

Quick Reference Guide

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Reviewed for Version: SiteManager 3.1a-2

Generating A Customized Report From Process Lists

There have been several customized reports created for ODOT that display data held within the SiteManager database. Depending on the limitations of your SiteManager security group, the reports can be generated by users and are found on the various Process Lists within SiteManager. The following is a listing of all the areas of SiteManager that may contain a Process List:

- System Administration
- Contract Administration
- Daily Work Reports
- Pipeline & Zip
- Contractor Payments
- Change Order
- Civil Rights
- Materials Management

All customized reports will be generated, viewed, and printed from your computer's default web browser. Your default web browser must be Internet Explorer. To make your computer's default web browser Internet Explorer, read the QRG "SiteManager Default Browser-Internet Explorer".

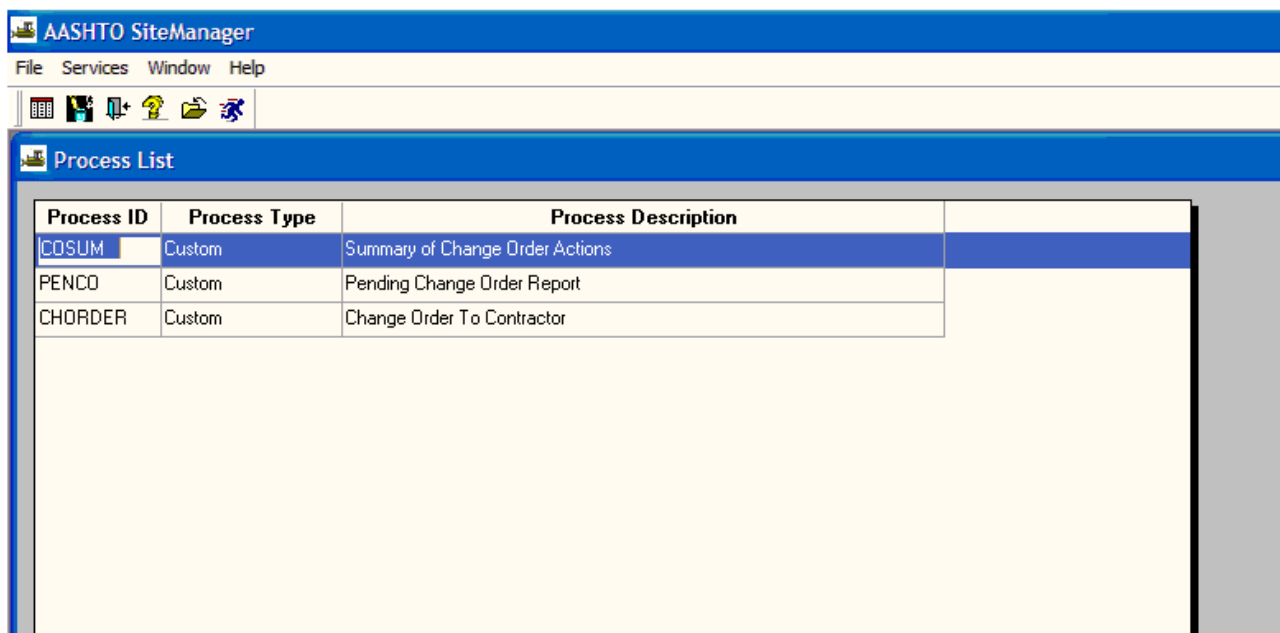
The procedure to create a customized report is essentially as follows:

1. Determine the subset, required parameters, and printing mode necessary to run the report. Refer to the associated Process List Policy & Procedure for this information.
2. Navigate to the SiteManager Process List which contains the report you wish to generate.
3. Run the process.


Here is an example of how you generate a customized report from a Process List in SiteManager. In this example, the Summary of Change Order Actions Report will be generated.

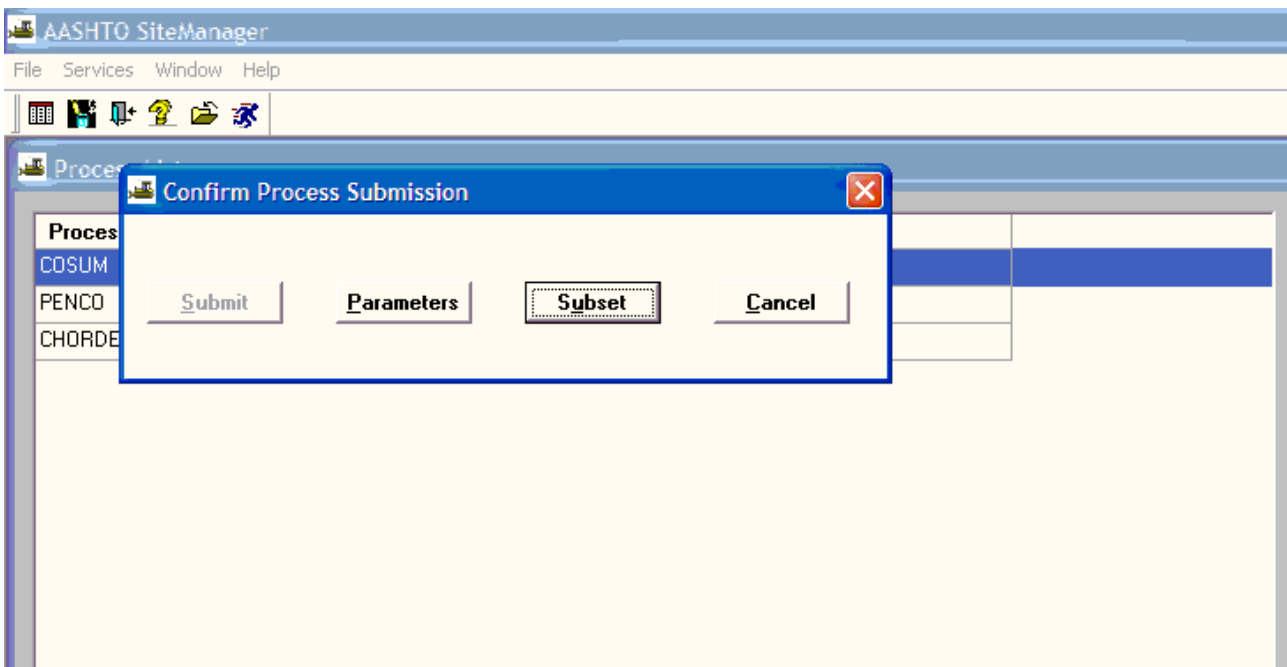
1. [Read the SiteManager Policy & Procedure to determine the subset, the parameters required, and the mode in which the report is designed to be printed. The Policy & Procedure will also contain a table which identifies which security groups have been granted the ability to generate the report.](#)
 - *In this example, the "Summary of Change Order Actions Report" is found on the Change Order Process List. The subset, parameters, and printing mode for this report is identified in Policy & Procedure 804.0-Process List. This policy states that the subset is Contract, there are no parameters, and the printing mode is portrait. Keep this information in mind as you continue with the steps to generate the report.*

2. Navigate to the Process List which contains the report you want to generate.
 - For this example, navigate to the Change Order Process List (Change Order>Process List). The screen will look similar to the following:

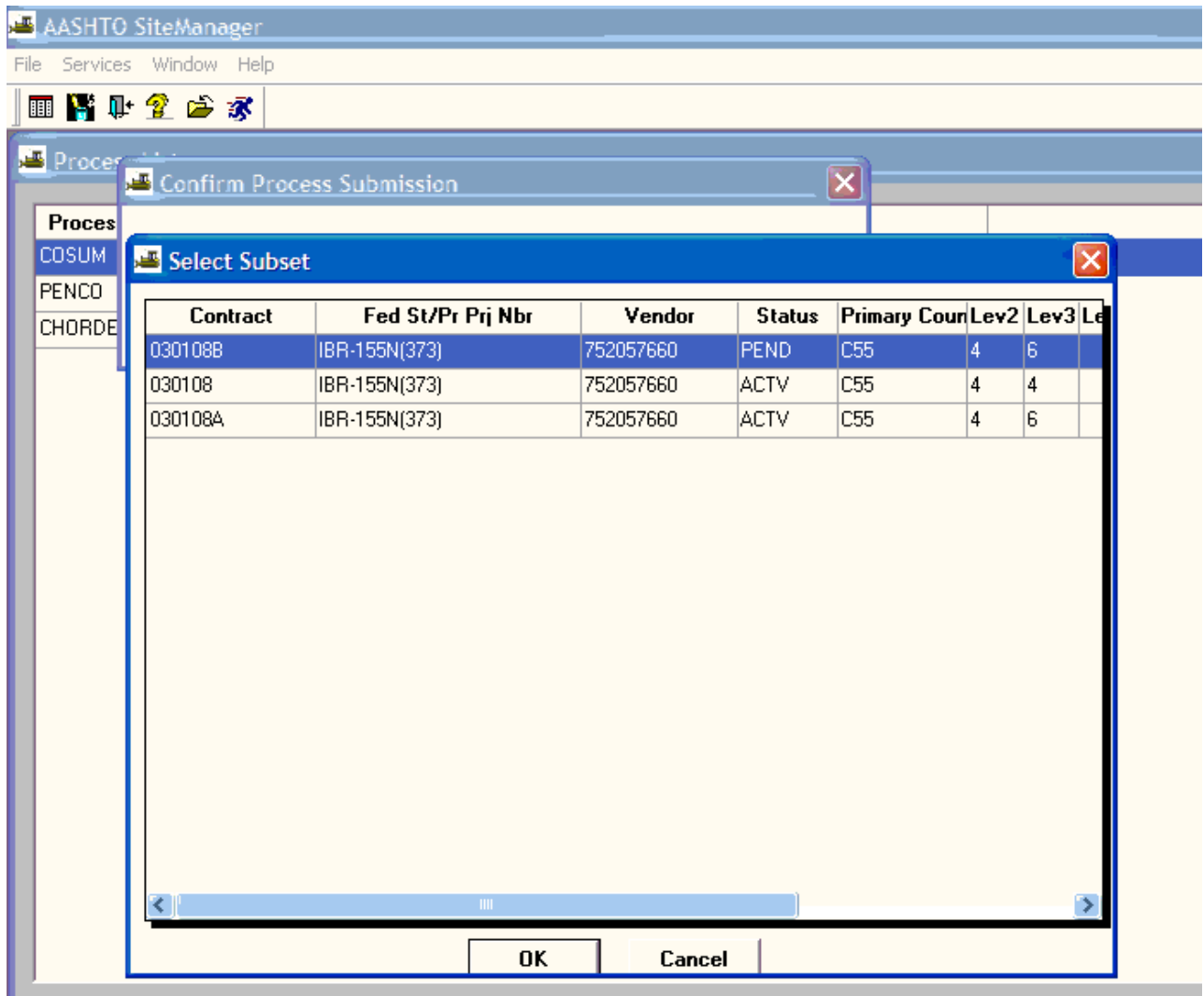


3. Run the process.

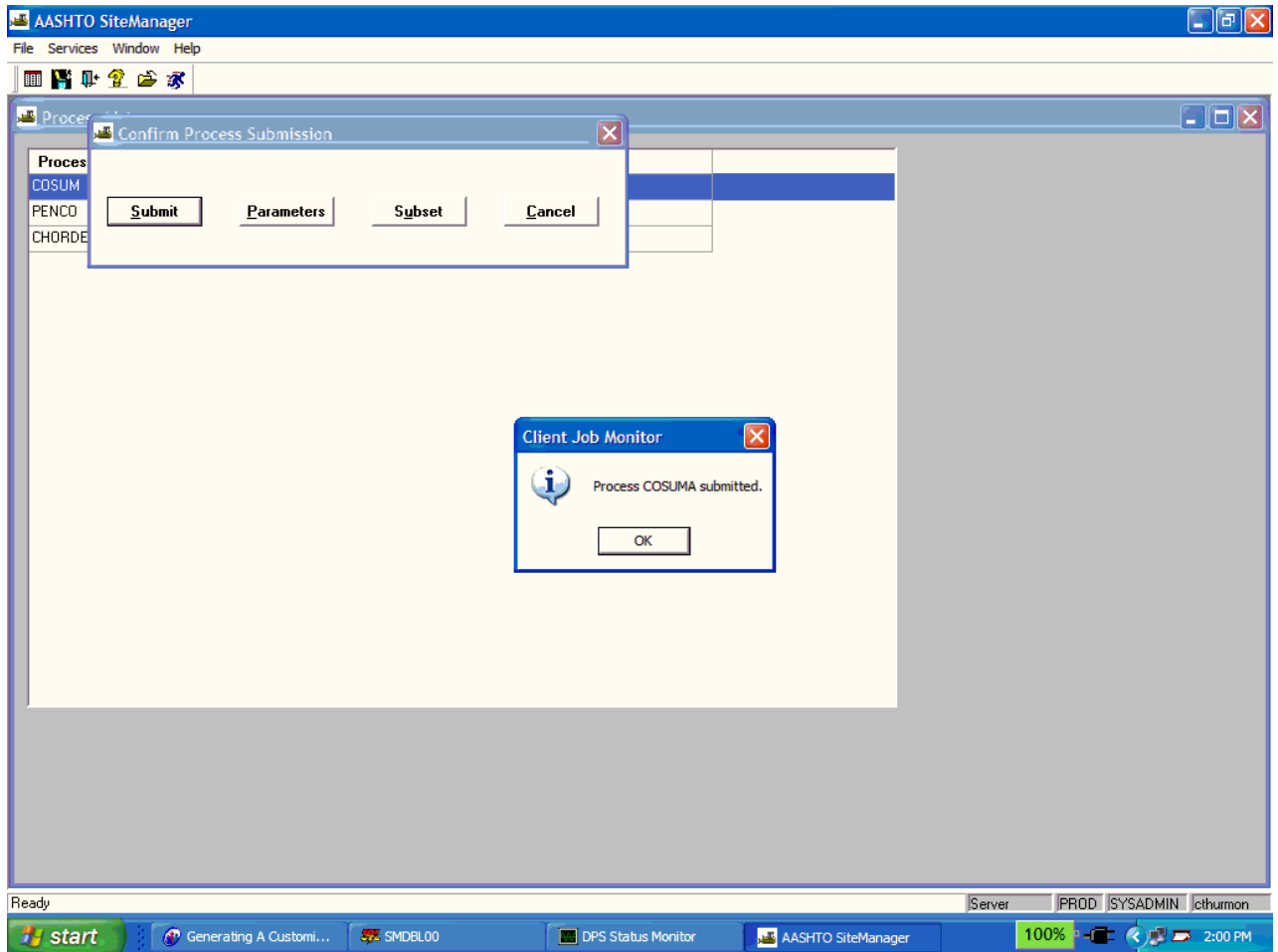
- For this example, make sure the "Summary of Change Order Actions" report is highlighted and click the running man on the toolbar . This will bring up a confirmation screen:



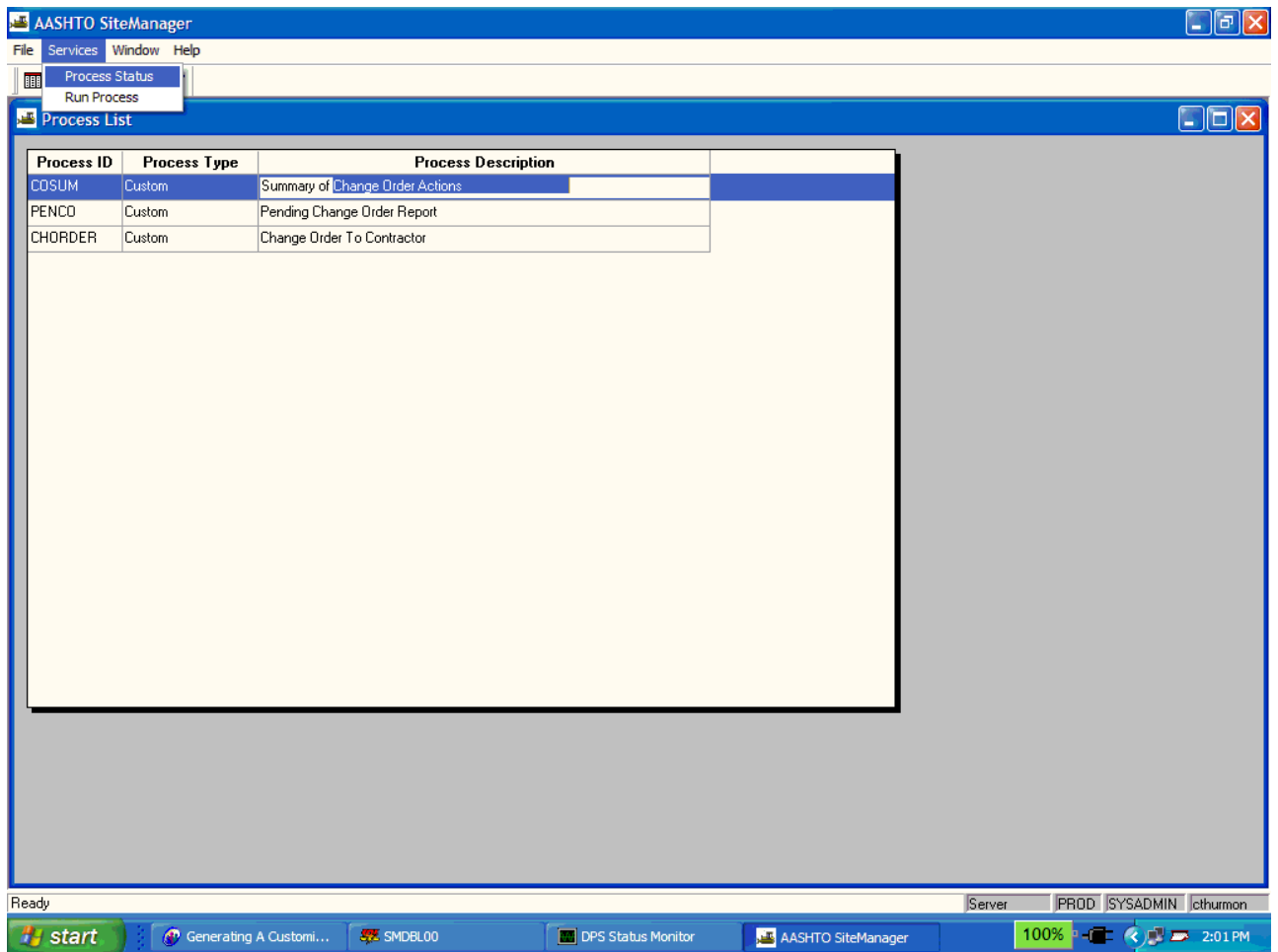
- Click the **Subset** button. This will bring up another screen in which you will select the subset (contract). Make sure the appropriate contract is selected and click the **OK** button at the bottom of the window.



- Click the submit button. The system will give you confirmation that the process has been submitted for generation. Note the process name and click the OK button.



- Click the Services menu on the Process List window and select the Process Status.



- This window identifies the processes that have been completed or are currently running. When the process completes, you will get a confirmation message from the system. Click the OK button on the confirmation and then double-click the process-in this case, double-click the COSUMA process.

The screenshot shows the AASHTO SiteManager application window. The 'Process Status' sub-window is active, displaying a table of processes. The table has columns for Process Name, Status, Date Submitted, Queue Time, Start Time, and End Time. The processes listed are COSUMA (Process Running), USERSECA (Completed), USERSECB (Completed), USERSECD (Completed), and USERSECC (Completed). A 'DPS Status Monitor' dialog box is overlaid on the table, displaying an information icon and the message 'Profile COSUMA for process COSUM has completed', with an 'OK' button.

Process Name	Status	Date Submitted	Queue Time	Start Time	End Time
COSUMA	Process Running	10/28/2003	02:01 pm	02:01 pm	00:00:00
USERSECA	Completed	10/16/2003	11:27 am	11:27 am	11:39 am
USERSECB	Completed	10/16/2003	11:27 am	11:27 am	11:39 am
USERSECD	Completed	10/16/2003	11:28 am	11:28 am	11:40 am
USERSECC	Completed	10/16/2003	11:28 am	11:28 am	11:40 am

DPS Status Monitor

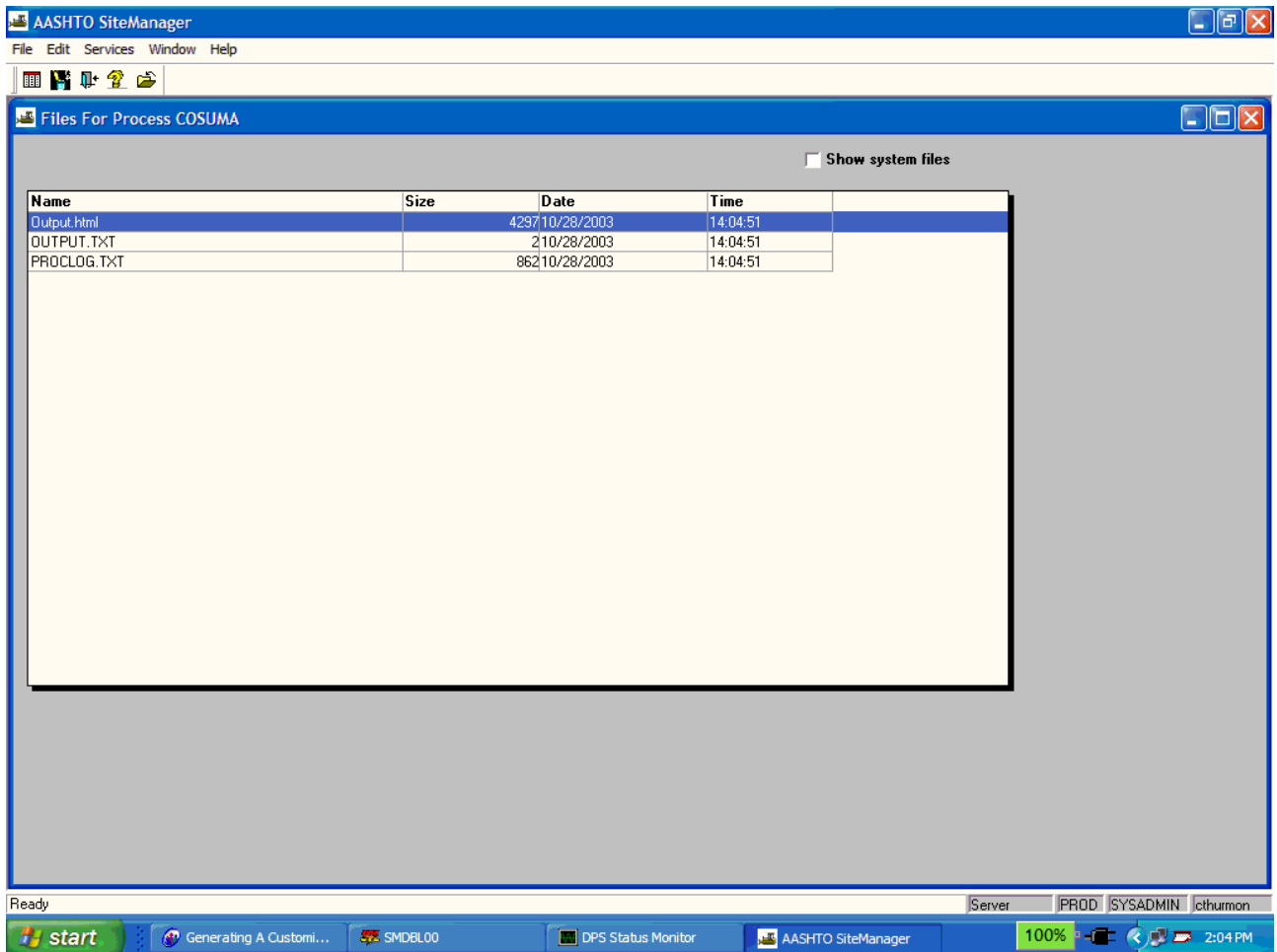
Profile COSUMA for process COSUM has completed

OK

Ready Server PROD SYSADMIN jthurnon

start Generating A Customi... SMDBL00 DPS Status Monitor AASHTO SiteManager 100% 2:04 PM

- After double-clicking the process in the Process Status window, a window will appear with the report output. Double-click the Output.html file on this window. Since all reports have been generated in HTML format, the report will be viewed in your default web browser.



- Here is what the report looks like in the web browser. At this point you can print the report from your web browser or, you can save the html file somewhere and email it to whomever. This particular report is designed to be printed in portrait mode from your web browser. Refer to the Process List Policy and Procedure for the appropriate printing mode.

Oklahoma Department of Transportation
Summary of Change Order Actions
 October 28, 2003

Contract ID	030108	Primary Job Piece	2032104
Contract Description	BRIDGE REDECKING AND REHAB. I-40; BRIDGES OVER I-44(EASTBOUND AND WESTBOUND). PROJECT LENGTH = 0.00 MILE		
Primary County	OKLAHOMA	Federal Aid Number	IBR-155N(373)
Bid Amount	\$400,792.45		
Current Contract Amt.	\$400,792.45		
Prime Contractor	GIBSON & ASSOCIATES, INC.		

Change Order Number	Change Order Description	Status	Change Order Amount
001	Add Bridge Repair Items	DRAF	\$0.00
TOTAL APPROVED CHANGE ORDER AMOUNT			\$0.00
TOTAL UNAPPROVED CHANGE ORDER AMOUNT			\$0.00
TOTAL CHANGE ORDER AMOUNT			\$0.00

The screenshot shows a web browser window with the address bar displaying a local file path. The report is rendered in a standard HTML format with tables and bold text for headers. The browser's status bar at the bottom indicates the system is 'Ready' and shows various taskbar icons and a clock reading 2:05 PM.