

Quick Reference Guide

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Reviewed for Version:

Attaching An Electronic Document To A SiteManager Window

The attachment functionality of SiteManager allows electronic documents to be attached to certain records within the system. Attachments can be associated to the following SiteManager windows:

- Material Test Templates
- DWR Templates
- Contracts
- Contract Estimate History
- Correspondence Log
- Change Order Header
- DWR - Record Work Item
- Maintain Sample - Additional Sample Data
- Contract Adjustments
- Contract Time Adjustments
- Line Item Adjustments

For example, you could create a spreadsheet which calculates the pavement smoothness deduction for rough pavement. This spreadsheet could then be attached to the Contract Adjustments window to support the deduction imposed on that window.

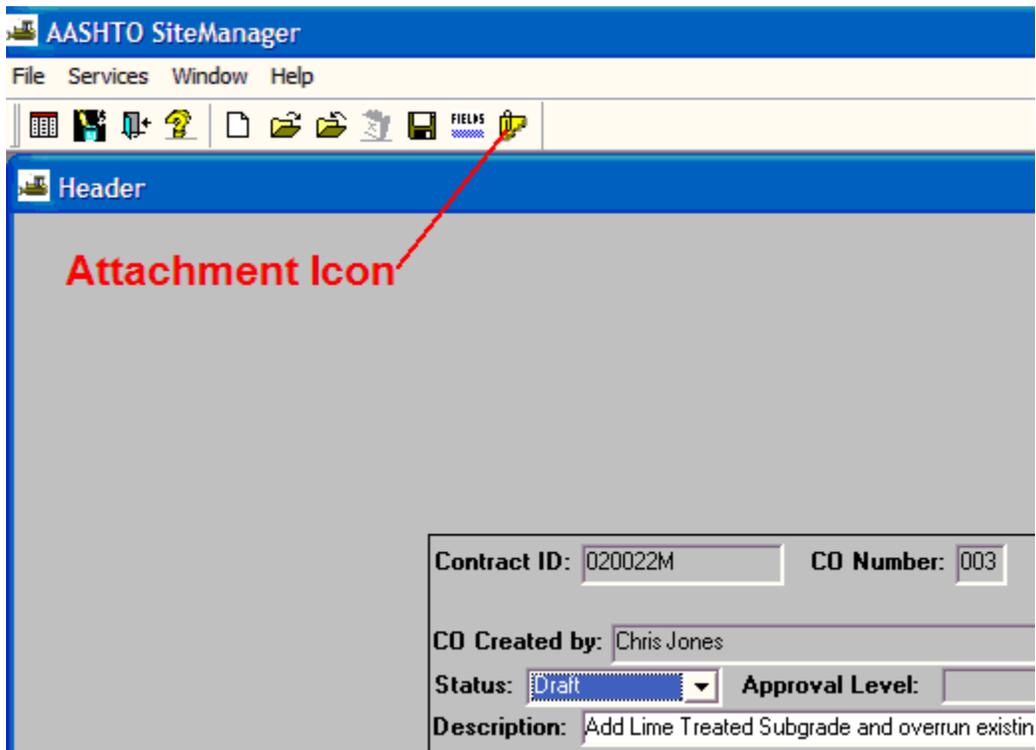
The only limitation to any attachment is that it must be read by the applications installed on ODOT machines. Refer to Policy & Procedure 801.1D - Change Order Attachments for additional information.

Attaching Electronic Documents To A SiteManager Window

The best way to illustrate the steps required to associate an electronic document is by example. In the following example, a zero dollar change order has been created which modifies a provision in the contract. The change order explanation references an attachment. The document that will be attached is in Adobe Acrobat format.

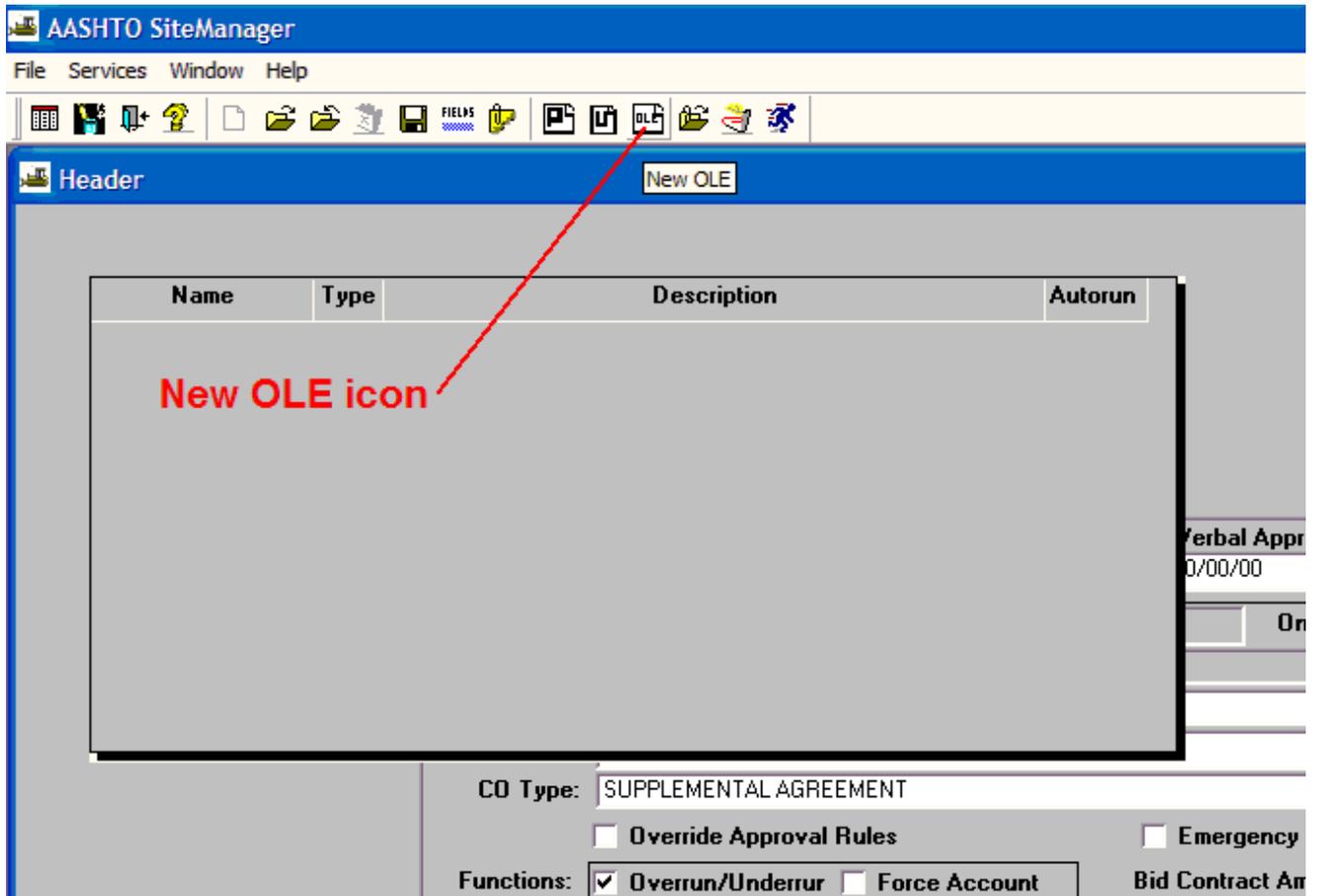
Step 1

Navigate to the appropriate window (in this case the Change Order Header window) and select the appropriate change order record. Click the attachment icon on the menu bar. The attachment window will appear.



Step 2

Click the New OLE icon. The OLE attachment definition screen will appear.

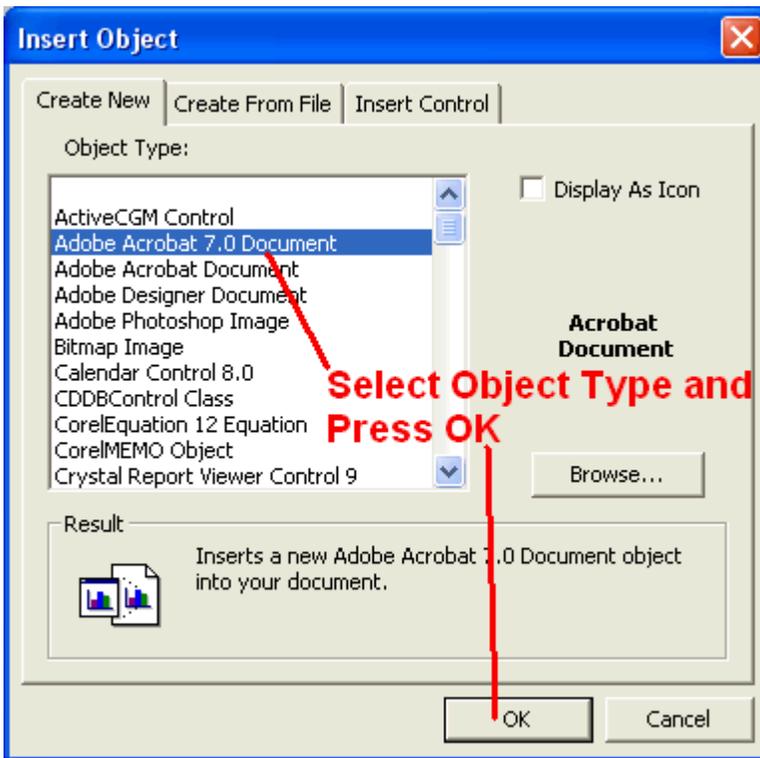


The screenshot shows the AASHTO SiteManager application window. The title bar reads "AASHTO SiteManager". The menu bar includes "File", "Services", "Window", and "Help". The toolbar contains various icons, including a "New OLE" icon. The main window area is titled "Header" and contains a table with the following columns: "Name", "Type", "Description", and "Autorun". The text "New OLE icon" is written in red in the "Name" column. A red arrow points from the "New OLE" button in the toolbar to the "New OLE icon" text. Below the table, there are several fields and checkboxes:

- CO Type: SUPPLEMENTAL AGREEMENT
- Override Approval Rules
- Emergency
- Functions: Overrun/Underrun Force Account
- Bid Contract Ar

Step 3

On the Create New tab select the appropriate Object Type and Click OK to open up the Browse window. (Note: If it's a PDF, select Adobe Acrobat Document. If it's a XLS, select Microsoft Excel Spreadsheet, etc.)



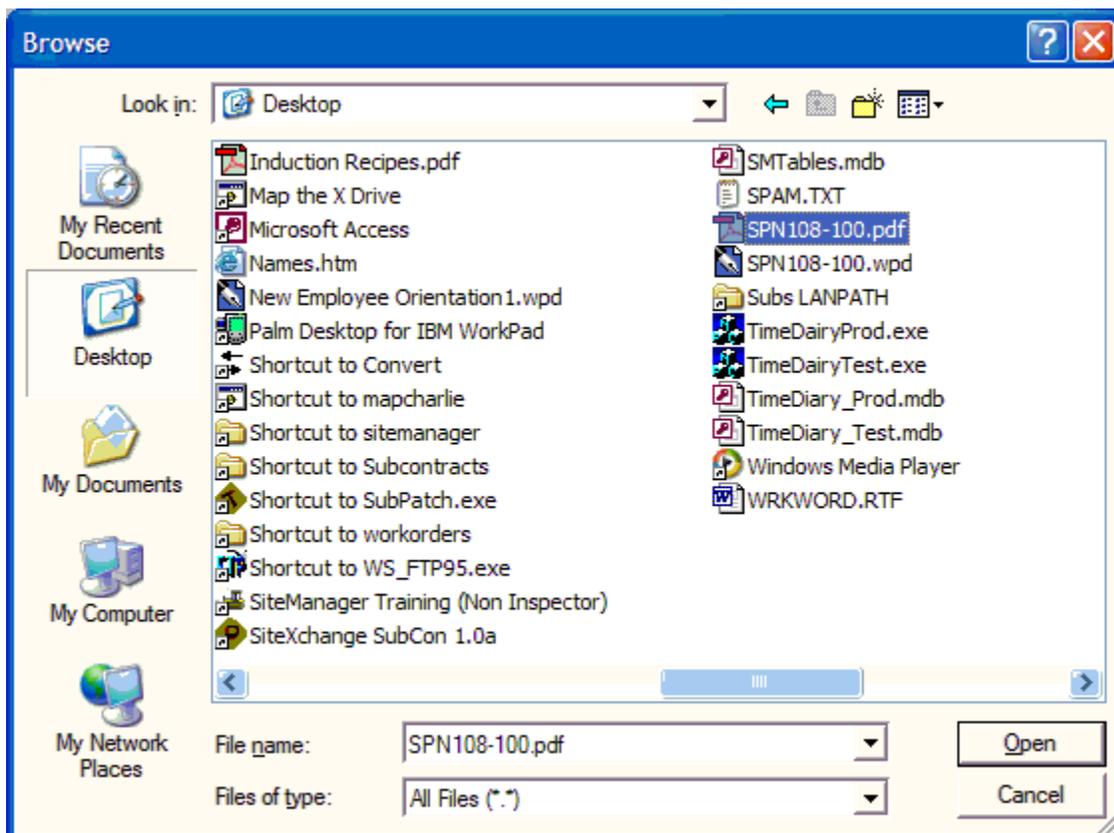
Step 4

Locate the file you wish to attach, highlight it and click the open button.

If you are using Terminal Services (Satellite SiteManager) you may need to set up your local resources. This is so you can access the files on your local machine.

Setting up Local Resources Instructions

Right click on Terminal Services icon (Satellite SiteManager icon) on your desktop. Click Edit. Click on the Local Resources tab. Down at the bottom is Local Devices and Resources. Click on More. In the big white box is a list of resources and one of them is Drives. You can either check that box for all local drives or expand it out and choose only the ones you want.

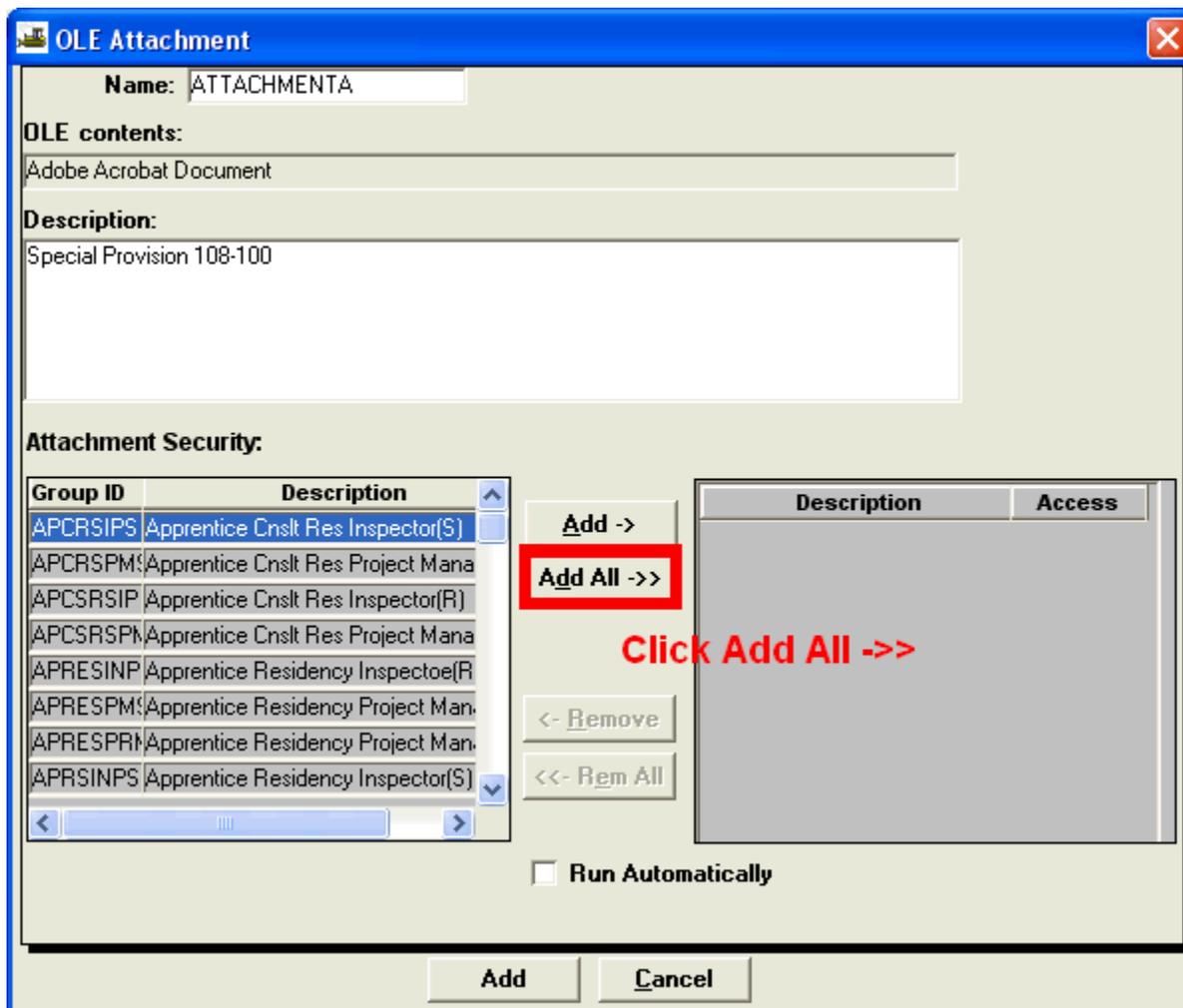


Step 5

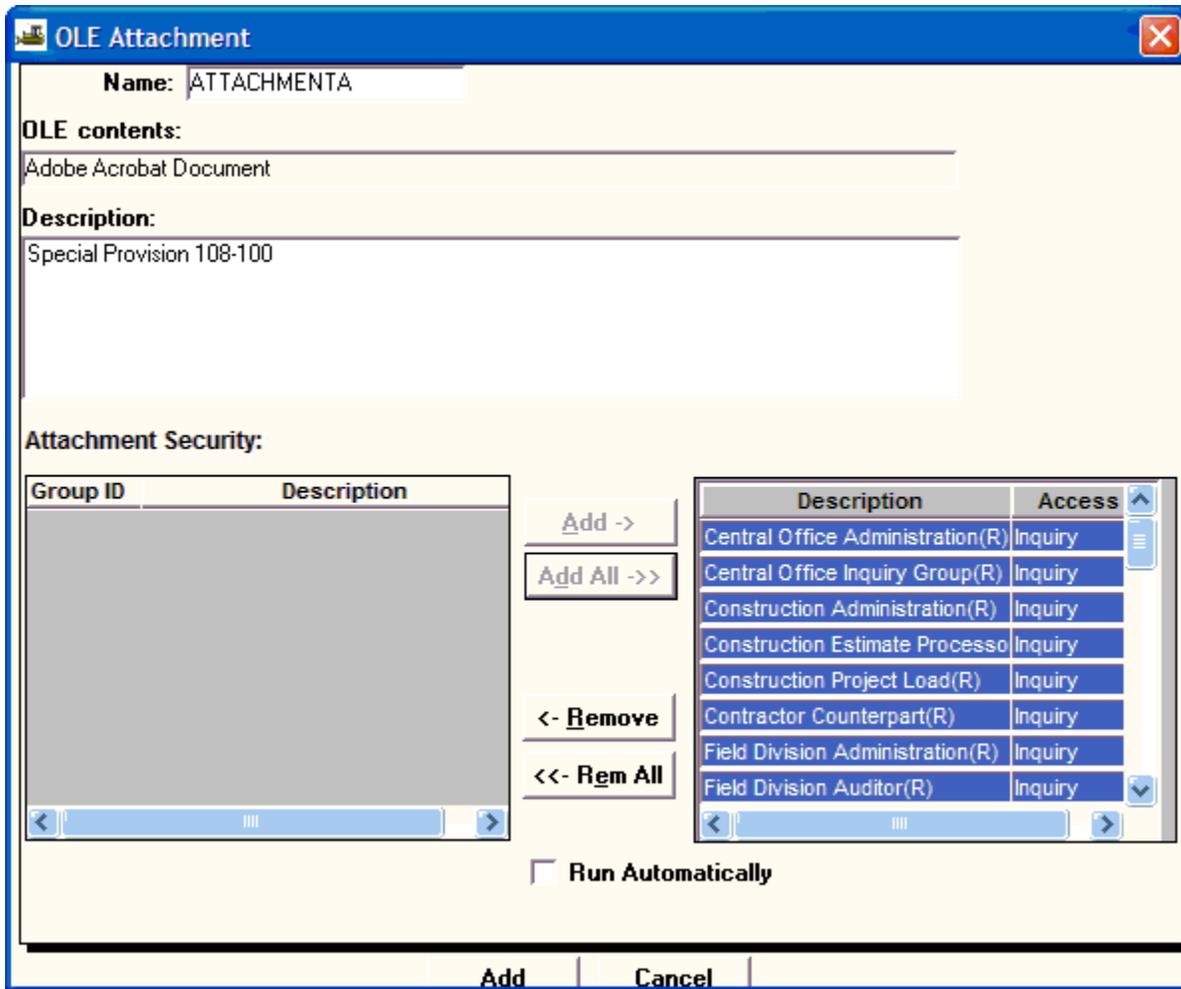
In the Name field, give the attachment a name. Since the document was referred to as Attachment A in the change order explanations, it follows that the name of the document be called ATTACHMENTA. **Do not use hyphens, spaces, quotations, decimals or any other character not allowed in windows filenames-only use letters or numbers.**

In the Description field, add text that explains the attachment and defines its purpose.

Click the Add All ->> button that is located in the center of the window.



Click the Add button at the bottom of the window. The attachment window will reappear.



The image shows a dialog box titled "OLE Attachment" with a close button in the top right corner. The dialog is divided into several sections:

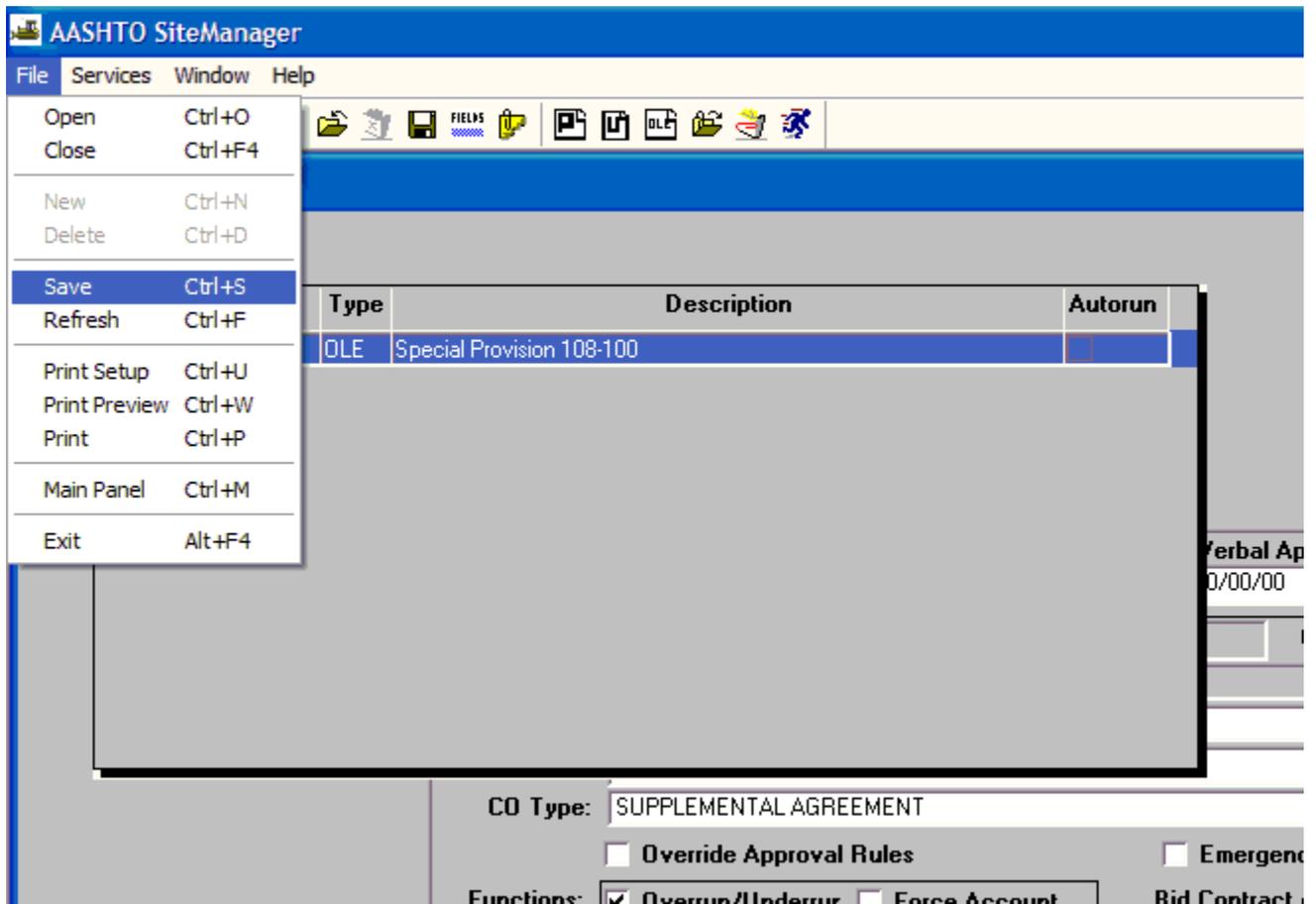
- Name:** A text field containing "ATTACHMENTA".
- OLE contents:** A text field containing "Adobe Acrobat Document".
- Description:** A text field containing "Special Provision 108-100".
- Attachment Security:** This section contains two tables and several buttons.
 - Left Table:** A table with two columns: "Group ID" and "Description". It is currently empty.
 - Buttons:** Between the two tables are four buttons: "Add ->", "Add All ->>", "<- Remove", and "<<- Rem All".
 - Right Table:** A table with two columns: "Description" and "Access". It contains the following rows:

Description	Access
Central Office Administration(R)	Inquiry
Central Office Inquiry Group(R)	Inquiry
Construction Administration(R)	Inquiry
Construction Estimate Processo	Inquiry
Construction Project Load(R)	Inquiry
Contractor Counterpart(R)	Inquiry
Field Division Administration(R)	Inquiry
Field Division Auditor(R)	Inquiry
- Run Automatically:** A checkbox that is currently unchecked.
- Bottom Buttons:** "Add" and "Cancel" buttons.

Step 6

From the menu bar choose File>Save.

Click the attachment icon.



At this point the attachment has been saved in the SiteManager database and is available for viewing by other SiteManager users.

Updates

08/14/08: Added language to **Step 4**, setting up local resources for terminal services.