



# **User's Guide Supplement**

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**For the Iowa Department of Transportation**

**March 2008**

AMERICAN ASSOCIATION OF  
STATE HIGHWAY AND  
TRANSPORTATION OFFICIALS

**AASHTO**  
THE VOICE OF TRANSPORTATION



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# Contents

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**Iowa Department of Transportation Customized SiteXchange User’s Guide Supplement**  
.....**1**

Miscellaneous Data Screen.....2

    Verifying the Misc Data Screen.....2

Subcontract Request and Approval Report .....3

Subcontractors Sub-Header Screen .....5

    Adding Subcontract Information.....6

Subcontractors Item Detail Window .....7

    Adding Items to Subcontractor .....7



# Iowa Department of Transportation Customized SiteXchange User's Guide Supplement

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In an effort to fully interface AASHTO Trns•port<sup>®</sup> 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<sup>®</sup> 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<sup>®</sup> 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 exist.
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.

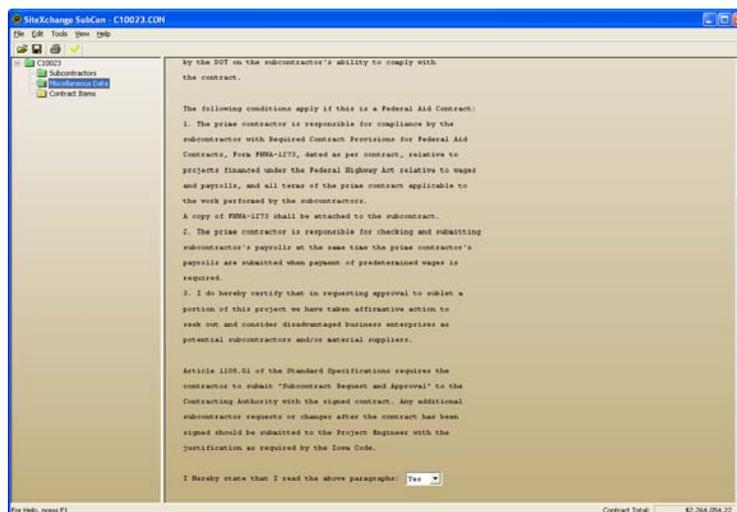


Figure 1. MISC Screen

# 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



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.

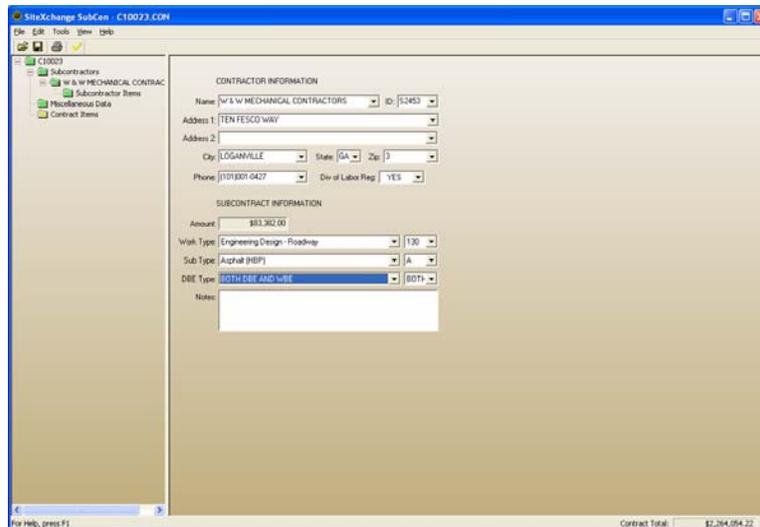
The screenshot shows the SiteXchange SubCon application window. On the left, a tree view displays a folder structure under 'C:\0023'. The main area is titled 'CONTRACTOR INFORMATION' and contains several fields: 'Name' (J & W MECHANICAL CONTRACTORS), 'ID' (12453), 'Address 1' (TEN FESCO WAY), 'Address 2', 'City' (LOGANVILLE), 'State' (GA), 'Zip' (3), 'Phone' (770) 809-0427, and 'Div of Labor Reg' (YES). Below this is the 'SUBCONTRACT INFORMATION' section with fields for 'Amount' (\$83,362.00), 'Work Type' (Engineering Design - Roadway), 'Sub Type' (Asphalt (HBP)), 'DRE Type' (BOTH EBE AND WBE), and a 'Notes' text area. The status bar at the bottom right 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:

- |                                       |  |
|---------------------------------------|--|
| <b>Division of Labor Registration</b> | Confirmation or denial of Division of Labor registration for each subcontractor. Choices are Y or N.   |
| <b>Sub Type</b>                       | 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. |
| <b>Type of Work</b>                   | 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.

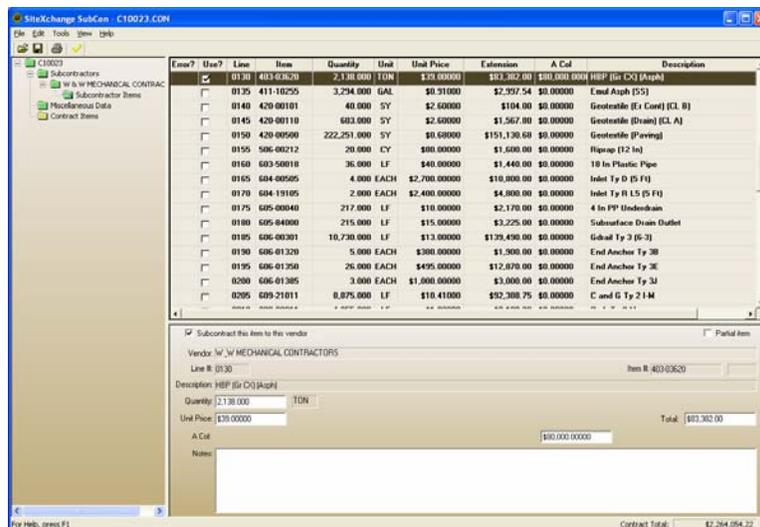


Figure 5. Subcontractors Item Detail Window

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.

