

User Guide Supplement for Construction Closeout Information and

Final Project Review Report

APCM 4.1 – CAS 5.6e Rev. September 23, 2020

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Introduction

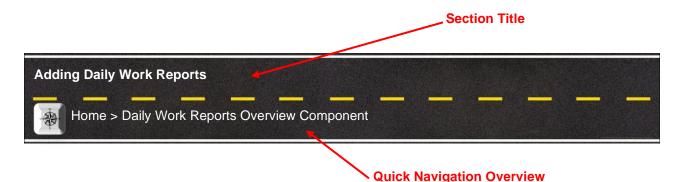
Welcome to AASHTOWare Project Construction & Materials, a fast, easy-to-use, webbased system for documenting construction progress, initiating contractor payment, and communicating with your agency's central office administration applications. Construction & Materials focuses on refining the work flow of construction contract management at all agency levels. With Construction & Materials, the field office can manage field-gathered data and then interface with a central office. Construction & Materials allows several users to update contract information, and it implements a shared database to expand an agency's data sharing ability. This user's guide is the key to discovering Construction & Materials' vast capabilities and is a valuable resource both for novice and experienced users.

About This Manual

This document uses different graphics and techniques to help identify important information.

Section Headers

Each section header will have a title followed by a quick navigation overview as shown below:



Sticky Notes

Throughout the user's guide we have placed sticky notes with important information, tips and best practices that will help you use the system.



Use of Font Styles

• Italicized text is used in each section to give general information and comments about the

system and topic to be discussed.

- Normal text is used for directions and steps listed to accomplish the specified task.
- Bold text is used to emphasize navigation steps and actions within a set of directions

Example:

This is an example section of the user's guide that shows the use of different font styles.

1. Click the component Actions button and choose the Select Contract to Add DWR action.

| ✓ Daily Work Report Overview | | ? |
|---|----------------------------|----------|
| | Actions | × |
| Q Type search criteria or press Enter Advanced | Select Contract to Add DWR | |
| | Historical Reports | ose All |
| | Daily Work Report | bse All |
| Enter search criteria above to see results or Show first 10 | | |

AASHTOWare Project System Requirements

AASHTOWare Project software is a web-based system that requires no special software installation by the end user. System updates and installations are completed by central office information technology staff. The system is accessed through a modern internet web browser which generally comes already installed with new computers. One of the following web browsers is required to access the system:

- Microsoft Internet explorer 11*
- Google Chrome
- Microsoft Edge

*If you are using a State of Michigan computer supplied by DTMB please complete the following steps to ensure that the correct Microsoft Internet Explorer settings are activated:

- 1. Open Internet Explorer 11 and verify the following:
 - a. Set Compatibility View
 - i. From the Tools menu, select **Compatibility**
 - View Settings.
 - 1. If the Menu bar is not shown, right-click on the Menu Bar and select **Menu Bar**.
 - ii. The browser opens a Compatibility View Settings dialog window.
 - iii. In the Compatibility View Settings window, clear the **Display intranet sites in Compatibility View** check box.
 - iv. Click Close.
 - b. Set Internet Options
 - i. From the Tools menu, select Internet Options.
 - 1. The browser displays the Internet Options dialog box.

These steps only need to be performed once for each SOM computer or workstation that you use.

- ii. On the General tab and under the Browsing History section, click the **Settings** button.
 - 1. The browser displays the Website Data Settings dialog box.
- iii. On the Temporary Internet Files tab and under the 'Check for newer versions of stored pages setting', click **Every time I visit the webpage** option.
- iv. Click OK.
- v. Click the Advanced tab.
 - 1. In the Settings box, scroll down to the Security section, and ensure the **Enable DOM Storage** option is selected.
- vi. Click OK.
- vii. Close your Internet Explorer so the new settings will take effect.

Support

For questions regarding the AASHTOWare Project Construction & Materials software, please contact the Construction Technology Helpdesk by phone at 517-322-1556 or by email at <u>MDOT-ConstructionSoftware@michigan.gov</u>. AASHTOWare ACCESS

AASHTOWARE ACCESS



MILogin is the State of Michigan Identity, Credential and Access Management (MICAM) solution. The MILogin solution provides enhanced single sign-on capabilities in addition to meeting many other business requirements and security and compliance needs.

Every user of AASHTOWare Project Construction & Materials accesses the system through MILogin.

State of Michigan Employees and other users with an "@michigan.gov" email account can access MILogin through the following link: <u>https://miloginworker.michigan.gov/</u>

Consultants, Contractors, Local Agency staff, and other Third-Party users can access MILogin through the following link: <u>https://milogintp.michigan.gov/</u>

Requesting AASHTOWare Access

- 1. Login to your MILogin account.
- 2. Select the Request Access button in the top banner.



| Michigan .gov | | | | HELP | CONTACT US |
|-----------------------|----------------|----------|--|------|------------|
| MILogin for Work | ers | | | | |
| HOME 👌 REQUEST ACCESS | UPDATE PROFILE | € LOGOUT | | | |

- 3. Use the search box and enter AASHTOWare Project
- 4. Select **AASHTOWare Project** from the list of applications that appears.
- 5. Follow any remaining on-screen directions.

Once your request is approved you will receive a confirmation email.

User Roles

MILogin > AASHTOWare Project

To protect the confidentiality of the information contained inside, the system only displays the information and actions for which a logged-on user has been assigned access rights by means of user roles. User roles combine the permissions needed for several related tasks and allow MDOT to efficiently provide agency and non-agency users with access to the parts of the system they need.

Keep in mind that newly assigned roles do not appear on the Home menu until the next time the user logs on or refreshes the page. User roles are assigned by the help desk. To modify your existing roles please contact the help desk: <u>MDOT-</u> <u>ConstructionSoftware@michig</u> an.gov



| Name | Description | Examples |
|----------------------|--|----------|
| Action Menu Button | Display the list of available actions, processes, reports, etc. | |
| Chevron Symbol | Collapse or expand components and rows | ✓ > ✓ > |
| Return to Top Button | Return to the top of the page | ^ |
| Help Button | Opens the system help window | 88 |
| Search Field Symbol | Designates the field as a search field, records can be searched and filtered | Q |
| Clear Search Button | Removes any search filters that may be active | _ |
| Log off Button | Logs you off and closes the browser window | Ċ |

GENERAL NAVIGATION



The Home Dashboard is the first screen you seen when you log into the system. Each screen in the system is made up of 4 main parts. The Global Menu, Quick Links, Page Title, and Components.

Global Menu

The global menu is on every screen in the system. It allows you to easily navigate the system.

- 1. The following buttons are available:
 - a. Home Button This button takes you back to the Home Dashboard.
 - b. Home Action Menu This action menu allows you to change your role.
 - c. **Previous Button** This button acts like the back button on a web browser and takes you back to the previous page.
 - d. **Previous Action Menu** This action menu lists your most recently visited pages and allows you to quickly navigate back to a page you visited.
 - e. **My Pages Button** This button takes you to a page that lists your bookmarked pages.
 - f. **My Pages Action Menu** This menu allows you to quickly access your bookmarked pages and also allows you to bookmark a page.
 - g. Global Actions Menu The menu allows you to access the Global Actions Menu.
 - h. Help Button This button opens the system help.
 - i. Log Off Button This button logs you out of the system and closes your browser window.

| Home Previous My Pages | Actions | ? Help | U Log off |
|---|---------|------------------|--------------|
| On this page: Announcements Reference Data Construction Materials MDOT Help Information | | | |
| PROJECT MDOT Office Technician | | | |
| ✓ Announcements | | | ▼ ? |
| Q Type search criteria or press Enter Image: Advanced Showing 2 of 2 | | | 0 changed |

Quick Links

Quick Links are shortcuts provided on every page that will help you quickly navigate the system. Quick Links also change depending on what page you are viewing. Quick Links take you to a specific part of the existing page or a completely different page within the system.

| Home Previous My Pages | Actions | ? Help | U Log off |
|---|---------|------------------|--------------|
| On this page: Announcements Reference Data Construction Materials MDOT Help Information | | | |
| PROJECT MDOT Office Technician | | | |
| ✓ Announcements | | | - ? |
| Q Type search criteria or press Enter Image: Advanced Showing 2 of 2 | | | 0 obongod |

Page Title

Every page has a page title under the Quick Links Section. This lets you know what screen you are on. If you are on the Home Dashboard the page title displays your active role.

| Home Previous My Pages | Actions | ? Help | U Log off |
|---|---------|------------------|--------------|
| On this page: Announcements Reference Data Construction Materials MDOT Help Information | | | |
| PROJECT MDOT Office Technician | | | |
| ✓ Announcements | | | - ? |
| Q Type search criteria or press Enter Image: Advanced Showing 2 of 2 | | | 0 changed |
| > | | | • |

Components

Each page is made of individual components. Each component can have several of its own buttons and menus. They can be expanded or collapsed. They may have their own action menu and help button. They can also have search fields used to filter and sort records that are displayed within the component.

| Home Previous My Pages | | | Actions | ? Help | U Log off |
|--|-------------|---|---------|------------------|--------------|
| On this page: Announcements Reference Data Construction Mate | erials N | MDOT Help Information | | | |
| PROJECT MDOT Office Technician | | | | | |
| ✓ Announcements | | | | | - ? |
| Q Type search criteria or press Enter Image: Advanced Showing 2 of 2 | | | | | |
| | | | | | 0 changed |
| > | | | | | • |
| > | | | | | - |
| | | | | | |
| ✓ Construction | ? | ✓ Reference Data | | | ? |
| Construction Change Order | ? | Reference Data Administrative Offices | | | ? |
| | | | | | ? |
| Change Order | | Administrative Offices | | | ? |
| Change Order Contract Administration | | Administrative Offices Contractor Evaluation Structure | | | ? |
| Change Order Contract Administration Contract Claims | • • • | Administrative Offices Contractor Evaluation Structure Design Evaluation & Structure | | | ? |
| Change Order Contract Administration Contract Claims Contract Permits | | Administrative Offices Contractor Evaluation Structure Design Evaluation & Structure Generic Equipment | | | ? • • |
| Contract Administration Contract Claims Contract Permits Contract Progress | | Administrative Offices Contractor Evaluation Structure Design Evaluation & Structure Generic Equipment Generic Personnel | | | ? |
| Change Order Contract Administration Contract Claims Contract Permits Contract Progress Contract Time | 4 4 4 4 4 4 | Administrative Offices Contractor Evaluation Structure Design Evaluation & Structure Generic Equipment Generic Personnel Material Categories | | | ? |



When multiple roles are assigned to a user, the user can only log on with one role at a time. If a role does not have access to a specific page or report, the user must change to a role that grants that access.

The Home menu lists all of the roles to which the user is currently assigned in blue and his active (current) role is displayed in black with a green check mark. The user does not need to log off to change his active role; he can do this at any time by clicking on another role in the Home menu.

1. Click the Home button action menu on any page to access the Home menu.

| Home Previous My Pages | • | _ | Actions | ? Help | U Log off |
|---------------------------------|---|--|---------|------------------|--------------|
| Switch Role | X | | | | U |
| CONSL_CONSTRMATRO | | System Administration Materials Construction MDOT Help Information st Level Support) | | | |
| CONSL_INSPR CONSL_OFFICETECH | | | | | ▼ ? |
| CONSL_PROJENGR | | | | | |
| CONTR_CONSTRMATRO | | | | | |

2. Select the role that you wish to use. The page will refresh, and you will be in your new role.

RECORDING PFC/CLOSEOUT INFORMATION IN CAS

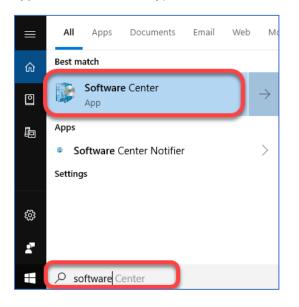


Phase Financial Closeout (PFC) was recently modernized and added to the Phase Initiator (PI) application. The construction tab of PFC, used by field office and region staff to record information regarding the final estimate, was moved to the CAS application. CAS is now the application that records final estimate data from the field.

Loading CAS from the Software Center

NOTE: If you already have CAS installed, skip this section and go to Logging into CAS.

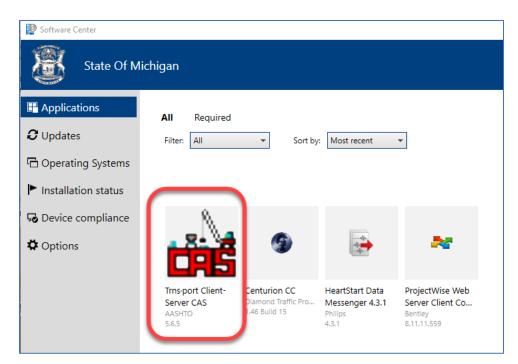
- 1. Click the Start button in the bottom left corner of your desktop.
- 2. Type Software in the "Type here to search" field and Select the Software Center option.



3. Type CAS in the search box on the top right of the screen.

| P Software Center | | – 🗆 X |
|-------------------|--------------|--------|
| State Of M | lichigan | |
| Happlications | All Required | CAS P |
| C Updates | Filter: All | %≣ ⊞ ⊞ |

4. Select CAS from the options presented.

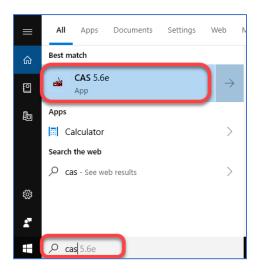


5. Click the Install button.

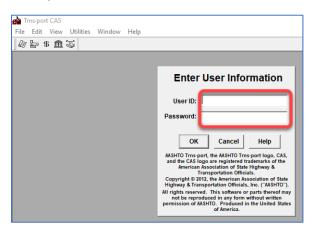
| P Software Center | |
|---------------------|--|
| State Of Michiga | n |
| Applications 3 App | lications > Application details |
| C Updates | Trns·port Client-Server CAS |
| Coperating Systems | Published by AASHTO |
| Installation status | |
| Device compliance | |
| Options | Transport Construction Administration System (CAS) |

Logging into CAS

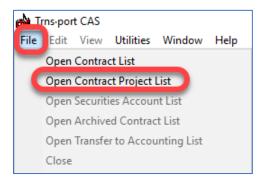
- 1. Click the Start button in the bottom left corner of your desktop.
- 2. Type CAS in the Type here to search field and Select the CAS 5.6e option.



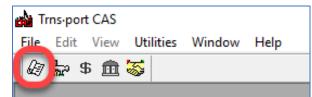
3. Enter your User ID and Password and Click OK.



4. Click the File option on the menu bar and Select Open Contract List from the dropdown.



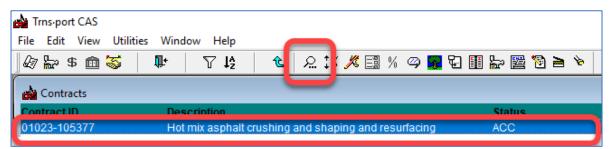
Click the **Rolled Paper** icon to display the contract list.



5. Click on the Filter icon and enter your search criteria to find the contract.

| Trns-port CAS | |
|----------------|--|
| File Edit View | Utilities Window Alp |
| 🖉 🖕 \$ 🏛 | 🍯 🗣 🔵 T 📙 🌜 A. 🕻 🗯 🖾 🥱 🖓 🖬 🔛 🖺 🍋 🔌 |
| Contracts | |
| Contract ID | 📸 Filter 🛛 🕹 |
| 01000-112768 | Where |
| 01000-112769 | Column: Operator: Value: |
| 01000-133066 | Contract ID Contains I05377 |
| 01000-200253 | |
| 01000-201218 | |
| 01000-205363 | OK <u>Cancel Advanced</u> Show All |
| 01001-108795 | |

6. Click on a contract to select it and Click on the Magnifying Glass in the toolbar.



7. Click the Page 7 tab to display the PFC information.

| 📸 Trnsport CAS |
|--|
| Tie Edit View Utilities Window Help |
| |
| ୁଡିଳି\$ ଲିଷ୍ଡି 📭 😮 |
| A Contract 01000-133066 |
| Page 1 Page 2 Page 3 Page 4 Page 5 Page 7 |
| Project Review Date: 00/00/00 Engineer Certification Expiration Date: 00/00/00 |
| Final Estimate Projected Date: 00/00/00 9 Month Letter Sent Date: 00/00/00 |
| 1 Year Letter Sent Date: 00/00/00 Final Amount Due: |
| Primary Reason For Delay: |
| Construction Comments: |
| |
| |
| |
| Contractor Payment Comments: |
| |
| |
| |
| 1 |

15

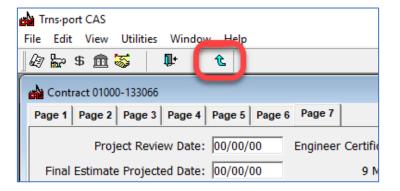
8. Click the Change button at the bottom of the scree to enter data.



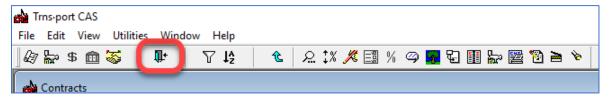
9. Click the OK button to save the data <u>OR</u> Click the Cancel button if you do not want to save your changes.



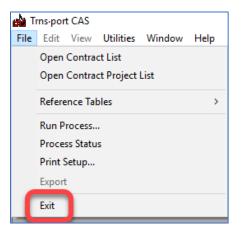
10. Click the Up-Pointing Arrow on the toolbar to return to the contract list.



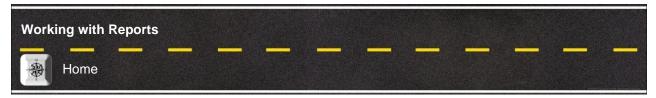
11. Click on the Closing Door with Arrow to close the contract list screen.



12. Click File in the toolbar and Select Exit. Working with Reports



WORKING WITH REPORTS



You can generate reports from any page in the system by clicking the Actions menu on the Menu Bar and then clicking Generate Report. Reports are available to you through the security settings of your active role and by agency customizations to the application. As a result, some reports might not be available to you.

Generating A Report

1. **Select Generate Report** from the Actions menu on the Menu Bar. The system takes you to the Generate Report component, which lists all the reports you can generate.

| C Dathbard AASHTOWare Projectim - Google Chrome d mdotao.state.mius/#/Dashbard | | | |
|---|--|--------|--------------|
| Home Previous My Pages | Action | s Help | U Log off |
| On this page: Announcements Materials Construction MDOT Help Information PROJECT MDOT Construction/Materials Read Only | Actions X Open Process History Tracked Issues | | |
| Announcements Q Type search criteria or press Enter Advanced Showing 2 of 2 | Cases Generate Report Global Attachments Global Links | | • ? |
| Announcement Q This collection of information is required by law and regulation 23 U.S.C. 140a and 23 CF Q The version of this application is 4.1 Revision 035. | My Settings My Outbox R Part 230. The OMB control number for this collection i | s 2' | 0 changed |

2. In the list of reports, Search for a report using a keyword in name of the report and **Click** the row for the **Report** you want to generate.

| Home Previous My Pages | Actions | () Help | U Log off |
|--|---------|------------|--------------|
| Generate Report | | | |
| ✓ Generate Report | | Execute | - 😯 |
| Settings Select Report | | | * * |
| Q review Advanced Showing 1 of 1 | | | 0 selected |
| Report Data | | | |
| Final Project Review Report (*) Contract | | | |

3. Select **Set Parameters** from the **Settings** menu on the component subheader. The system displays parameter options for the selected report. Select appropriate options within the parameters window.

| ttin s Set Parameters 💌 | 3 of 5 | 6 |
|-------------------------------------|--------|---|
| | | • |
| Run All | | |
| Runs across all contracts | | |
| | | |
| Region * | | |
| Enter All or a specific region name | | |
| ALL | | |
| TSC * | | |
| Enter All or a specific TSC. | | |
| ALL | | |

4. By default, reports are generated in PDF format. If you want your report generated in HTML format, select **Output Options** from the **Settings** menu on the component subheader and **Click** the option labeled **Generate as HTML**.

| Generate Report | | | | |
|---|----------------------------|---------|---|---|
| ✓ Generate Report - Final Project Review Report (*) | | Execute | - | ? |
| Setting Output Options 🔹 4 of 5 | | | + | * |
| Output Type | Report Layout Source | | | |
| Generate as PDF | O Base | | | |
| O Download PDF | Custom | | | |
| ○ Generate as HTML | O Test | | | |
| Generate Available Data Output | | | | |
| | | | | |
| | | | | |

5. Click the Execute button on the component header.

The system generates the report and displays it in a new browser window. Use your browser's print function to print the report if you need a printed copy.

(If you selected the option to generate the report in HTML format, the system displays a file Download window. Click the Open button, and the system displays the HTML report in a new browser window.)