

# Automated Construction Management User's Group (ACMUG) Agenda/Minutes

Thursday, May 9, 2024

9 a.m. – 11 a.m.

Teams Meeting

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Or call in (audio only) 608-571-2209

Conference ID: 632 874 715#

**Facilitator/Note taker: Lori DeBaere (NE Region)**

**Attendees (highlighted) :** David Castleberg (BPD), Adam Bleskacek (BPD), Annette Czerneski (BPD), Rebecca Olsen (NC), Lisa Koca (NC), Laura DeBaere (NE), Denise Foster (NW), Brandi Graham (NW), Adrienne Protokowica (NW), Karen Roberts (SE), Bridget Gifford (SW), Josephine Dagley (SW), Sharayah Streich (SW), Vanessa Chapman (SW), Kristie Robinson (BITS), Tyler Rongstad (BPD), Stacy Hagenbucher (NC), Chad Hayes (BPD), Drew Kottke (BPD), Nicolas Perna (FHWA), Mike Rud (SW), Kristin VanHout (NE), Carolyn Lavake (NC), Matthew Smith (SER), Mari Smith, Amy Taetsch, Kieu Vu, Santiago Rinaldi, Michelle Saari, Anthony Reddy, Patrick Tubbs (SWR), Kurt Walker (FHWA), Stacy Lehman, Trisha Ganshert, Allison Martinson

**Introduction: NER**

**Acceptance of 2/8/2024 meeting minutes:**



20240208-acm-mtgm  
inutes.pdf

*Accepted*

## Action Items:

### ACM Distribution Lists-

Southwest Region has a new Contracts Specialist, Patrick Tubbs.

## Agenda Items:

**Item #1**



How to download a copy of the historical change order report and import the report into Onbase for the Bureau of Fiscal Management – 30-45 minutes

David Castleberg and Annette Czerneski

<https://awpkb.dot.wi.gov/Content/constr/LETContract/ContractProgress/DistrExeChgOrders.htm>

	<p><i>Santi Rinaldi reported to Annette and David that change orders were missing in OnBase. Regions were surveyed about change order processing and uploading to OnBase. It was found that some regions have not been uploading the approved historical change order reports into OnBase, and some were not aware they were required to do it. Some regions do upload to OnBase.</i></p> <p><i>Mari Smith and Kieu Vu explained that it is important that this documentation is in OnBase for financial audits and evidence of fiscal changes to contracts. It is a financial library of financial contract information that's in PeopleSoft. It is important for funding sources and proof of expenditures. It makes the record of funding changes available to those that do not work with Box or AWP.</i></p> <p><i>Change orders are saved under the controlling project id, but we need to enter ids for all projects associated with the contract, so it is searchable by all project ids. This can be done, by entering all the ids in multiple project id lines, so we only upload it once.</i></p> <p><i>Southeast region contracts specialist does not currently upload to OnBase.</i></p> <p><i>Some Fiips coordinators get email notifications for change orders, some don't. They have ability to search OnBase for change order reports.</i></p> <p><i>OnBase demonstration of what screen looks like and how to hover over the project id to add additional project ids, and that you can drop and drag file to save it in OnBase.</i></p> <p><i>Discussion continues about contracts specialist role in the Southeast region.</i></p> <p><i>Financial guidance is that change orders be saved in OnBase under all project ID's for searchability reasons. Requests for access to OnBase should be sent to Kieu Vu. OnBase is web-based application.</i></p> <p><i>Annette will work with Krissy and Lori to update instruction documentation and verifying OnBase instructions are up to date.</i></p>
<p><b>Item #2</b></p>	<p>AWP 5.01.030 upgrade April 25-26 Annette Czerneski and David Castleberg</p> <ul style="list-style-type: none"> <li>• Payment Estimates   Item Adjustments tab - Project staff can create temporary OR permanent user-generated quantity base item adjustments. The AWPKB will be updated to reflect this change.</li> </ul> <p><i>Payment estimates now has item adjustments. They can create, be created temporarily or permanently by the project staff or project engineer when creating estimates.</i></p> <p><i>Documents need to be updated to reflect this information.</i></p> <ul style="list-style-type: none"> <li>• Daily Work Reports (DWRs)   Contractors On Site tab - Project staff will need to uncheck the Payroll Not Required checkbox to enter start / end time OR hours worked for the prime contractor.</li> </ul> <p><i>Payroll check box will go away and it will look the way it used to look. David and Annette will continue work on this.</i></p> <ul style="list-style-type: none"> <li>• Global reports – Daily Diary Report, DWR Report</li> </ul> <p><i>Issues with some reports, finals reports, not working for large contracts. Infotech has been notified, global problem. Working to resolve.</i></p> <ul style="list-style-type: none"> <li>• Payment estimate system event issues – Notice to Proceed Date and Time Charges Start Date missing system events</li> </ul> <p><i>If the project engineer does not have notice to proceed date or the time charges start date are missing when he creates a payment estimate, the system event emails are not being sent. Working on patch or hotfix to correct. Working with Infotech.</i></p> <ul style="list-style-type: none"> <li>• Active Reports 17 effect on Adobe Acrobat pdf files</li> </ul>

	<p><i>PDFs generated in AWP have been changed to a different Adobe format or mode. Currently creating reports with extra metadata and labeling as active report 17, which is almost twice as big of a file as the old format. Working on a fix to put PDF's back to regular format. One workaround is that you go into the Adobe properties and remove the title under the metadata description and hit ok. This will remove the active report 17 title. You can take the PDF and print it on the Adobe PDF printer. What that does is when you go back to the Adobe PDF printed file, it changes that compatibility format back to just a standard PDF. This allows editing of the PDF.</i></p>
<b>Item #3</b>	<p>Subcontractor entry on new construction contracts,  <a href="https://awpkb.dot.wi.gov/Content/constr/LETContract/ContractSetup/Subs.htm">https://awpkb.dot.wi.gov/Content/constr/LETContract/ContractSetup/Subs.htm</a>  Annette Czerneski</p> <ul style="list-style-type: none"> <li>• Adding subs</li> </ul> <p><i>Must enter all Tier 1 Subs and all DBE Subs. Must choose type and if supplier or trucking company. Project leaders are having trouble entering sub-contractors and their items. They must enter all tier 1 subs and DBE subs. They should be entering the subs and their contracted amounts, trucking or suppliers. Lower tier DBE's are entered by the Compliance Specialist. They should follow instructions from AWPKB to complete these entries. Also need to split out mobilization by contractors. Need to further discuss with Annette, David, and Krissy to advise in future. Need to decide how to post fees for product and fees for product prep or application.</i></p> <ul style="list-style-type: none"> <li>• When is a sub a supplier</li> <li>• Adding items</li> </ul>
<b>Item #4</b>	<p>How to obtain a list of Active and Pending contracts per county  Adam Bleskacek</p> <ul style="list-style-type: none"> <li>• SWR request and using the Finals Tracking Report (filtered) for this information.</li> <li>• Staff can also filter on the Contract Admin overview component.</li> </ul> <p><i>Adam is wondering if other regions need or want the ability to separate and track by county, status of projects. Is there a way to generate this report in AWP. Nothing in AWP at this time, but we can use the construction finals tracking report to filter information. They can be filtered by county. Projects will go on this report as soon as they are active in AWP.</i></p>
<b>Item #5</b>	<p>E-Ticketing – HaulHub updates  David Castleberg</p> <p><i>Training for HaulHub is available. Working on getting agency portal up and running so contracts can be viewed. Will be available for laptop, phones and tablets. Working on reconfiguring so 1 contract can have multiple projects associated with it. Demonstration of what the staff will view, and the tickets under the contract. Projects using this summer to test. It can accept tickets from any vendor, any work type. Going live in afternoon, to directly import from contracts active in AWP. Training for HaulHub May 14 11AM, and June 4 9:30AM. Invitation will be forwarded to Contracts Specialists, so it can be forwarded to other staff inquiring about program. Form will be available to contractors that may need an exemption from e-Ticketing.</i></p>
<b>Item #6</b>	<p>Trimble Mobile Measure Service Testing  David Castleberg and Adam Bleskacek</p> <p><i>Adam has been working with Shawn Meyer to get Mobile Inspector set up. It is a Windows device, so cannot access through an app, must use a browser. Will need to Install Mobile Inspector. Trimble is separate from Mobile Inspector. Link Infotech Mobile Inspector to Trimble measure service. Equipment will need to be shared as high price devices. Will be on the PE/PM to make</i></p>

	<p>sure information is accurate. They will enter stations in the field using GPS, and it will measure automatically, and enter to AWP.</p>
<p><b>Item #7</b></p>	<p>Extended punch list questions          Lisa Koca  <i>Wondering about punch list extensions and how it impacts semi-finals. WPDES or 70% growth not on punch list previously. Most common reasons punch list extended is plant establishment or open permits. If we can help people, try to follow the guidance and wait to enter the all contract work complete date until they've got all of these things checked that's going to help our data. Plant establishment and permit termination should be on the punch list. The punch list complete date should not be entered until they are completed or terminated.</i></p>
<p><b>Item #8</b></p>	<p>New Finals Process Questions, <a href="https://wisconsin.gov/rdwy/admin/finals.pdf">https://wisconsin.gov/rdwy/admin/finals.pdf</a>          Krissy VanHout</p> <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="margin-right: 20px;">               SF Email (2).docx         </div> <div style="text-align: center;"> <p style="color: red; font-weight: bold; font-size: 1.2em;">FINAL QUANTITIES FOR REVIEW</p> <p style="color: red; font-weight: bold; font-size: 0.8em;">EXCEPTIONS:              Quantities for items associated with a Plant Establishment Period              and/or items requiring additional work associated with WPDES              Permit Termination will be adjusted on the Final Estimate.</p> </div> </div> <p><i>New stamp to use on the semi-finals. Allows semi to be sent when there is still plant establishment and/or WPDES that is open. It is so that quantities can be verified, so when the permit is closed or plant establishment ends, it is easier to move on the final. We could pay seed or water if needed on the final. Stamp can be used on all semi-finals. Items will not be marked as complete so this should not give any errors for the semi-final. New examples for emails to be sent with the semi to include all situations. It covers positive, negative or zero semi-final. Also has wording for WPDES permit and plant establishment. This also includes quantity dispute instructions. If quantitative adjustments affecting the subcontractor will be made on the final estimate, then that form could be turned in after the final payments are made, and then we'll follow up with the final acceptance and Completion Cert after we received that. This helps to standardize what we do for all regions. DT2075, finals checklist lists that As Built, DQI and Contractor Evaluations are complete when records are submitted. Seems to be different instructions between AWPKB and the Finals Process for Let Project Closeout.</i></p> <p><i>Bridgette Gifford offered instructions to use email quick steps or phrases to save time.</i></p> <div style="margin-top: 10px;">               DOTEMAILPhrases.pdf         </div>
	<p><i>David Castleberg presented new program that creates dashboard info for project status. It tracks payments to give management a quick shot of the projects. Look of first draft. Most regions currently use a cost to complete to track at this time.</i></p> <p><i>Training set up for May 15<sup>th</sup> 1:30-3 for AASHTOWare Project.</i></p>

	<p><i>David asked about view of Region Remarks Screen, and if we should alter the display. Agreed to move Reason Remarks to one side, and Late Reason Codes to the opposite side. David will work with Anthony and send around for comments.</i></p>
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<p><b>NEXT MEETING: August 8, 2024, NW to Host</b></p>
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