



User's Guide Supplement

For the Iowa Department of Transportation

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Iowa Department of Transportation Customized SiteXchange User's Guide Supplement

In an effort to fully interface AASHTO Trns•port® software with its existing systems and processes, the Iowa Department of Transportation requested the Subcontract Request and Approval Form in the generic Trns•port SiteXchange® software to be customized. Enhancements were completed in the Miscellaneous Data Screen, Subcontract Request and Approval Report, Subcontractors Sub-Header Screen, and Subcontractors Detail Screen.

There were no changes made to the Trns•port LAS® to SiteXchange interface.

These new screens and fields are used to specify that a contractor acknowledge all the comments before submitting the form; confirmation or denial of Division of Labor registration and phone number for each subcontractor; and the input of a dollar amount paid to DBE subcontractor or material supplier for each subcontract item.

Users will follow these steps to invoke this custom process:

At the DOT:

1. Use Trns•port LAS to create contract.csv and Vendor.dat export files.
2. Use **SubGen** to Create Contract files like this (from command line):

```
C:\SiteXchange\SubGen\> SubGen contract.csv
```

This will create one or more contract files (*.con).

3. Use **SubGen** to Create Reference file(s) like this (from command line):

```
C:\SiteXchange\SubGen\> SubGen /Encrypt Vendor.dat
```

This will create a Vendor.bin file.

4. The *.con and *.bin files are transferred to contractor.

At the Contractor's office:

1. Use **SubCon** to load a contract file. Add subcontractors and all related information.
2. Sign in the **Miscellaneous Data** folder after reading all the comments.
3. Click on yellow check mark button or select **Check Contract** from the **Tools** menu to confirm that no errors exit.
4. Select **Print** from the **File** menu to print the report.
5. Use SubCon to create a Contract file like this(from command line):
c:\sitexchange\subcon\>subcon <contract file name>
This will create the Subs.dat file.

Miscellaneous Data Screen

After the Subcontractors and, if necessary, items associated to the subcontractor have been added, then the contractor will sign in the Miscellaneous Data folder after reading all the comments. This assures that the contractor has acknowledged all the comments before submitting the form.

The text on the Miscellaneous folder screen has changed from the generic SiteXchange.

Verifying the Misc Data Screen

After reading the comments, the contractor will select **Yes** on the dropdown menu to acknowledge the customized text determined by IADOT is true and correct to the best of its knowledge.



Figure 1. MISC Screen

Subcontract Request and Approval Report

The Subcontract Request and Approval Report has been customized for the agency as follows:

1. A new totals section has been added to the header (front) of the report, including Number of subcontractors, Total Contract Amount, Total Subcontractor Amount Entered, and Total Subcontractor % of Contract Entered.
2. Added A: column and a total is calculated and displayed.
3. Added a percent field calculated as the percent of the total contract amount that the Subcontractor represents by adding all its Subcontract items.

Iowa Department of Transportation	
SUBCONTRACT REQUEST AND APPROVAL	
Contractor: IA Contracting Service	County: Madison
Contractor Identification Number: 12345	Contract ID No.: C12234
(Number used on employers quarterly Federal Tax return U.S. Treasury Dept. Form 941)	
Letting Date: 11/11/11	Bid Order:14

Number of subcontractors:	
11	
Total Contract Amount:	
500,000.00	
Total Subcontractor Amount Entered:	
350,000.00	
Total Subcontractor % of Contract Entered:	
30	

Figure 2. Sub Request Form Front Page Example

SUBCONTRACT REQUEST AND APPROVAL						
Contractor: IA Contracting Service Contractor Identification Number: 12345 (Number used on employers quarterly Federal Tax return U.S. Treasury Dept. Form 941) Letting Date: 11/11/11				County: Madison Contracts ID No.: C12234 Bid Order: 14		
<p>This is to request that the following subcontractor be approved to perform the work for the items listed below. It is clearly understood by both the prime contractor and the subcontractor that all terms of the prime contract shall apply. It is also clearly understood that the subcontractor is not a third-party beneficiary of the contract between the prime contractor and the DOT.</p> <p>When this subcontractor is being used to satisfy an established DBE goal, the actual amount to be paid to the DBE is indicated in Column A Col. The approval of the DOT is limited to the question of whether the subcontractor is a DBE and shall in no sense be construed as an endorsement of the DBE or an expression of opinion by the DOT on the subcontractor's ability to comply with the contract.</p>						
Subcontractor: Water Removal Systems Address: 1234 NW Testing Ave. Small Town, IA 12345				Subcontractor Number: 3456 (Federal Tax Return U.S. Treasury Dept. Form 941) Division of Labor Registration: Yes Telephone No.: 333-222-2345		
<p>The following conditions apply if this is a Federal Aid Contract:</p> <ol style="list-style-type: none"> 1. The prime contractor is responsible for compliance by the subcontractor with Required Contract Provisions for Federal Aid Contracts, Form FHWA-1273, dated as per contract, relative to projects financed under the Federal Highway Act relative to wages and payrolls, and all terms of the prime contract applicable to the work performed by the subcontractors. A copy of FHWA-1273 shall be attached to the subcontract. 2. The prime contractor is responsible for checking and submitting subcontractor's payrolls at the same time the prime contractor's payrolls are submitted when payment of predetermined wages is required. 3. I do hereby certify that in requesting approval to sublet a portion of this project we have taken affirmative action to seek out and consider disadvantaged business enterprises as potential subcontractors and/or material suppliers. 						
Line No.	Item Description	Quantity	Unit Price	A Col	\$ Amount	Part. Item
1.	Mobilization	1	250,000.00	100,000.00	250,000.00	Y
			Totals:	100,000.00	(a)250,000.00	
					Pct. Sublet (a/b)*100	
Article 1108.01 of the Standard Specifications requires the contractor to submit "Subcontract Request and Approval" to the Contracting Authority with the signed contract. Any additional subcontractor requests or changes after the contract has been signed should be submitted to the Project Engineer with the justification as required by the Iowa Code.						

Figure 3. Sub Request Form Detail Page Example

The report has been customized so the user can provide confirmation or denial of Division of Labor registration and a phone number for each subcontractor; provide contract language and conditions; display a dollar amount paid to DBE subcontractor or material supplier for each subcontract item (column A) as well as a total and summary information.

The report header page contains:

- general contract information,
- the number of subcontractors,
- the total contract amount,
- the total subcontractor amount entered,
- the total subcontractor % of contract entered.

Sub Request Form Detail Page contains:

- Contract language and conditions
 1. Subcontractor general information
 2. List of items associated to subcontractor by:
 - item,
 - quantity,
 - unit price,
- The actual dollars paid to Disadvantaged Business Enterprise (DBE) subcontractors or material suppliers for each item
 1. Indication if the item is a Partial Item
 2. Summary information consisting of subitem total amount for each subcontractor and the total contract amount (b)
 3. Percentage sublet per subcontractor $(a/b)*100$

This custom process will produce the report in portrait format.

Subcontractors Sub-Header Screen

Subcontractors Sub-Header Screen includes two new fields. The first is the subcontractor's phone number, which is prepopulated from the vendor file. The other field is the Division of Labor Registration, which is indicated with a Yes or No for each subcontractor.

Adding Subcontract Information

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.

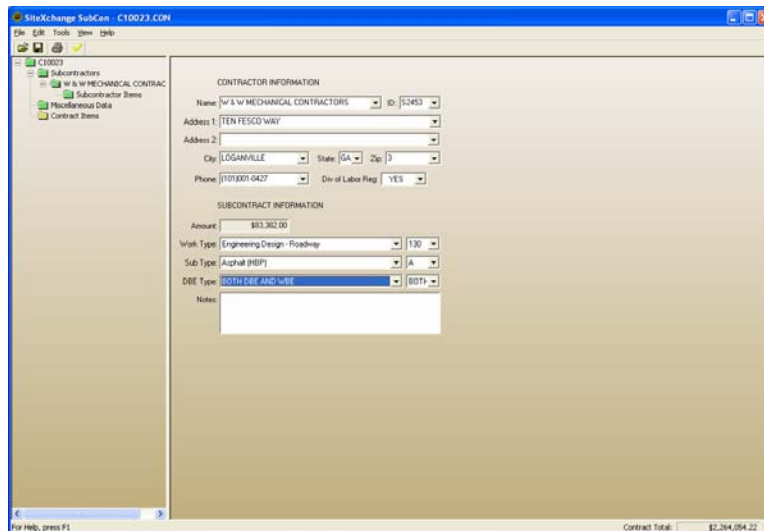
The screenshot shows the SiteXchange SubCon application window. On the left is a tree view with folders for 'Subcontractors', 'MECHANICAL CONTRACT', 'Subcontractor Items', 'Miscellaneous Data', and 'Contract Items'. The 'Subcontractors' folder is selected. The main area is divided into two sections. The 'CONTRACTOR INFORMATION' section has fields for Name (JW & W MECHANICAL CONTRACTORS), ID (12453), Address 1 (TEN PESCO WAY), Address 2, City (LOGANVILLE), State (GA), Zip (3), Phone (770) 601-0427, and Div of Labor Reg (YES). The 'SUBCONTRACT INFORMATION' section has fields for Amount (\$11,362.00), Work Type (Engineering Design - Roadway), Sub Type (Asphalt (HBP)), DBE Type (Both DBE and WBE), and a Notes text area. The status bar at the bottom shows 'Contract Total: \$2,264,094.22'.

Figure 4. New Subcontractor Folder in Tree View

If the subcontractor is already listed as a vendor in SiteXchange, enter the subcontractor's name or ID number or click the down arrow to display a list of registered vendors. 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, including the telephone number.

If the name of the new subcontractor is not in the list, type the name in the Name text box and press TAB to move to the next text box to fill in the remaining information.

Complete the subcontractor record by entering information into these remaining fields:

Division of Labor Registration	Confirmation or denial of Division of Labor registration for each subcontractor. Choices are Y or N.
Sub Type	This field contains a list of valid codes for subcontractor classifications. Certain sub types require that a subcontract amount be used instead of contract items to calculate the bid. When these sub types are chosen, you must also enter an amount in the Subcontract Amount field to create a complete record.
Type of Work	This field contains a list of valid codes for work classifications. The choices available depend on the selected subcontractor.

Notes

Miscellaneous comments may be added to the record in this field. These are not used in processing.

Select **Save** from the **File** menu to save the new subcontractor record.

Subcontractors Item Detail Window

The upper section of the window contains a scrollable list of all the items that can be subcontracted. A new column has been added labeled A Col. The column is populated based upon the input field A Col on the lower portion of the screen. The contractor can input the actual dollar amounts paid to DBE subcontractors or material suppliers for each item in the A Col field.

The screenshot shows the 'SiteXchange SubCen - C10023.COM' window. The upper section displays a scrollable list of items with columns: Item?, Line, Item, Quantity, Unit, Unit Price, Extension, A Col, and Description. The lower section provides a detailed view of a selected item (Line 0130) with fields for Vendor (W V MECHANICAL CONTRACTORS), Description (HBP (in C5) (Asph)), Quantity (2,138.000), Unit (TON), Unit Price (\$35.00000), A Col (\$100,000.00000), and Notes. The Contract Total is displayed as \$2,364,054.22.

Item?	Line	Item	Quantity	Unit	Unit Price	Extension	A Col	Description
<input checked="" type="checkbox"/>	0130	403-0130	2,138.000	TON	\$35.00000	\$74,830.00	\$100,000.00	HBP (in C5) (Asph)
<input type="checkbox"/>	0135	411-10255	3,294.000	GAL	\$0.31000	\$1,012.14	\$0.00000	End Asph (55)
<input type="checkbox"/>	0140	420-00101	40.000	SY	\$2.50000	\$100.00	\$0.00000	Geotextile (Ft Cont) (CL B)
<input type="checkbox"/>	0145	420-00110	603.000	SY	\$2.50000	\$1,507.50	\$0.00000	Geotextile (Drain) (CL A)
<input type="checkbox"/>	0150	420-00500	222,251.000	SY	\$0.60000	\$133,350.60	\$0.00000	Geotextile (Paving)
<input type="checkbox"/>	0155	506-00212	20.000	CY	\$80.00000	\$1,600.00	\$0.00000	Pipe (12 in)
<input type="checkbox"/>	0160	603-50018	36.000	LF	\$40.00000	\$1,440.00	\$0.00000	10 in Plastic Pipe
<input type="checkbox"/>	0165	604-00505	4.000	EACH	\$2,700.00000	\$10,800.00	\$0.00000	Inlet Ty D (5 Ft)
<input type="checkbox"/>	0170	604-19105	2.000	EACH	\$2,400.00000	\$4,800.00	\$0.00000	Inlet Ty H L5 (5 Ft)
<input type="checkbox"/>	0175	605-00040	217.000	LF	\$10.00000	\$2,170.00	\$0.00000	4 in PP Underdrain
<input type="checkbox"/>	0180	605-04000	215.000	LF	\$15.00000	\$3,225.00	\$0.00000	Subsurface Drain Outlet
<input type="checkbox"/>	0185	606-00301	10,730.000	LF	\$13.00000	\$139,490.00	\$0.00000	Grid Ty 3 (5-7)
<input type="checkbox"/>	0190	606-01320	5.000	EACH	\$300.00000	\$1,500.00	\$0.00000	End Anchor Ty 3B
<input type="checkbox"/>	0195	606-01350	26.000	EACH	\$495.00000	\$12,870.00	\$0.00000	End Anchor Ty 3C
<input type="checkbox"/>	0200	606-01305	3.000	EACH	\$1,000.00000	\$3,000.00	\$0.00000	End Anchor Ty 3J
<input type="checkbox"/>	0205	609-21011	8,075.000	LF	\$10.41000	\$84,080.75	\$0.00000	C and G Ty 21 M

Figure 5. Subcontractors Item Detail Window

When a new item is added to a subcontractor, the A Col field will default to zero. The A Col field will appear on the customized Subcontract Request and Approval Report and be used in calculations.

Adding Items to Subcontractor

To subcontract an item to a vendor, select the item from the list in the upper section of the Subcontractor Item window, and select either 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. Modify any values in the lower portion of the screen if necessary.

Fill out the A Col field based on the actual dollar amounts paid to DBE subcontractors or material supplier for the selected item. When saving the record, the A Col column will update with the input dollar amount.

