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Introduction

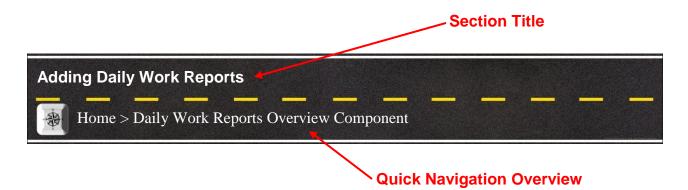
Welcome to AASHTOWare Project Construction & Materials, a fast, easy-to-use, web-based system for documenting construction progress, initiating contractor payment, and communicating with your agency's central office administration applications. Construction & Materials focuses on refining the work flow 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		9
	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, rightclick on the Menu Bar and select Menu Bar.
 - ii. The browser opens a Compatibility View Settings dialog window.

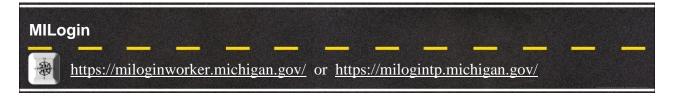
These steps only need to be performed once for each SOM computer or workstation that you use.

- 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.
 - 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 the **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

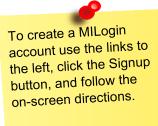


MILogin is the State of Michigan Identity, Credential and Access Management (MICAM) solution. The MILogin solution provides enhanced single sign-on capabilities in addition to meeting many other business requirements and security and compliance needs.

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: https://miloginworker.michigan.gov/

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

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

Mich	igan.gov				HELP	CONTACT US
MILog	in for Work	ers				
🚓 номе	🗄 REQUEST ACCESS	UPDATE PROFILE	🕞 LOGOUT			

- 4. Use the search box and enter AASHTOWare Project
- 5. Select AASHTOWare Project from the list of applications that appears.
- 6. 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@michigan.</u> <u>gov</u>

GENERAL NAVIGATION

Symbols and Buttons

Home

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	??
Search Field Symbol	Designates the field as a search field, records can be searched and filtered	Q
Clear Search Button	<i>Removes any search filters that may be active</i>	_
Log off Button	Logs you off and closes the browser window	С С



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 changed

Page Title

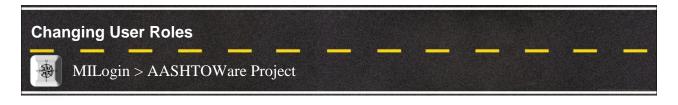
Every page has a page title under the Quick Links Section. This lets you know what screen you are on. If you are on the Home Dashboard the page title displays your active role.

Home Previous My Pages My	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: Comparison of the press of the pre			
		() 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.

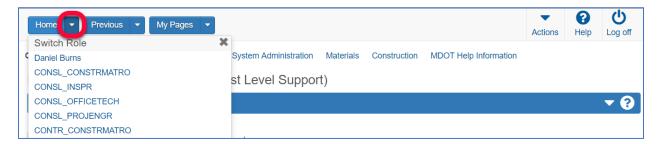
Home Previous My Pages			Actions	Pelp	U Log off
On this page: Announcements Reference Data Construction Mater	rials N	MDOT Help Information			
PROJECT MDOT Office Technician					
✓ Announcements					- ?
Q Type search criteria or press Enter Image: Content of the search criteria or press Enter					
					0 changed
>					-
>					•
Construction	?	✓ Reference Data		_	?
	?	✓ Reference Data Administrative Offices		_	?
Change Order				_	?
Change Order Contract Administration	Ŧ	Administrative Offices			-
Change Order Contract Administration Contract Claims Contract Permits		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		-	-
Change Order Contract Administration Contract Claims Contract Permits Contract Progress	4 4 4 4	Administrative Offices Contractor Evaluation Structure Design Evaluation & Structure Generic Equipment Generic Personnel			-
Contract Administration Contract Claims Contract Permits Contract Progress Contract Time	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.



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

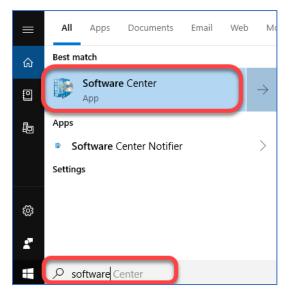


Phase Financial Closeout (PFC) was recently modernized and added to the Phase Initiator (PI) application. The construction tab of PFC, used by field office and region staff to record information regarding the final estimate, was moved to the CAS application. CAS is now the application that records final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

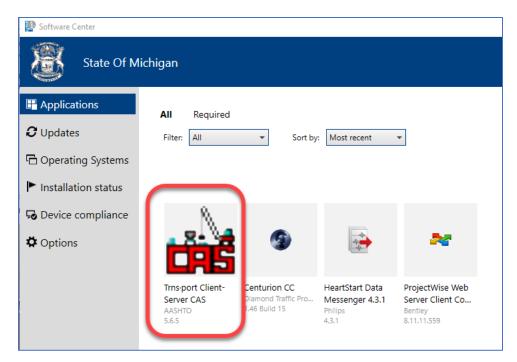
- 1. Click the Start button in the bottom left corner of your desktop.
- 2. Type Software in the "Type here to search" field and Select the Software Center option.



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

🕎 Software Center		-		\times
State Of N	lichigan			
Applications	All Required			٩
C Updates	Filter: All Sort by: Most recent		≈ :=	⊞

4. Select CAS from the options presented.



5. Click the Install button.

😰 Software Center	
State Of Michiga	n
Applications 3 Ap	plications > Application details
C Updates	M Trns port Client-Server CAS
G Operating Systems	Published by AASHTO
Installation status	Install
Device compliance	
Options	Transport Construction Administration System (CAS)

Logging into CAS

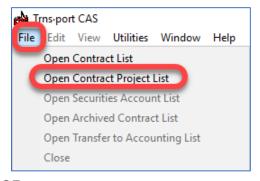
- 1. Click the Start button in the bottom left corner of your desktop.
- 2. Type CAS in the Type here to search field and Select the CAS 5.6e option.



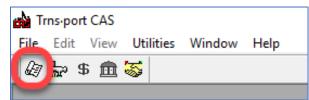
3. Enter your User ID and Password and Click OK.



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



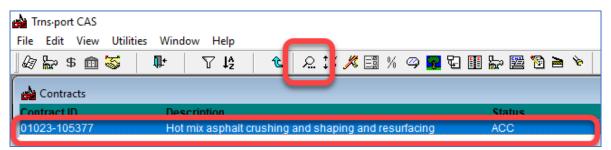
Click the Rolled Paper icon to display the contract list.



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

Trns-port CAS	
File Edit View	Utilities Windowskip
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Contracts	
Contract ID	📸 Filter 🛛 🕹
01000-112768	Where
01000-112769	Column: Operator: Value:
01000-133066	Contract ID Contains I05377
01000-200253	
01000-201218	OK Cancel Advanced Show All
01000-205363	<u>OK</u> <u>Cancel</u> <u>Advanced</u> <u>Show All</u>
01001-108795	

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



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

📸 Trns-port CAS
File Edit View Utilities Window Help
Ø ╞ \$ Ê 5 Ê 5
📥 Contract 01000-133066
Page 1 Page 2 Page 3 Page 4 Page 5 Page 6 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:

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



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



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

Trns-port CAS					
File Edit View Utilities Windo	W Help				
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📩 Contract 01000-133066					
Page 1 Page 2 Page 3 Page 4	Page 5 Page 6 Page 7				
Project Review Date: 00/00/00 Engineer Certific					
Final Estimate Projected Date:	: 00/00/00 9 N				

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

Trns-port CAS				
File Edit View Utilitie	es Wind	low Help		
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Contracts	-			

10. Click File in the toolbar and Select Exit.

Trns-port CAS							
File	Edit	View	Utilities	Window	Help		
	Open	Contra	ct List				
	Open	Contra	ct Project I	List			
	Refere	ence Tal	oles		>		
	Run P	rocess					
	Proce	ss Statu	s				
	Print Setup						
	Export	t					
	Exit						

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

11. 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.

Dashboard AASHTOWare Project(tm) - Google Chrome		- 5 ×
https://miloginworker.michigan.gov/aashtoware/#/Dashboard		0
Home Home		Actions Help Log off
On this page: Announcements Construction MDOT Help Information	Actions	A
on ans page. Announcements construction index nep mornation	Open Process History	
PROJECT MDOT Construction/Materials Read Only	Tracked Issues	
✓ Announcements	Cases	~ ?
	Generate Report	
Q Type search criteria or press Enter / Advanced Showing 2 of 2	Global Attachments	
Auvanceu showing 2 or 2	Global Links	0 shares d
	My Settings	0 changed
>	My Outbox	-
>		•

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



Generate Report (AASHTOWare Project(m) - Google Chrome https://miloginworker.michigan.gov/aashtoware/#/ReportGeneration/Overview		-	ı∎ × ⊙
Home Previous My Pages		tions Help	U Log off
Generate Report			
✓ Generate Report - Daily Work Report		Execute	- ?
Settings Select Report 1 of 5			<u>*</u> *
Q daily Advanced Showing 2 of 2		1	1 selected
Report	Data		
Daily Diary Report	DailyDiary		
Daily Work Report	DailyWorkReport		

The system adds a green check mark beside the report you selected and automatically takes you to the **Select Data** page.

13. If data is required, it will be noted on the **Select Data** page.

The system displays a Quick Find search box for locating the appropriate type of data for the report. Type criteria in the Quick Find search box, or click **Show first 10**. The system displays a list of all the records in the system that match your search criteria. Select the records you want to include in the report. If you want to select all records that match your search criteria, click the Select: **All** option.

If you are working on a large data set and you select to include All records in the report, keep in mind that such a large request for data requires a longer processing time.

https://miloginworker.michigan.gov/aa	Boogle Chrome ashtoware/#/ReportGeneration/Overview						- 0 >
Home	My Pages 🔻					Actions He	
Generate Report							
✓ Generate Report - Dail	ly Work Report					Execu	ite 🔻 ?
Settings Select Data 🔹	2 of 5						+ ()
Q Enter search criteria or hit e	enter	A					
Advanced Showing 10 of 90 Select: All None							2 selected
Advanced Showing 10 of 90	Description	DWR Date	Inspector	Sequence		DWR Status	2 selected
Advanced Showing 10 of 90 Select: All None			Inspector rotermans1038	Sequence	1	DWR Status Approved	2 selected
Advanced Showing 10 of 90 Select: All None Cont ID	Description	06/11/2018	-	Sequence			2 selected

14. If you need to select parameters for generating the report, select **Set Parameters** from the **Settings** menu on the component subheader or select the **Next Arrow**.

The system displays parameter options for the selected report. Select appropriate options in the parameters window.

Generate Report (AASHTOWare Projection) - Google Chrome Https://miloginworker.michigan.gov/asshtoware/#/ReportGeneration/Overview		-	e X
Home Previous My Pages My	Actions	? Help	U Log off
Generate Report			
✓ Generate Report - Daily Work Report		Execute	- ?
Settings Set Parameters 3 of 5			÷
Show Remarks * Display the subreport for Remarks.			
Show Contract Times Display the subreport for Contract Times			
8			
Show Contractor Personnel *			

- 15. 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**.
- *16.* 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.)