Creating and Saving the Time and Diary Report

So you're ready to create your first Time & Diary Report using the Time & Diary Plug-In. Here are the steps you need to take to access the plug-in, navigate through the window, create Time & Diary records, and print the Time & Diary Report.

Accessing the Time & Diary Plug-In

ODOT has developed a software plug-in which will work in conjunction with SiteManager and will assist our Residency offices in fulfilling the requirements of Section 108.07 of the Standard Specifications. The plug-in will gather the information that each Project Manager or Inspector has placed in the Diary and Daily Work Report. The plug-in will then allow the user to modify the information that will be included on the Time & Diary Report. The plug-in can be found under the attachment icon on the Contracts screen of SiteManager. Here are the steps you need to follow to access the Time & Diary Plug-in:

Step 1

Navigate to the Time & Diary Plugin in SiteManager (Accessories>Time & Diary Plugin).
Step 2
Double click the icon, the Time & Diary Logon window will appear. Type in your SiteManager userid in the User Name field and click the Logon button.

Step 3
If you have entered a valid SiteManager user id into the logon window, the Time & Diary Plug-In window will appear as follows.
Understanding The Time & Diary Plug-In Window

The following information will hopefully give you some insight into the information contained on the Time & Diary window as well as information on how the plug-in works with the data it retrieves from SiteManager. Each field or button in the screen capture shown below has been labeled with a letter designation. Refer to the following information for each field.

A. This field identifies the appropriate contract for the Time & Diary report. Click the arrow to the right of the field and a listing of all the contracts in SiteManager will appear. Select the appropriate contract.

B. This field identifies the current report number. Click the arrow to right of the field and a listing of all the previously saved or previously approved reports for the associated contract will appear. Select the appropriate report number. If you are creating a new report, refer to Item S below.

C. This field indicates the status of the selected report. Reports with a status of PENDING can be edited and re-saved. Reports with a status of APPROVED can no longer be edited or changed. New reports cannot be created until the status of a previous report has been changed to APPROVED and saved. To change the status of a report to APPROVED, click the arrow to the right of the field and select APPROVED. Click the save button to save the modification.

D. This field will indicate the userid of the person who last modified the report. The information shown in this field is generated by the system and cannot be edited by the user.

E. This field will indicate the last date the report was modified. The information shown in this field is generated by the system and cannot be edited by the user. The format for the date indicated is YYYY/MM/DD.
This field identifies the beginning date of the reporting period. The Time & Diary Plug-In will only generate monthly reports and will not generate semi-monthly reports. The issue date of the Notice To Proceed will be the beginning date of the first Time & Diary report. Since the contractor may begin work any time after the Notice To Proceed is issued and, given that some contracts contain a flexible start date provision, one or more reports may need to be generated prior to the first SiteManager Diary. The beginning date for all successive reports will be the first day of the associated month. The information shown in this field is generated by the system and cannot be edited by the user. The format for the date indicated is YYYY/MM/DD.

This field identifies the ending date of the reporting period and will always be the last day of the month. This will also be true on the final Time & Diary report eventhough the last SiteManager Diary was created prior to the end of the month. The information shown in this field is generated by the system and cannot be edited by the user. The format for the date indicated is YYYY/MM/DD.

This field identifies the Primary Project Number(Job Piece Number) for the selected contract. The information shown in this field is pulled from the Primary PCN field found on the Description Tab of the Contracts screen in SiteManager. The information shown in this field is generated by the system and cannot be edited by the user.

This field identifies the original contract amount for the selected contract. The information shown in this field is pulled from the Bid Amount field found on the Description Tab of the Contracts screen in SiteManager. The information shown in this field is generated by the system and cannot be edited by the user.

This field identifies the Federal/State project number. The information shown in this field is pulled from the Fed St/Pr Prj Nbr field found on the Description Tab of the Contracts screen in SiteManager. The information shown in this field is generated by the system and cannot be edited by the user.

This field identifies the prime contractor for the contract. The information shown in this field is pulled from the Prime Contractor field on the Prime Contractor Tab of the Contracts screen in SiteManager. The information shown in this field is generated by the system and cannot be edited by the user.

This field identifies the primary county for the contract. The information shown in this field is pulled from the Contract County field on the Location Tab of the Contracts screen in SiteManager. The information shown in this field is generated by the system and cannot be edited by the user.

This field identifies the original contract time for the selected contract. If the contract time for the selected contract is calendar days, the number shown is the original contract time. If the contract time is a fixed calendar day, the number shown is the difference in days between the date in which the Notice To Proceed was issued(pulled from the Notice To Proceed date on the Critical Date Tab of the Contracts screen) and the original fixed completion date(pulled from the Original Completion Date field on the Critical Date Tab of the Contracts screen). The information shown in this field is generated by the system and cannot be edited by the user.

This field identifies the effective date of the Notice To Proceed. This information shown in this field is pulled from the Notice To Proceed Effective Date field on the Key Dates screen in SiteManager. The information shown in this field is generated by the system and cannot be edited by the user. The format for the date indicated is YYYY/MM/DD.

This field identifies the date in which work began on the contract. The information shown in this field is pulled from the Work Began date field on the Key Dates screen in SiteManager. The information shown in this field is generated by the system and cannot be edited by the user. The format for the date indicated is YYYY/MM/DD.

This field identifies the time remaining from the last report. If the contract time for the selected contract is calendar days, the calendar days remaining from the previous report will be shown. If the contract time for the selected contract is a fixed completion date contract, the days remaining from the last report will be the difference in time between the beginning date of the report and the adjusted completion date(pulled from the Adjusted Completion Date field on the Critical Date Tab of the Contracts screen in SiteManager). The information shown in this field is generated by the system and cannot be edited by the user.

This field identifies the contract description. The information shown in this field is pulled from the Description Field on the Description Tab of the Contracts screen in SiteManager. The information shown in this field is generated by the system and cannot be edited by the user.

This button will refresh saved reports that are in the PENDING status. This button will work only after selecting the appropriate contract id and the appropriate report number. Clicking this button will retrieve additional information for the period which was not saved with the previous report and check to see if any change orders where approved.
during the period which extended the contract time. If an approved time extension change order for a fixed completion date contract is found during the period, the Time Remaining CD (see II below) field will be adjusted to account for the adjusted completion date. If an approved time extension change order for a calendar day contract is found during the period, the Days Added By Change Order (see GG below) field will be populated with the calendar days included on the change order.

S  This button will create a new report for the selected contract. The new button will work only after the status of the previous report has been changed to APPROVED and saved.

T  This button will save any work you have completed to the database. If you close the Time & Diary Plug-In window without saving your work first, the system will respond by asking if you want to save your work.

U  This button will reset everything in the current Time & Diary record. When this button is clicked the system goes back to the original records found on the Diaries and DWR's and retrieves that information into the current report overwriting any changes you made previously. If you have chosen the click the Reset button, click the Save button to write the information to the database.

V  This button will print a hard copy of the Time & Diary record. When this button is clicked it will print the Time & Diary that is in the current view. This button does not save it to hard disk so if a copy is needed to e-mail you will still have to run the TIMEDIAR process in SiteManager.

W  This button will close the Time & Diary Plug-In. If the information was changed during the session, the system will ask you if you want to save the information to the database.

X  This column identifies all of the Diaries that were retrieved into the Time & Diary Plug-In. If a date is missing from the list, a Diary was not created for that particular day. The information shown in this field is generated by the system and cannot be edited by the user.

Y  This column identifies charge status for each Diary retrieved into the Time & Diary Plug-In. Every row in this column should indicate a charge day. If a row would indicate a zero, that means that the Project Manager selected "No Charge" on the Charge Tab of the Diary window. The information shown in this field is generated by the system and cannot be edited by the user.

Z  This column allows the user to enter weather related days which are lost on the contract. Refer to Construction Control Directive No. 990512 for additional information on how to enter information into this column.

AA This column allows the user to enter days which are lost due to various other factors occurring on the contract. Refer to Construction Control Directive No. 990512 for additional information on how to enter information into this column.

BB This column identifies the type of day identified by the Project Manager. The information in this column is pulled from the Type Of Day category found on the Diary window in SiteManager. The information shown in this field is generated by the system and cannot be edited by the user.

CC This column identifies the high temperature recorded on the DWR authorized on each Diary. If more than one DWR is authorized on a particular Diary, the information shown is the average of all the high temperatures from each authorized DWR. The information shown in this field is generated by the system and cannot be edited by the user.

DD This column identifies the low temperature recorded on the DWR authorized on each Diary. If more than one DWR is authorized on a particular Diary, the information shown is the average of all the low temperatures from each authorized DWR. The information shown in this field is generated by the system and cannot be edited by the user.

EE This column identifies the precipitation that was recorded by the Project Manager. This information in this column is pulled from the Site Conditions category found on the Diary window in SiteManager. The information shown in this field is generated by the system and cannot be edited by the user.

FF This column allows the user to edit the information retrieved from the Diary. The information is pulled from the General Remarks category on the Diary in SiteManager. Although the remarks can be edit in this field, the information on the Diary remains unaltered.
GG This field identifies the total number of days charged to the contract for the reporting period. Refer to Construction Control Directive No. 990512 for additional information on how this field is calculated. The information shown in this field is generated by the system and cannot be edited by the user.

HH This field identifies the total number of days lost due to weather conditions for the reporting period. Refer to Construction Control Directive No. 990512 for additional information on how this field is calculated. The information shown in this field is generated by the system and cannot be edited by the user.

II This field identifies the total number of days lost due to other conditions on the contract for the reporting period. Refer to Construction Control Directive No. 990512 for additional information on how this field is calculated. The information shown in this field is generated by the system and cannot be edited by the user.

JJ This field identifies the total number of normal adverse weather days allowed for the reporting period. Refer to Construction Control Directive No. 990512 for additional information on how this field is calculated. The information shown in this field is generated by the system and cannot be edited by the user.

KK This field identifies the total number of days added by change order during the reporting period. The days added by change order will not appear in this field until the change order has been approved by the final approval level. Refer to Construction Control Directive No. 990512 for additional information on how this field is calculated. The information shown in this field is generated by the system and cannot be edited by the user.

LL This field identifies the total number of days that the contract time will be extended due to weather related conditions. The number shown in this field is the number that will be input into the Contract Time Adjustment window in SiteManager. Refer to Construction Control Directive No. 990512 for additional information on how this field is calculated. The information shown in this field is generated by the system and cannot be edited by the user.

MM This field identifies the total number of days remaining on the contract. Refer to Construction Control Directive No. 990512 for additional information on how this field is calculated. The information shown in this field is generated by the system and cannot be edited by the user.

NN This field identifies the number of days that have elapsed since work began on the contract. Refer to Construction Control Directive No. 990512 for additional information on how this field is calculated. The information shown in this field is generated by the system and cannot be edited by the user.

OO This field identifies the resulting revised contract time after all of the previous time extensions have been considered. Refer to Construction Control Directive No. 990512 for additional information on how this field is calculated. The information shown in this field is generated by the system and cannot be edited by the user.
Creating The Time & Diary Record

1. Select the specific Contract ID from the drop-down pick list.

2. After you have selected the Contract ID click the "New" button. It will ask

   Do you want to generate a new report number?

   Click "Yes".

3. The report then generates the new Time & Diary Report you will need to make sure time was given back according to specifications and click "Save". Notice the "Status" of the report is "Pending".

4. When you are satisfied with the time adjustments you need to change the Status to "Approved" and Save the report again to accept the changes.
Creating The Last Time & Diary Record

The Time & Diary Plug-In keys off the Completion Date Key Date in SiteManager. The last Time & Diary record must be created and approved prior to the placement of the Completion Date in the Key Dates window. After the Completion Date is entered in the Key Dates window of SiteManager, the Time & Diary Plug-In will no longer allow access to the Time & Diary records for that contract.

Things To Consider When Reviewing The Time & Diary Records

1. The Time & Diary Plug-In pulls information from the Diaries which are created by the Project Manager. If information is missing from the fields in the Time & Diary Plug-In, the Project Manager did not supply the information in the Diary or DWR.

2. Be sure and check that a Diary has been created for each day within the period. A missing Diary will produce erroneous calculations for the remaining time.

3. Each time an existing report is retrieved, you should click the save button before leaving the plug-in. The plug-in performs retrievals in the background that will be lost if you exit the plug-in without saving.

Saving The Time & Diary Report

A Time & Diary record can be saved at any point in the process to the database. The Time & Diary records are saved by generating the Time & Diary Report from within SiteManager. The Time & Diary Report is a customized report that can be found on either the Contract Administration Process List, the Daily Work Reports Process List or the Contractor Payment Process List. Here are the steps to generate the report:

Step 1  Navigate to the appropriate Process List screen. Highlight the Time & Diary Report process and click the blue running man on the toolbar. The Confirm Process Submission window will appear.
Step 2  Enter the report number you wish to print and click the Subset button. The Select Subset window will appear.

Step 3  Select the appropriate contract from the selection list and click the OK button. The Confirm Process Submission window will reappear.
Step 4  Click the Submit button. A confirmation window will appear indicating that the process was submitted.

Step 5  Click OK on the confirmation window to acknowledge the information.

Step 6  The process is now running. When the process is finished, you will receive a message from the system that the process has completed. Click the OK button to acknowledge the information.
Step 7

Open the Process Status window by selecting Services on the Menu Bar and then select Process Status. The Process Status window will appear.

<table>
<thead>
<tr>
<th>Process ID</th>
<th>Process Type</th>
<th>Process Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSUBLLOAD</td>
<td>SM-Standard</td>
<td>SiteXchange to SiteManager: SubContract Load</td>
</tr>
<tr>
<td>BVENLOAD</td>
<td>SM-Standard</td>
<td>SiteManager to SiteXchange: Vendor Load</td>
</tr>
<tr>
<td>BEXLOAD</td>
<td>SM-Standard</td>
<td>SiteManager to SiteXchange: Contract Load</td>
</tr>
<tr>
<td>MAIITM</td>
<td>Custom</td>
<td>Major Item Report</td>
</tr>
<tr>
<td>ESTUPDT</td>
<td>Custom</td>
<td>Update Estimate Log</td>
</tr>
<tr>
<td>GRAYBOOK</td>
<td>Custom</td>
<td>Graybook: Data Extract</td>
</tr>
<tr>
<td>AWARDS</td>
<td>Custom</td>
<td>Add Newly Awarded Projects to the Graybook Table</td>
</tr>
<tr>
<td>TIMEDIAR</td>
<td>Custom</td>
<td>Time &amp; Diary Report</td>
</tr>
<tr>
<td>ACTIVLOG</td>
<td>Custom</td>
<td>Contract Activation Log</td>
</tr>
<tr>
<td>WRKORDR</td>
<td>Custom</td>
<td>Work Order Data Extract</td>
</tr>
<tr>
<td>GBARCHIV</td>
<td>Custom</td>
<td>Archive Graybook and Estimate_log Records</td>
</tr>
<tr>
<td>VENDLIST</td>
<td>Custom</td>
<td>Workman’s Comp &amp; General Liability Listing For Vendors</td>
</tr>
</tbody>
</table>
Step 8  Double click the completed process on the Process Status window. The Process Output window will appear.

Step 9  Double click the Output.html file. The web browser on your computer will launch and display the completed report.
Here is how the completed Time & Diary Report will look in your web browser. You can now save the electronic file to a file name and attach it to an email to the contractor. If you intend to print the report from this view, refer to Policy & Procedure 706.0-Process List for the appropriate printing mode.