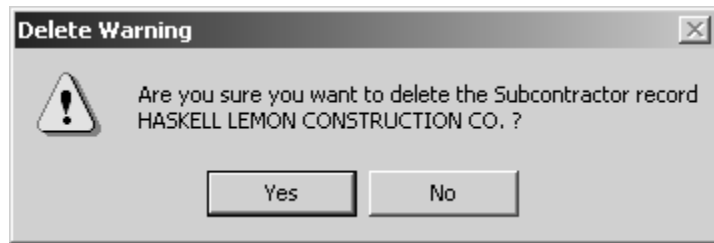
Exercise 2-8

In the following exercise, you will delete a Subcontractor in SiteXchange SubCon.

1. In the **Tree View**, click the **HASKELL LEMON CONSTRUCTION CO** folder.

    The general subcontract information will display on the right.

2. Right click and select **Delete Subcontractor**.

3. Click the **Yes** button to the message confirming the deletion.

4. Click the **Save** button.

2.3 Managing Subcontract Items, Item Quantities, and Prices

When you have finished adding a new subcontractor to the contract, you can now begin to define the items on which that vendor will work. To assign items to a subcontractor, click on the Subcontractor Items folder for that subcontractor.

The window is divided into two sections. The upper section of the window contains a scrollable list of all the items that can be subcontracted. The list is organized by section and line numbers. The items that are not assigned to the selected subcontractor appear dimmed.

The lower section of the window contains information about the item currently selected in the list. You can add, change, or delete the quantity, unit price, and total cost information for the selected item. You can also add miscellaneous information in the Note field.

2.3.1 Entering Subcontract Items

To subcontract an item to a vendor, select the item from the list in the upper section of the Subcontractor Item window, and either click the check box in the Use? column in the upper section of the window or the check box labeled **Subcontract this item to this vendor** in the lower section of the window. To delete an item, select the item in the upper section of the window and clear either the Use? check box or the **Subcontract this item to this vendor** check box.

When you select an item in the upper section of the window, SubCon displays information about the selected item in the lower half of the window. You can add, change and delete information in these fields:

- Quantity
- Unit Price
- Total

The Total field is the product of the quantity and the unit price. You can also change this value, in which case SiteXchange SubCon can recalculate the quantity by dividing the new extended amount by the unit price. If the extended amount for the subcontract item exceeds the extended amount for the contract item, SiteXchange SubCon displays a warning message.

You can also use math formulas to enter information in any numeric field. The formula evaluates immediately when you leave the field and is not stored.

When you have finished entering information for the item, select Save from the File menu to save your work. SubCon automatically checks to make sure you have entered information for all of the item's required fields, and displays an error message if any information is missing. Depending on the whether the item record was created in SiteXchange SubCon or imported from SiteManager, SiteXchange SubCon may also perform these checks on the item quantities you have entered:

- A check to make sure you have not entered an item quantity that exceeds the contract item quantity.

- A check to make sure the quantity you entered does not fall below the amount that was assigned in SiteManager.

- If the subcontractor does not use items, a check to make sure the subcontractor amount does not fall below the amount assigned in SiteManager.

SiteXchange SubCon displays an error message if any of these quantity checks fail.

Subcontract Items Window

Figure 2-7.

Field	Field Description
Item List	
Use?	A check mark indicates that the item is assigned to the selected subcontractor. Checking or un-checking the Use? check box automatically populates the Subcontract this item to this vendor field.
Line	The proposal line item number.
Item	The item code as defined by the Oklahoma Department of Transportation.
Quantity	If the item has not been assigned to any subcontractors, the Quantity field displays the total contract quantity for the item. If the item is assigned to the selected subcontractor, then the Quantity field displays the quantity that is assigned to the subcontractor. Once the item has been assigned to a subcontractor, the Quantity field displays the remaining quantity for the contract. SubCon will not allow for the subcontracted item quantity to be greater than the contract item quantity.
Unit	The pay unit for the item.
Unit Price	If the item has not assigned to the subcontractor, then Unit Price field displays the unit price for the item, as bid by the prime contractor. If the item is assigned to the selected subcontractor, then the Unit Price field displays the unit price for which the prime has subcontracted the item.
Extension	The quantity multiplied by the unit price.
Description	The description for the contract item.
Subcontract Item Details	
Subcontract this item to this vendor	A check mark indicates that the item is assigned to the selected subcontractor. Checking or un-checking the Subcontract this item to this vendor field automatically populates the Use? check box.
Partial Item	This check box indicates that the total contract quantity has been assigned to more than one subcontractor. Items designated as partial items are not included in the quantity checks performed by SubCon.
Vendor	The subcontractor for which items are being assigned.
Line #	The proposal line item number.

Field	Field Description
Item #	The item code as defined by the Oklahoma Department of Transportation.
Description	The description for the contract item.
Quantity	The Quantity field is modifiable if the Use? check box is selected. The quantity subcontracted to the selected subcontractor is entered in this field. If the total subcontracted amount exceeds the contract amount, the message, "Qty over committed" displays to the right of the Quantity field.
Unit Price	The Unit Price field is modifiable if the Use? check box is selected. The unit price for which the prime contractor has subcontracted the item is entered in this field.
Total	The Total field displays the extension for the item subcontracted. This is the quantity multiplied by the unit price.
Notes	Miscellaneous comments may be added to the subcontracted item record in this field.

Subcontractor Items Fields

Table 2-6.

If a Prime Contractor wishes to add or delete item quantities to an approved Subcontractor, then the Prime Contractor may modify the Subcontract in SiteXchange SubCon.

If a Prime Contractor wishes to add additional items to a Subcontractor after the Subcontractor has been approved by the Oklahoma Department of Transportation, then a new Subcontract should be created in SiteXchange SubCon and submitted to the Oklahoma Department of Transportation for approval.

Exercise 2-9

In the following exercise, you will add Items to a Subcontractor in
SiteXchange SubCon.

1. In the **Tree View**, click the + sign to the left of the **APAC-OKLAHOMA, INC** folder.

2. Click the **Subcontractor Items** folder.

    The Items window opens in the right windowpane.

3. Click **Line 0007 (SP) FLY ASH**.

    The details for Item 0007 display in the bottom of the window.

4. Click the **Subcontract this item to this vendor** check box.

    If desired, the Quantity, Unit Price and Total fields may be edited at this time.

5. Click the **Save** button.

6. In the top portion of the window scroll to and click **Line 0008 (SP) LIME**.

7. Click the **Use?** check box in the top portion of the window.

    If desired, the Quantity, Unit Price and Total fields may be edited at this time.

8. Click the **Save** button.

    APAC-OKLAHOMA, INC. has been subcontracted for two items.

2.3.2 Entering Subcontract Items for a DBE

DBE Subcontractors what were admitted as part of the DBE Commitment are included in SiteXchange SubCon. The Prime Contractor should enter the details for the DBE Subcontractor in the Subcontractor Items window.

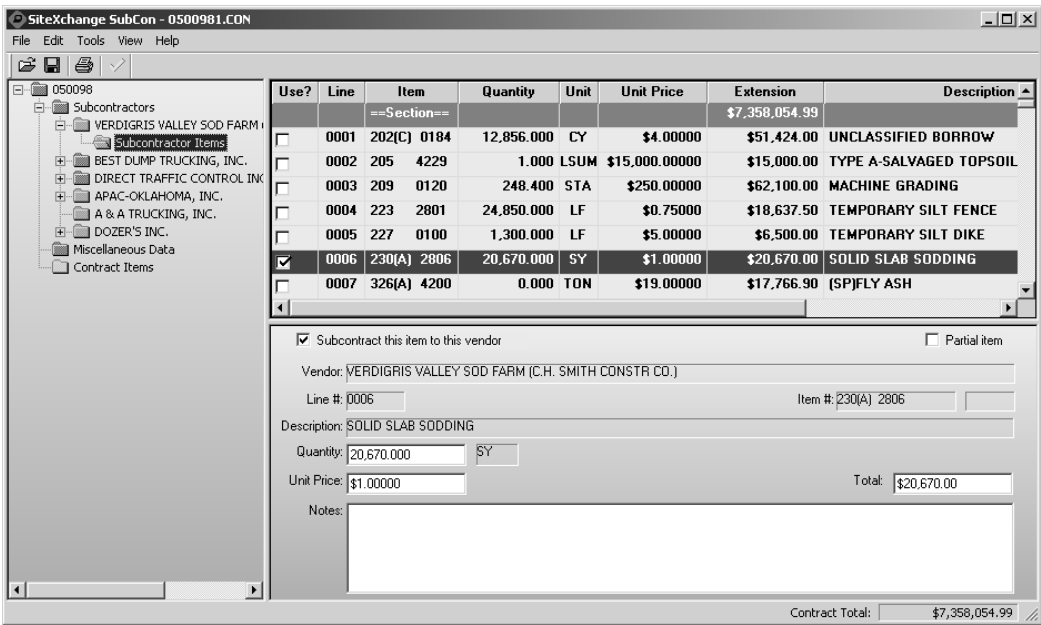**Subcontract Items Window**

Figure 2-8.

Exercise 2-10

In the following exercise, you will add an Item to a DBE Subcontractor in SiteXchange SubCon.

1. In the **Tree View**, click the + sign to the left of the **VERDIGRIS VALLEY SOD FARM** folder.

2. Click the **Subcontractor Items** folder.

   The Items window opens in the right windowpane.

3. Click **Line Item 0006 SOLID SLAB SODDING**.

   The details for Item 0006 display in the bottom of the window.

4. On the bottom portion of the window, click the **Subcontract this item to this vendor** check box.

5. Click the **Save** button.

   VERDIGRIS VALLEY SOD FARM has been subcontracted for one item.

2.3.3 Adding Partial Items

Partial items are items that are not constrained by SubCon's usual quantity checks and whose quantities are not included in determining minimums and maximums. An item may be designated as a partial item when the total quantity for that item is assigned to more than one subcontractor, thereby avoiding what SubCon would otherwise identify as a quantity error.

As an example, suppose one of the items in a contract is 2,000 pounds of asphalt. Two subcontractors are being used, one to supply the asphalt and the other to deliver it to the construction site. You can resolve this situation in one of these two ways:

- By designating the item as a partial item and assigning the total quantity of 2,000 pounds of asphalt to both of the subcontractors. This will not cause an error because SubCon will not include this item in its quantity checks.

To designate an item as a partial item, select the item in the Subcontractor Items window and click the Partial Item check box in the detail area of the window.

Subcontract Items Window

Figure 2-9.

The Partial Item check box should be checked (ON) in the following instances:

- **If the total bid quantity is assigned to more than one Subcontractor. Example: mobilization items.**

- **If a Subcontractor is assigned one portion of the item and another Subcontractor is assigned another portion of the same item.**

When the Partial Item check box is selected, the Prime Contractor should modify the Unit Price field.

Exercise 2-11

In the following exercise, you will add partial items to two Subcontractors in SiteXchange SubCon.

1. In the **Tree View**, click the **Subcontractor Items** folder for **APAC-OKLAHOMA, INC**.

   The Items window displays in the right windowpane.

2. Scroll to and click **Line 0041 COLD MILLING PAVEMENT**.

   The details for Item 0041 are displayed in the bottom of the window.

3. On the bottom portion of the window, click the **Subcontract this item to this vendor** check box.

4. Click the **Partial Item** check box.

5. In the **Unit Price** field, type **.40**.

6. Press the **Tab** key.

   The amount in the Total field changes to $206.40 to reflect the change in the Unit Price field.

7. In the **Notes** field, type **Cold milling work only. Material hauling performed by others.**

   The hauling for Item 0041 was subcontracted to A&A Trucking.

8. Click the **Save** button.

9. In the **Tree View**, click the + sign to the leftt of the **DOZER'S INC** folder.

10. Click the **Subcontractor Items** folder.

    The Items window opens in the right windowpane.

11. Click **Line 0221 MOBILIZATION**.

    The details for Item 0221 are displayed in the bottom portion of the window.

12. On the bottom portion of the window, click the **Subcontract this item to this vendor** check box.

13. Click the **Partial Item** check box.

The Partial Item check box is selected since the entire bid quantity will be assigned to multiple subcontractors.

14. In the **Unit Price** field, type **15,000**.

15. Press the Tab key.

The amount in the Total field changes to $15,000 to reflect the change in the Unit Price field.

16. Click the **Save** button.

2.3.4 Adding the Same Item to Multiple Subcontractors

If the Prime Contractor intends to subcontract the entire quantity of a bid item, the entire quantity should be entered in the Quantity field.

If the Prime Contractor intends to subcontract a portion of the bid item quantity, the subcontracted quantity should be entered in the Quantity field. When saved, the system adjusts the amount to reflect the quantity in the Total field.

Subcontract Items Window

Figure 2-10.

Exercise 2-12

In the following exercise, you will add the same item to multiple Subcontractors in SiteXchange SubCon.

1. In the **Tree View**, click the **Subcontractor Items** folder for **APAC-OKLAHOMA, INC**.

   The Items window opens in the right windowpane.

2. Click **Line 0096 UNCLASSIFIED BORROW**.

   The details for Item 0096 are displayed in the bottom portion of the window.

3. On the bottom portion of the window, click the **Subcontract this item to this vendor** check box.

4. In the **Quantity** field, type **2,500**.

5. Press the **Tab** key.

   In the Total field, the amount for this item changes to $11,980.00.

6. Click the **Save** button.

7. In the **Tree View**, click the **DIRECT TRAFFIC CONTROL** folder.

   DIRECT TRAFFIC CONTROL is a DBE Subcontractor that was part of the original DBE Commitment.

8. In the **Sub Type** drop-down list, click the expand arrow and click **Subcontractor**.

   The folder tab changes from red to green, indicating that all required fields are entered.

9. Click the **Save** button.

10. Click the + sign to the left of the **DIRECT TRAFFIC CONTROL** folder.

11. Click the **Subcontractor Items** folder.

    The Items window opens in the right windowpane.

12. Click **Line Item 0096 UNCLASSIFIED BORROW**.

    The details for Line 0096 are displayed in the bottom portion of the window.

13. On the bottom portion of the window, click the **Subcontract this item to this vendor** check box.

    Note that the remaining bid quantity of 2,995 is shown in the Quantity field and the remaining total is $11,980.00.

14. Click the **Save** button.

2.4 Entering Miscellaneous Data

Prior to submitting the Subcontractor for approval, the Prime Contractor should read the disclaimer regarding the contract in the Miscellaneous Data folder tab and select the appropriate response.

Miscellaneous Data Window

Figure 2-11.

Exercise 2-13

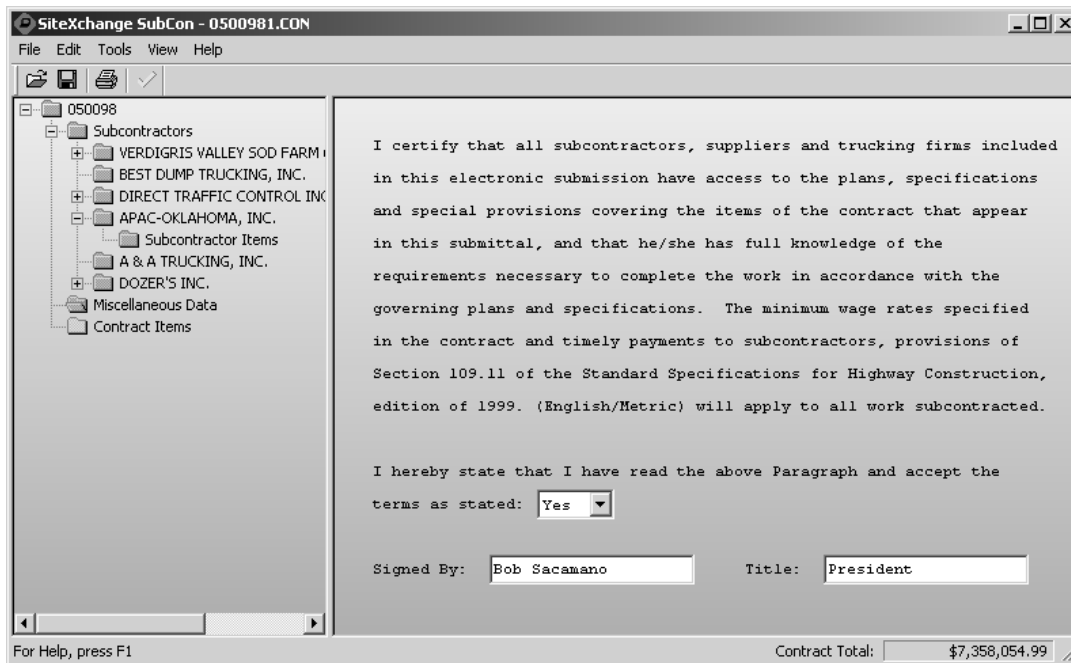In the following exercise, you will add the same item to multiple Subcontractors in SiteXchange SubCon.

1. In the **Tree View**, click the **Miscellaneous Data** folder.

2. Click the drop-down arrow and click **Yes**.

    The Miscellaneous Data folder changes from red to green.

3. In the **Signed By** field, type **Bob Sacamano**.

4. In the **Title** field, type **President**.

5. Click the **Save** button.

2.5 Checking the Contract

SiteXchange SubCon will check the contract and all associated
subcontracts to ensure that all required data is entered in SiteXchange
Subcon. The Check Contract process my be initiated by either clicking the
Check Contract button on the tool bar or by selecting Check Contract from
the Tools Menu.
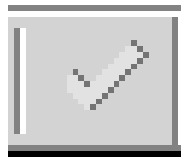
Check Contract Button

Figure 2-12.

If no errors are found during the check contract process, then SiteXchange
SubCon displays the Contract Check message box, which indicates that
the Contract Is Complete.

Contract Check Message Box

Figure 2-13.

If errors are discovered during the check contract process, then the
SiteXchange Error List will display indicating which subcontract contains
errors. This list may be printed by selecting the Print Errors button or
closed by selecting the OK button.
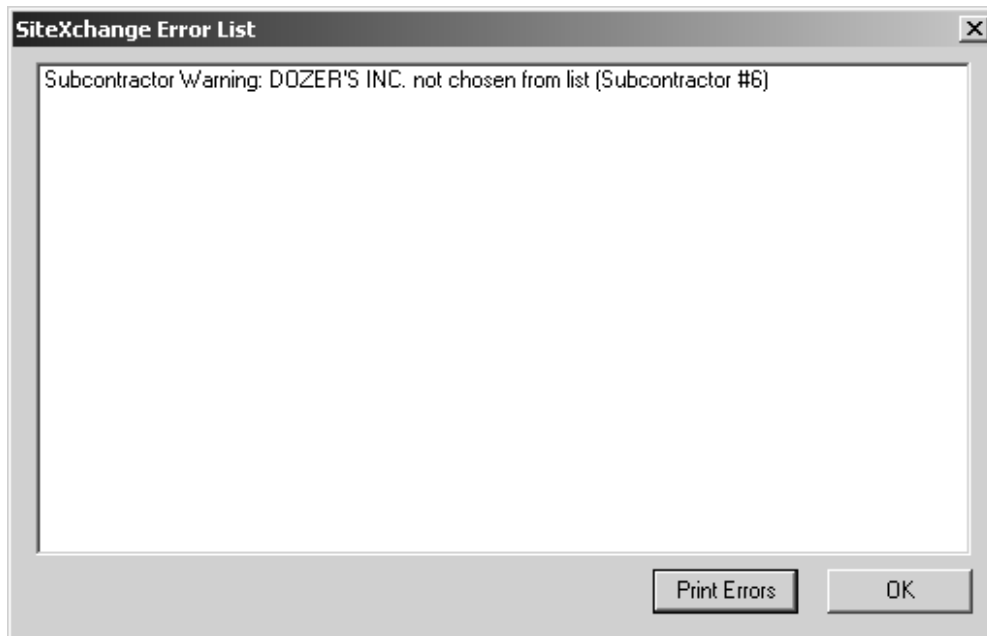
SiteXchange Error List Message Box

Figure 2-14.

The Prime Contractor should check the Contract.con file to ensure there are no errors *before* submitting the Subcontractor to the Oklahoma Department of Transportation for approval.

Note: If the Prime Contractor has added a new Vendor in SiteXchange SubCon, the Subcontractor Warning message will display in the Error List Message Box. Click OK to this message and continue.

 Exercise 2-14

In the following exercise, you will check a contract in SiteXchange SubCon.

1. Click the **Check Contract** button.

   The SiteXchange Error List displays the Subcontractor Warning message for DOZER'S INC. This Subcontractor was added as a new Vendor in a previous exercise.

2. Click the **OK** button to the message.

2.6 Printing the Schedule of Items Report

The Schedule of Items Report is a list of all the subcontractors and items that have been subcontracted on the contract. If errors exist in the contract file, the Contract Error window will be displayed with the errors listed before the report is printed. Printing the Schedule of Items Report provides a hard copy of the subcontracts used on the contract.

```
SUBCONTRACTING SUBMITTAL
Contractor: BECCO CONTRACTORS, INC.
Contractor ID: 731316732
Contract: 050098




Subcontract No.:  1
Subcontractor: VERDIGRIS VALLEY SOD FARM (C.H. SMITH  ID: 731004991
Address: P.O. BOX 97
         CLAREMORE, OK  74018
Line
 No. Description                 Quantity            Price          Amount
-------------------------------------------------------------------------
0006 SOLID SLAB SODDING         20,670.000         $1.00000     $20,670.00
-------------------------------------------------------------------------
                                                   Total:       $20,670.00

Subcontract No.:  2
Subcontractor: BEST DUMP TRUCKING, INC.             ID: 731513541
Address: STAR ROUTE 4, BOX 312
         PRYOR, OK  74362

Subcontract No.:  3
Subcontractor: DIRECT TRAFFIC CONTROL INC.          ID: 731564757
Address: P.O. BOX 602
         MUSKOGEE, OK  74402-0602
Line
 No. Description                 Quantity            Price          Amount
-------------------------------------------------------------------------
0096 UNCLASSIFIED BORROW         2,995.000         $4.00000     $11,980.00
-------------------------------------------------------------------------
                                                   Total:       $11,980.00
```

Schedule of Items Report

Figure 2-15.

> **Printing the Schedule of Items Report is not required. The Prime Contractor may choose to print this report as a record to view what was submitted to the Oklahoma Department of Transportation.**

Exercise 2-15

In the following exercise, you will print the Schedule of Items Report in SiteXchange SubCon.

1. Click the **Print** button.

   The SiteXchange Error List displays the Subcontractor Warning message for DOZER'S INC again.

2. Click the **OK** button to the message.

   The Schedule of Items Report prints to the designated printer.

3. Click the **File** menu and click the **Exit** choice to exit SiteXchange SubCon.

2.7 Sending the SiteXchange SubCon file to ODOT

Once the prime contractor has entered all subcontractors and their items in SiteXchange SubCon, the prime contractor should email the completed Contract.con field to the Oklahoma Department of Transportation email at subcontractrequest@fd9ns01.okladot.state.ok.us.

Before sending the Contract.con file to the Oklahoma Department of Transportation, the Prime Contractor should check the Contract.con file first to ensure there are no errors. In the Tree View, all folders should be green. In addition, the disclaimer on the Miscellaneous Data folder tab should be completed. If email is not available, the Prime Contractor should contact the SiteXchange SubCon Help Desk.

After Subcontractors have been approved, the Oklahoma Department of Transportation will send the Prime Contractor a copy of the Subcontract Approval Letter and an updated Contract.con file will be posted on the Oklahoma Department of Transportation's website.

Section 2 Review

To open a contract file:

1. Click the Open Contract button.

2. Navigate to the Contract file.

3. Click the Open button.

To add a Subcontractor to subcontract items:

1. In the Tree View, click the Subcontractors folder.

2. Right click and select Add Subcontractor.

3. In the Name drop-down list, click the expand arrow and click the desired Subcontractor.

4. In the Sub Type drop-down list, click the expand arrow and click the desired Sub Type.

5. In the DBE Type drop-down list, click the expand arrow and click the desired DBE Type.

6. In the Notes field, type, the desired notes regarding the subcontractor.

7. Click the Save button.

To add a Material Supplier or Trucking Only Subcontractor:

1. In the Tree View, click the Subcontractors folder.

2. Right click and select Add Subcontractor.

3. In the Name drop-down list, click the expand arrow and click the desired subcontractor.

4. In the Sub Type drop-down list, click the expand arrow and click Material Supplier or Trucking Only.

5. In the DBE Type drop-down list, click the expand arrow and click the desired DBE Type.

6. In the Notes field, type, the desired notes regarding the subcontractor.

7. In the Amount field, type the subcontract amount.

8. Click the Save button.

To add a new Subcontractor to the Vendor List:

1. In the Tree View, click the Subcontractors folder.

2. Right click and select Add Subcontractor.

3. In the Name field, type the name of the subcontractor.

4. In the ID field, type the ID number of the subcontractor.

5. In the Address field, type the street address of the subcontractor.

6. In the City field, type the city of the subcontractor.

7. In the State field, type the state of the subcontractor.

8. In the Zip field, type the zip code of the subcontractor.

9. In the Sub Type drop-down list, click the expand arrow and click the sub type of the subcontractor.

10. In the DBE Type drop-down list, click the expand arrow and click the DBE type of the subcontractor.

11. In the Notes field, type any applicable notes that pertain to the subcontractor.

12. Click the Save button.

To delete a Subcontractor:

1. In the Tree View, click the desired Subcontractor folder.

2. Right click and select Delete Subcontractor.

3. Click the Yes button.

4. Click the Save button.

To subcontract items to a Subcontractor:

1. In the Tree View, click the + sign to the left of the desired Subcontract folder.

2. Click the Subcontractor Items folder.

3. Click the desired item.

4. Click the Subcontract this item to this vendor check box.

5. Modify the Quantity, Unit Price, or Total fields as desired.

6. Click the Save button.

To subcontract partial items to a Subcontractor:

1. In the Tree View, click the + sign to the left of the desired Subcontract folder.

2. Click the Subcontractor Items folder.

3. Click the desired item.

4. Click the Subcontract this item to this vendor check box.

5. Click the Partial Item check box.

6. Modify the Quantity, Unit Price, or Total fields as desired.

7. Click the Save button.

To enter Miscellaneous Data:

1. In the Tree View, click the Miscellaneous Data folder.

2. Click the drop-down arrow and click the desired choice.

3. In the Signed By field, type the name of the individual who signs the disclaimer.

4. In the Title field, type the title of the individual who has signed the disclaimer.

5. Click the Save button.

To check the Contract:

6. Click the Check Contract button on the tool bar.

7. Click the OK button to the Contract is Complete message

OR

8. Click the OK button to the SiteXchange Error List.

To Print the Schedule of Items Report:

1. On the Subcontractor window, click the Print button.

2. Click the OK button. The Schedule of Items Report prints to the designated printer.

To send the SubCon file to the Oklahoma Department of Transportation:

1. Email the completed Contract.con filed to the Oklahoma Department of Transportation.

2. If email is not available, contact the SiteXchange SubCon Help Desk at (405) 521-2561.

After Subcontractors have been approved, the Oklahoma Department of Transportation will send a copy of the Subcontract Approval Letter to the Prime Contractor.

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