Engineer’s Estimating, Bidding, Award, and Construction System (EEBACS)

EEBACS 1.0
User Guide
Preface
This Guide is intended for Contractor users granted access to the Federal Lands Highway’s (FLH) Engineer Estimating, Bidding, Award and Construction System (EEBACS).

The program was developed through a cooperative effort of the men and women of Central Federal Lands, Eastern Federal Lands, and Western Federal Lands. Technical development of the program was accomplished by Symplicity Corporation of Arlington, Virginia.

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Structure
This document is an abridged version of a more extensive user’s guide. Chapter 1 System Overview contains general information. Chapter 4 Construction Module is for users preparing documents while building and administering construction projects. Appendices contain information that may be used in more than one chapter or program or supplemental information to assist EEBACS users.
# Chapter 1 - System Overview

## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Introduction</td>
<td>1-2</td>
</tr>
<tr>
<td>1.2 User Accounts</td>
<td>1-3</td>
</tr>
<tr>
<td>1.2.1 Required Information for User Account Requests</td>
<td>1-3</td>
</tr>
<tr>
<td>1.2.1.1 New User Account Requests</td>
<td>1-3</td>
</tr>
<tr>
<td>1.3 Accessing the System</td>
<td>1-4</td>
</tr>
<tr>
<td>1.3.1 Access through the World Wide Web (www)</td>
<td>1-4</td>
</tr>
<tr>
<td>1.3.2 Access off-line</td>
<td>1-4</td>
</tr>
<tr>
<td>1.3.3 How to Login</td>
<td>1-4</td>
</tr>
<tr>
<td>1.3.3.1 Login with Username and Password</td>
<td>1-4</td>
</tr>
<tr>
<td>1.3.3.1.1 Forgot Password</td>
<td>1-6</td>
</tr>
<tr>
<td>1.3.4 How to Logout</td>
<td>1-7</td>
</tr>
<tr>
<td>1.4 Home Page</td>
<td>1-9</td>
</tr>
<tr>
<td>1.5 Navigation</td>
<td>1-10</td>
</tr>
<tr>
<td>1.6 Projects (All) Directory</td>
<td>1-11</td>
</tr>
<tr>
<td>1.6.1 Project (All)</td>
<td>1-11</td>
</tr>
<tr>
<td>1.7 &lt;Reserved&gt;</td>
<td>1-12</td>
</tr>
<tr>
<td>1.8 &lt;Reserved&gt;</td>
<td>1-12</td>
</tr>
<tr>
<td>1.9 &lt;Reserved&gt;</td>
<td>1-12</td>
</tr>
<tr>
<td>1.10 My Account</td>
<td>1-13</td>
</tr>
<tr>
<td>1.10.1 Changing a Password</td>
<td>1-13</td>
</tr>
<tr>
<td>1.10.2 Setting up a Security Question</td>
<td>1-14</td>
</tr>
<tr>
<td>1.11 Terms, Icons, and Abbreviations</td>
<td>1-15</td>
</tr>
<tr>
<td>1.11.1 Term and Icon Definitions</td>
<td>1-15</td>
</tr>
<tr>
<td>1.11.2 Abbreviations</td>
<td>1-21</td>
</tr>
<tr>
<td>1.12 Requesting Assistance</td>
<td>1-27</td>
</tr>
</tbody>
</table>
1.1 Introduction

The Engineer Estimating, Bidding, Award and Construction System (EEBACS) is an integrated system that provides for estimation, solicitation/award, and contract administration of FLH’s construction projects. EEBACS is a Web-based system that is maintainable and scalable. Portions of the Construction module will also be offered in an off-line version – Not available, under development. EEBACS consists of a series of components that tracks costs from a project’s inception through final acceptance.

The Construction module tracks information as the project progresses through construction. It provides for the development, approval, and tracking of payments for contract items. The Construction module also allow for tracking and management of other contract administration information including contract modifications, equipment, personnel, subcontractors, and contract status. In the Construction phase EEBACS provides the capability to:

- Create, track and approve Inspector Daily Reports (IDR);
- Create, track and approve Contractor Daily Reports (CDR);
- Create and track the Project Engineer’s Daily Dairy;
- Track onsite personnel and equipment;
- Track subcontractors and associated information;
- Create and track Contract Modifications;
- Document and track contract administration and status;
- Create, track and approve payments to the contractor; and
- Generate detailed reports of how the project was constructed, including cost, equipment, and personnel.

Each module allows for the creation of various reports and documents as well as the system capability for overall project and system level reports and tracking.

EEBACS is not an electronic bidding or payment system.
1.2 User Accounts

1.2.1 Required Information for User Account Requests

For all user account requests, download the appropriate form, EEBACS-001, EEBAC-002, and/or EEBACS-004 and fill out requested information. Forms can be downloaded from http://flh.fhwa.dot.gov/resources/pse/estimate/accounts.htm.

- **EEBACS-001-AE-Staff-Construction-Contractors-Request-Form.** For AE Staff and Construction Contractors user account requests, including: adding new, modifying, disabling, or deleting user accounts.

- **EEBACS-002-Government-InHouse-Contractors-Request-Form.** For Government staff and In-house Contractors (i.e. users with @dot.gov email addresses), including: adding new, modifying, disabling, or deleting user accounts.

- **EEBACS-004 User Special Rights request.** For requesting special, additional rights. This form will rarely be used. In most cases, rights granted via EEBACS-001 and EEBACS-002, along with any needed Project Roles, will be sufficient for most users. Special System Rights/Special Project Roles will only be considered for Government or In-House contract users (users with @dot.gov email addresses).

User accounts are based on the business e-mail address given. Provide a business e-mail address that is unique to the individual requesting the EEBACS account.

Submit the form to your supervisor, Project Engineer, or COTR as directed on the form for the required approvals. Requests will then be forwarded to the Local Division’s IT Service Desk.

To modify, disable, or delete a user account submit the appropriate user account form (EEBACS-001, EEBAC-002, and/or EEBACS-004). This same procedure should also be followed if your e-mail address changes.

1.2.1.1 New User Account Requests

Once the appropriate user request form has been approved, processed, and the new user account has been created, a randomly generated password will be sent to the e-mail account provided. The emailed password will come from noreply@symplicity.com.

Login to the system, see Section 1.3.

**Upon successful login, go to “My Account” to change the password and set up a security question.** See Section 1.10.1 for Password requirements, including expiration of passwords and DOT password standards. See Section 1.10.2 for setting up a security question.
1.3 Accessing the System

Access to the EEBACS modules is via the Internet (all modules). [At this time the off-line Construction module is still under development and not available for use].

1.3.1 Access through the World Wide Web (www)

To access EEBACS through the “www” enter:

https://eebacs fhwa dot gov/

1.3.2 Access off-line

The Off-line Construction Module is still under development and not available for use.

1.3.3 How to Login

1.3.3.1 Login with Username and Password

Upon successfully navigating to the EEBACS Login page, input:

A. the Email address (provided);
B. your password; and
C. Select the “go” button.
D. Do not toggle on the “Keep me logged in on this computer” box.
Upon entering a valid username and password, the EEBACS Terms and Conditions and Rules of Behavior will appear.

💡 Forgot password? See Section 1.3.3.1.1.

Select “Accept” to enter EEBACS. (If you select “Decline” you will not be logged into EEBACS).
Successful access into the program will bring the user to the home page. If not successful, contact your Local Division’s IT Service Desk (Government and internal contract employees) or your COTR (Construction contractors, A/E firms, or external contract employees).

Depending on a user’s “rights”, various parts of the system can be viewed or manipulated. Rights are granted based upon the signed User Account form (EEBACS-001, EEBACS-002, and/or EEBACS-004), and entered into the system by your Local IT Service Desk when an account is first established. Rights may be changed depending on assignments and duties.

If you do not feel appropriate "rights" have been assigned, contact your COTR, your local Component Lead, or the EEBACS Division Administrator. (In most cases additional, project specific user rights are granted when the user is added as a member of a Project Team. For Design users, see Chapter 2.3. For Construction users see Chapter 4.5).

1.3.3.1.1  Forgot Password

TheForgot Password function is only relevant when logging in with Username and Password method.

SelectForgot My password
Chapter 1 - System Overview

A. Enter the email address used for EEBACS
B. If the user has set up a security question, it will appear here
C. Enter the answer to your security question
D. Select “Go”

E. Confirming message appears.
   (The emailed password will come from noreply@symplicity.com).

1.3.4 How to Logout

When a session is finished select the “Logout” hyperlink in the upper right corner of the screen.
To assist in program security, close the browser window or lock your workstation.
1.4 Home Page

Upon logging into the system the user first views the “Home” page. This page consists of:

A. Sidebar menu to navigate between the various modules, reporting types, Unit Price Analysis (UPA), and My Account (personal profile information);
B. Expandable menu showing the number of people currently using the system;
C. “Announcements” section that informs users of system events;
D. “Recent Items” section that hyperlinks the user to areas within the program that was last visited;
E. Calendar; and
F. “EEBACS Statistics” table that tracks specified items within the system.

Sidebar links and sub-links, Announcements, and Recent Items listing will vary depending on the user’s assigned program rights.

Navigation away from the home page is accomplished by selecting an item from either the sidebar menu or “Recent Items” list.
1.5 Navigation

Navigation through the program can be accomplished using:

- menus; (sidebar or tables);

- bar tabs;

- hypertext links;

- icon buttons; and

- search filters.
1.6 Projects (All) Directory

The Projects (All) link allows the user to navigate to “All” current projects within the system, projects currently residing in the Design/Acquisition/Construction modules or “Archived” projects.

Users with general inquiries will find the Projects (All) or Archived link most valuable when searching for project information; while Design, Acquisition, and Construction personnel will usually select their respective links to perform tasks for assigned projects.

1.6.1 Project (All)

Selecting “Project (All)” will forward the user to the listing of projects. Before filtering of data takes place, the table will show all projects FLH wide that are currently active.

A. The “Search Filter” may be used to show projects by parameters selected. The most commonly used filter is the “Federal Lands Division” pull-down menu which limits viewing of projects to the Division selected (EFLHD, CFLHD, or WFLHD);

B. The first column lists icons allowing access to project data. The “View” icon (as shown) allows a user to access the project information, but not make changes to the data;

C. Milestones indicate the project’s current point in the process; and

D. Status indicates in which module the project is located and which branch is in control of the data.
1.7 <Reserved>

1.8 <Reserved>

1.9 <Reserved>
1.10 My Account

1.10.1 Changing a Password

A user’s password must be changed every 60 days.
If a user’s password has expired, the user will be prompted to reset their password.
The new password cannot be the same as any of the last twelve passwords.

WARNING: If you do not login within 60 days and change your password, your account may be disabled. (After 60 days you will still be allowed to change your password at the prompt; however, you may be unable to access the system with your new password until your account has been reactivated by your local IT Service Desk).

To change a password, if not prompted to, selecting the “My Account” link allows users to change their password.

A. Select “My Account” in the sidebar menu;
B. Input the password sent (current);
C. Input a user generated (new) password;
D. Re-enter the (new) password; and
E. Select “Change password”.

All passwords must conform to the DOT password standards: 12 characters (minimum) length:

- UPPER CASE LETTERS (A through Z);
- Lower case letters (a through z);
- Numbers (0 through 9); and
- Special characters (e.g., !, $, #, %).
Entering a new password that does not meet standards results in the following error statement:

A successful password change results in the following statement:

Contact your local IT Service Desk for login or password assistance. (Do not contact Symplicity).

### 1.10.2 Setting up a Security Question

A security question is needed in case you forget your password and need the System to reset your password and send it to your email address.

Go to the “My Account” link on the sidebar menu; select the “Account Settings” tab.

A. Enter your security question.

B. Enter the answer to your security question. The security answer is case-sensitive.

C. Select “Save”
### 1.11 Terms, Icons, and Abbreviations

The following terms, icons, and abbreviations are for the entire program. Not all icons are available depending on a user’s rights.

#### 1.11.1 Term and Icon Definitions

<table>
<thead>
<tr>
<th>TERM</th>
<th>ICON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add or Add Another</td>
<td></td>
<td>Adds another pay item, duplicate pay item, pay note, etc. Also symbol for “copy”.</td>
</tr>
<tr>
<td>Add a pick</td>
<td></td>
<td>Adds additional data field boxes for input.</td>
</tr>
<tr>
<td>Add an item below</td>
<td></td>
<td>Adds a new data field</td>
</tr>
<tr>
<td>Add Account</td>
<td><img src="image" alt="Add Account" /></td>
<td>Allows addition of another account when an estimated pay item quantity has different funding sources.</td>
</tr>
<tr>
<td>Add Bridge</td>
<td><img src="image" alt="Add Bridge" /></td>
<td>Expands screen to allow input of bridge data.</td>
</tr>
<tr>
<td>Add Column Heading</td>
<td><img src="image" alt="Add Column Heading" /></td>
<td>Adds another data input box for quantities and account numbers when a pay item quantity is subdivided into more than one grouping (see Summary of Quantities report).</td>
</tr>
<tr>
<td>Add GIS Route</td>
<td><img src="image" alt="Add GIS Route" /></td>
<td>Expands screen to allow for GIS data to be inputted.</td>
</tr>
<tr>
<td>Add Master Pay Items</td>
<td><img src="image" alt="Add Master Pay Items" /></td>
<td>Opens master pay item table to allow selection of pay items.</td>
</tr>
<tr>
<td>Add New</td>
<td><img src="image" alt="Add New" /></td>
<td>Module dependent. Adds new Announcements to the system or new Pre-defined Report. Adds new Bid Summary.</td>
</tr>
<tr>
<td>Add New Account</td>
<td><img src="image" alt="Add New Account" /></td>
<td>Adds new account number to project.</td>
</tr>
<tr>
<td>Add New Bidder</td>
<td><img src="image" alt="Add New Bidder" /></td>
<td>Allows bidder information to be added.</td>
</tr>
<tr>
<td>Add New Estimate</td>
<td><img src="image" alt="Add New Estimate" /></td>
<td>Adds a new estimate to a project.</td>
</tr>
<tr>
<td>Add New Schedule</td>
<td><img src="image" alt="Add New Schedule" /></td>
<td>Adds a new schedule to the project.</td>
</tr>
<tr>
<td>Add Temporary Pay Item</td>
<td><img src="image" alt="Add Temporary Pay Item" /></td>
<td>Adds a temporary pay item. Can be used while waiting for a new pay item request to be approved. Projects cannot be forwarded to Acquisitions with temporary pay items included.</td>
</tr>
<tr>
<td>Amendment Issued</td>
<td><img src="image" alt="Amendment Issued" /></td>
<td>Marks an amendment as being issued. Data cannot be modified unless “Undo Amendment Issued” is selected.</td>
</tr>
<tr>
<td>TERM</td>
<td>ICON</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Apply Search</td>
<td><img src="image" alt="Apply Search" /></td>
<td>Finds all data within the selected parameters.</td>
</tr>
<tr>
<td>Asterisk (red)</td>
<td>*</td>
<td>Indicates a data required in a data field.</td>
</tr>
<tr>
<td><strong>B</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Batch Option</td>
<td><img src="image" alt="Batch Options" /></td>
<td>Through a pull down list, allows printing of reports, or deletion of selected pay items.</td>
</tr>
<tr>
<td>BHUP</td>
<td><img src="image" alt="BHUP" /></td>
<td>When selected allows the Bid History Unit Price screen to be accessed.</td>
</tr>
<tr>
<td><strong>C</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cancel</td>
<td><img src="image" alt="Cancel" /></td>
<td>Closes screen without saving inputted data.</td>
</tr>
<tr>
<td>Cancel &amp; Close</td>
<td><img src="image" alt="Cancel &amp; Close" /></td>
<td>Closes a screen or function without saving inputted or calculated data.</td>
</tr>
<tr>
<td>Carat</td>
<td><img src="image" alt="Carat" /></td>
<td>Open/Closes sub-folders, re-orders lists, or items within a pick list.</td>
</tr>
<tr>
<td>CBUP</td>
<td><img src="image" alt="CBUP" /></td>
<td>When selected allows the Cost Based Unit Price screen to be accessed.</td>
</tr>
<tr>
<td>Change Password</td>
<td><img src="image" alt="Change Password" /></td>
<td>After current and new passwords are entered select this icon to change a user’s password when in “My Accounts”.</td>
</tr>
<tr>
<td>Change Settings</td>
<td><img src="image" alt="Change Settings" /></td>
<td>Allows search parameters to be changed.</td>
</tr>
<tr>
<td>Clear</td>
<td><img src="image" alt="Clear" /></td>
<td>When selected, clears all data from fields.</td>
</tr>
<tr>
<td>Clear All</td>
<td><img src="image" alt="Clear All" /></td>
<td>Clears all selected data.</td>
</tr>
<tr>
<td>Clear Item</td>
<td><img src="image" alt="Clear Item" /></td>
<td>Clears all inputted data.</td>
</tr>
<tr>
<td>Close</td>
<td><img src="image" alt="Close" /></td>
<td>Closes screen or function.</td>
</tr>
<tr>
<td>Completed</td>
<td><img src="image" alt="Completed" /></td>
<td>Project marked completed.</td>
</tr>
<tr>
<td>Continue</td>
<td><img src="image" alt="Continue" /></td>
<td>Advances user to the next screen.</td>
</tr>
<tr>
<td>Copy</td>
<td><img src="image" alt="Copy" /></td>
<td>Copy. Also the symbol for “refresh”, “adds”, and “adds another” item. Copies an estimate, adds another pay note, or duplicates a pay item. Also the symbol for refresh previously created reports.</td>
</tr>
<tr>
<td>Copy Estimate</td>
<td><img src="image" alt="Copy Estimate" /></td>
<td>Copies the estimate to create another estimate within the project.</td>
</tr>
<tr>
<td>Create CPL Report</td>
<td><img src="image" alt="Create CPL Report" /></td>
<td>Advances user to next screen for inputting project specific data.</td>
</tr>
<tr>
<td>Create Construction Estimate</td>
<td><img src="image" alt="Create Construction Estimate" /></td>
<td>Calculates the total cost of a schedule once mobilization has been included.</td>
</tr>
</tbody>
</table>
### Chapter 1 - System Overview

<table>
<thead>
<tr>
<th>TERM</th>
<th>ICON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>D</strong></td>
<td></td>
<td><strong>Delete</strong></td>
</tr>
<tr>
<td>Delete</td>
<td>![Delete Icon]</td>
<td>Deletes the adjacent function, deletes most recent entry, or deletes a document.</td>
</tr>
<tr>
<td>Delete</td>
<td>![Delete Icon]</td>
<td>Deletes a project, estimate, or schedule. Once this button is selected, the deleted item cannot be restored.</td>
</tr>
<tr>
<td>Delete All Column Headings</td>
<td>![Delete All Column Headings Icon]</td>
<td>Deletes all previously established column headings.</td>
</tr>
<tr>
<td>Delete report</td>
<td>![Delete Icon]</td>
<td>Deletes a previously generated report.</td>
</tr>
<tr>
<td>De-select</td>
<td>![De-select Icon]</td>
<td>De-selects all items visible on the screen.</td>
</tr>
<tr>
<td><strong>E</strong></td>
<td></td>
<td><strong>Edit</strong></td>
</tr>
<tr>
<td>Edit</td>
<td>![Edit Icon]</td>
<td>When selected, allows function to be edited.</td>
</tr>
<tr>
<td>Edit</td>
<td>![Edit Icon]</td>
<td>When selected, opens function or page to be edited. Also see “Write”.</td>
</tr>
<tr>
<td><strong>F</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>G</strong></td>
<td></td>
<td><strong>Generate</strong></td>
</tr>
<tr>
<td>Generate</td>
<td>![Generate Icon]</td>
<td>Sends the user to a subroutine to calculate a value or report.</td>
</tr>
<tr>
<td>Generate Bid Schedule</td>
<td>![Generate Bid Schedule Icon]</td>
<td>Generates a Bid Schedule for the contract package in Adobe Acrobat and MS Word Excel format.</td>
</tr>
<tr>
<td>Generate Bid Error Report</td>
<td>![Generate Bid Error Report Icon]</td>
<td>Shows any error between inputted and computed bid prices.</td>
</tr>
<tr>
<td>Generate EE Reports</td>
<td>![Generate EE Reports Icon]</td>
<td>Generates an Adobe Acrobat file summarizing project, schedule, and individual item information.</td>
</tr>
<tr>
<td>Generate EE Column Reports</td>
<td>![Generate EE Column Reports Icon]</td>
<td>Generates an Adobe Acrobat file summarizing project, schedule, and individual item by column information.</td>
</tr>
<tr>
<td>TERM</td>
<td>ICON</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Generate PE Summary of Quantities Report</td>
<td>![Generate PE Sum Of Quantities Report Icon]</td>
<td>Generates a Project Engineer’s “Summary of Quantities” in CVS, Excel, and PDF format.</td>
</tr>
<tr>
<td>Generate Summary of Quantities Report</td>
<td>![Generate Sum Of Quantities Report Icon]</td>
<td>Generates a “Summary of Quantities” (as seen in the plans) in CVS, Excel, and PDF format.</td>
</tr>
<tr>
<td>Help</td>
<td>![Help Icon]</td>
<td>Also is used to show entire list of items in a searchable pick list. Future on-line Frequently Asked Questions.</td>
</tr>
<tr>
<td>Import Excel</td>
<td>![Import Excel Icon]</td>
<td>Places bid data into a MSWord Excel spreadsheet.</td>
</tr>
<tr>
<td>Milestone</td>
<td>N/A</td>
<td>A point in the evolution of a project at which a record of that instance is required. Milestones usually coincide with design reviews listed in the Project Development and Design Manual (PDDM) Chapter 9.6.4 Reviews when the project is in Design. Reviews are either descriptive or a percentage. For example: Preliminary Design Review (15% or 30%); Intermediate Design Review (50%); Plan-In-Hand Review (70%); Final PS&amp;E Review (95%); and PS&amp;E Approval &amp; Authorization Review (100%); and Milestones coincide with current Estimate, including any Amendment Estimates in Acquisitions. In Construction the Milestones coincide with status: Awarded, Active, Completed, Disputed, Finaled, terminated</td>
</tr>
<tr>
<td>TERM</td>
<td>ICON</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------</td>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>Move this item up/down arrows</td>
<td></td>
<td>Moves the item up or down in a listing. Also used to change the order of incentive and duplicate pay items.</td>
</tr>
<tr>
<td>N</td>
<td></td>
<td>As in “not” complete or checked “no”.</td>
</tr>
<tr>
<td>Open in New Window</td>
<td></td>
<td>Opens window with header and data.</td>
</tr>
<tr>
<td>PDF</td>
<td></td>
<td>Adobe acrobat file.</td>
</tr>
<tr>
<td>Previous runs</td>
<td></td>
<td>Shows all previous runs of a report.</td>
</tr>
<tr>
<td>Print Report</td>
<td></td>
<td>Prints report for selected or generated data.</td>
</tr>
<tr>
<td>Promote to Acquisition</td>
<td></td>
<td>Sends all project data to Acquisitions upon completion of estimate. Data cannot be retrieved unless released by Acquisitions. Some data can be viewed.</td>
</tr>
<tr>
<td>Q</td>
<td></td>
<td>Allows quick access to various functions and pages.</td>
</tr>
<tr>
<td>QUP</td>
<td></td>
<td>Automatically adds a new quality incentive pay item and sends user to the Quality Unit Price subroutine.</td>
</tr>
<tr>
<td>R</td>
<td></td>
<td>Regenerate reports previously created. Also the symbol for copy, “adds”, or “adds another” item. Copies an estimate, adds another pay note, or duplicates a pay item.</td>
</tr>
<tr>
<td>Regenerate report</td>
<td></td>
<td>Regenerates a previous report with the latest data in the system.</td>
</tr>
<tr>
<td>Regenerate Report</td>
<td></td>
<td>Regenerates a previous report with the latest data in the system.</td>
</tr>
<tr>
<td>Remove Bridge</td>
<td></td>
<td>Removes previously inputted bridge data.</td>
</tr>
<tr>
<td>Remove GIS Route</td>
<td></td>
<td>Removes previously inputted GIS route data.</td>
</tr>
<tr>
<td>Return to Report List</td>
<td></td>
<td>Advances screen to previously generated Ad Hoc Report list.</td>
</tr>
<tr>
<td>TERM</td>
<td>ICON</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Review latest run</td>
<td></td>
<td>Allows viewing of the last version of a report.</td>
</tr>
<tr>
<td>S</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Save</td>
<td>Save</td>
<td>Saves inputted data.</td>
</tr>
<tr>
<td>Save &amp; Close</td>
<td>Save &amp; Close</td>
<td>Saves inputted data and closes window.</td>
</tr>
<tr>
<td>Save &amp; Next</td>
<td>Save &amp; Next</td>
<td>Saves data on current screen and advances to next pay item.</td>
</tr>
<tr>
<td>Save &amp; Previous</td>
<td>Save &amp; Previous</td>
<td>Saves data on current screen and advances to next pay item.</td>
</tr>
<tr>
<td>Save and go to list</td>
<td>save and go to list</td>
<td>Saves inputted data and goes to pay item list.</td>
</tr>
<tr>
<td>Save as Excel</td>
<td>Save As Excel</td>
<td>Save data (or place data and open file) into an MSWord Excel spreadsheet.</td>
</tr>
<tr>
<td>Select all</td>
<td></td>
<td>Selects all items in the screen.</td>
</tr>
<tr>
<td>Set Line Item</td>
<td>Set Line Item</td>
<td>Assigns line item numbers to pay items for a given schedule.</td>
</tr>
<tr>
<td>Submit</td>
<td>Submit</td>
<td>Submits data to generate a report.</td>
</tr>
<tr>
<td>Submit Report</td>
<td>Submit Report</td>
<td>Submits selected data to generate a report.</td>
</tr>
<tr>
<td>T</td>
<td></td>
<td></td>
</tr>
<tr>
<td>U</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undo Amendment Issued</td>
<td>Undo Amendment Issued</td>
<td>Allows an amendment previously issued to be unlocked for manipulation.</td>
</tr>
<tr>
<td>Update</td>
<td>Update</td>
<td>Updates data fields.</td>
</tr>
<tr>
<td>Update All Line Numbers</td>
<td>Update All Line Numbers</td>
<td>When selected, renumbers line item numbers in consecutive order after pay items have been added, deleted, or duplicate pay items reordered.</td>
</tr>
<tr>
<td>Update Line Item</td>
<td>Update Line Item</td>
<td>Updates line item numbers previously assigned to pay items for a given schedule.</td>
</tr>
<tr>
<td>V</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View</td>
<td></td>
<td>Allows user to view the item or project, but does not allow writing or editing. Also icon for “Review latest run”.</td>
</tr>
<tr>
<td>View all results</td>
<td></td>
<td>Allows entire list of items in a searchable pick list to be shown.</td>
</tr>
<tr>
<td>View Next</td>
<td>View Next</td>
<td>Allows advancement to next pay item.</td>
</tr>
</tbody>
</table>
### 1.11.2 Abbreviations

**A**

A+B – Found on the bid schedule. In Part “A” the contractor shows their bid price for the bid items. In part “B”, the Contractor shows the number of days they propose for performing the work.

AL – State of Alabama
AK – State of Alaska
AR – State of Arkansas
Avg – Average
AZ – State of Arizona

**B**

BIA – Bureau of Indian Affairs
BHUP – Bid history unit price
BLS - Bureau of Labor Statistics
BODEE - Bid Opening Disclosure of Engineer’s Estimate

**C**

CA – State of California
CBUP – Cost-based unit price
CCI – Construction cost indexing
CE – Construction Engineering
CEA -
CFL – Central Federal Lands Highway Division
CO – State of Colorado
COE – Construction Operations Engineer
Col - Column
Comp – Completed
CON – Construction
CPL – Cost Per Length
CPM – Critical Path Method
CT – State of Connecticut
CTSM – Contingent sum
cuft – cubic foot
Cur – Current (as in status of estimate)
cuyd – cubic yard

D
DC – District of Columbia
DE – State of Delaware
DI – Design Incentive
DOD – Department of Defense
DOT – Department of Transportation (Federal or State)

E
EE – Engineer’s Estimate
EEBACS – Engineer’s Estimate, Bidding, Award, and Construction system
EFL – Eastern Federal Lands Highway Division

F
FL – State of Florida
FLMA – Federal Land Management Agency
FM – Federated States of Micronesia
FP – Federal Project (as in FP-## or the Standard Specifications for Construction of Roads and Bridges of Federal Highway Projects)
FWS – Fish & Wildlife Service

G
GA – State of Georgia
Gal - gallon
GIS – Geographic Information System
GU - Guam

H
ha – hectare (10,000 m²)
HI – State of Hawaii
HD – Highway Division (as in CFL, EFL, or WFL)
HDM – Highway Design Manager
hr - hour

I
IA – State of Iowa
ID – State of Idaho
IGE – Independent Government Estimate
IL – State of Illinois
IN – State of Indiana

J

K
kg - Kilogram
km – Kilometer (1,000 meters)
KS – State of Kansas
KY – State of Kentucky

L
l – Liter
L – Level, AASHTO terrain type
LA – State of Louisiana
Lat - Latitude
lb – pound
lnft – linear foot
Long - Longitude
LPSM – Lump sum

M
m – Meter
M – Mountainous, AASHTO terrain type
m2 – square meter
m3 – cubic meter
MA – State of Massachusetts
Mat - Material
Max - Maximum
MD – State of Maryland
ME – State of Maine
MFBM – thousand board feet (lumber)
MGAL – thousand gallons
Mgr - Manager
MH – Marshall Islands
MI – State of Michigan
Min - Minimum
MN – State of Minnesota
MP – North Mariana Islands
MO – State of Missouri, or
MO - Month
MS – State of Mississippi
MT – State of Montana

N
N – Normal pay item type
NC – State of North Carolina
ND – State of North Dakota
NE – State of Nebraska
ND – State of North Dakota
NH – State of New Hampshire
NJ – State of New Jersey
NM – State of New Mexico
NM – Normal pay item with materials incentive
No – Number
NPS – National Park Service
NR – Normal pay item with roughness incentive (IRI)
NS – Normal pay item with smoothness incentive (PRI)
NV – State of Nevada
NY – State of New York

O
O&P – Overhead & Profit
OH – State of Ohio
OK – State of Oklahoma
OR – State of Oregon

P
PA – State of Pennsylvania
PDF – Portable Document Format (Adobe Acrobat file)
PE – Project Engineer or Project Engineering
PFH – Public Forest Highway
PLH – Public Lands Highway
PM – Project Manager
PR – Puerto Rico
PRA – Public Roads Allocated
PW - Palau

Q
Q_ - Quality incentive (M = Materials, R = International Roughness Index (IRI), 
   S = Smoothness (PRI)
QUP – Quality unit price

R
R – Rolling, AASHTO terrain type
RI – State of Rhode Island
RRP – Refuge Road Program

S
SC – State of South Carolina
Sched – Bid Schedule
SD – State of South Dakota
SLRY – slurry unit
sqft – Square feet (foot)
sqyd – Square yard
STA – Station (100 feet)
Sum - Summary

T
t – metric ton (1000 kilograms)
TN – State of Tennessee
TX – State of Texas

U
UPA – Unit Price Analysis
US – United States
USC – U.S. Customary
USFS – United States Forest Service
UT – State of Utah

V
VA – State of Virginia
VI – Virgin Islands
VT – State of Vermont

W
WA – State of Washington
WFL – Western Federal Lands Highway Division
WI – State of Wisconsin
WV – State of West Virginia
WY – State of Wyoming

X

Y

Z
1.12 Requesting Assistance

For Contractor Employees working off-site – Contact the Contracting Officer’s Technical Representative (COTR). They will submit your request or recommendation to the appropriate Local IT Service Desk, Component Lead, or EEBACS Division Administrator.
Chapter 2 - <Reserved>
Chapter 3 - <Reserved>
# Chapter 4 - Construction Module

## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.0.1</td>
<td>Preface</td>
<td>4-3</td>
</tr>
<tr>
<td>4.0.2</td>
<td>Reserved</td>
<td>4-3</td>
</tr>
<tr>
<td>4.0.3</td>
<td>Navigation</td>
<td>4-3</td>
</tr>
<tr>
<td>4.0.3.1</td>
<td>Home page navigation</td>
<td>4-3</td>
</tr>
<tr>
<td>4.0.3.2</td>
<td>Side bar navigation</td>
<td>4-3</td>
</tr>
<tr>
<td>4.0.3.3</td>
<td>Construction list navigation</td>
<td>4-4</td>
</tr>
<tr>
<td>4.0.3.4</td>
<td>Project tab navigation</td>
<td>4-5</td>
</tr>
<tr>
<td>4.0.3.5</td>
<td>Return to last screen or list navigation</td>
<td>4-5</td>
</tr>
<tr>
<td>4.0.3.6</td>
<td>Within project navigation</td>
<td>4-6</td>
</tr>
<tr>
<td>4.1</td>
<td>Project Info</td>
<td>4-7</td>
</tr>
<tr>
<td>4.2</td>
<td>Reserved</td>
<td>4-8</td>
</tr>
<tr>
<td>4.3</td>
<td>Reserved</td>
<td>4-8</td>
</tr>
<tr>
<td>4.4</td>
<td>Reserved</td>
<td>4-8</td>
</tr>
<tr>
<td>4.5</td>
<td>Team</td>
<td>4-9</td>
</tr>
<tr>
<td>4.6</td>
<td>Construction</td>
<td>4-10</td>
</tr>
<tr>
<td>4.6.1</td>
<td>Core</td>
<td>4-10</td>
</tr>
<tr>
<td>4.6.1.1</td>
<td>Initial core after Contract Award</td>
<td>4-11</td>
</tr>
<tr>
<td>4.6.3</td>
<td>Progress Payment</td>
<td>4-12</td>
</tr>
<tr>
<td>4.6.3.1</td>
<td>Review Zero Progress Payment</td>
<td>4-13</td>
</tr>
<tr>
<td>4.6.3.2</td>
<td>Add, View, Edit Progress Payment</td>
<td>4-14</td>
</tr>
<tr>
<td>4.6.3.3</td>
<td>Grand Summary</td>
<td>4-15</td>
</tr>
<tr>
<td>4.6.3.4</td>
<td>Pay Notes</td>
<td>4-17</td>
</tr>
<tr>
<td>4.6.3.4.1</td>
<td>Add Pay Note</td>
<td>4-18</td>
</tr>
<tr>
<td>4.6.3.4.2</td>
<td>Edit and Approve Pay Notes or Check Status of Pay Notes (Submitted to PE)</td>
<td>4-21</td>
</tr>
<tr>
<td>4.6.3.5</td>
<td>Pay Note Summaries</td>
<td>4-22</td>
</tr>
<tr>
<td>4.6.3.5.1</td>
<td>Process Pay Note Summaries</td>
<td>4-22</td>
</tr>
<tr>
<td>4.6.3.6</td>
<td>Non CM Pay Items</td>
<td>4-26</td>
</tr>
<tr>
<td>4.6.3.7</td>
<td>Period</td>
<td>4-27</td>
</tr>
<tr>
<td>4.6.3.7a</td>
<td>Progress Payment Account (subtab)</td>
<td>4-27</td>
</tr>
<tr>
<td>4.6.3.8</td>
<td>Reserved</td>
<td>4-28</td>
</tr>
<tr>
<td>4.6.3.9</td>
<td>Progress Payment Tracking</td>
<td>4-28</td>
</tr>
<tr>
<td>4.6.4</td>
<td>Subcontractors</td>
<td>4-29</td>
</tr>
<tr>
<td>4.6.5</td>
<td>Labor/Equipment</td>
<td>4-32</td>
</tr>
</tbody>
</table>
4.6.6 Daily Reports

4.6.6.2 Add Specific Notes
4.0.1 Preface
The Construction Module provides the capability to:

- Create, track and approve daily reports (both Inspector and Contractor Daily Reports), daily diaries, pay notes, and progress payments for the contractor.
- Generate a detailed description of how the project was constructed, including materials, equipment, and personnel.
- Add and track Contract Modifications
- Add status report updates
- Add and track claims

4.0.2 < Reserved >

4.0.3 Navigation
Navigate to projects using the sidebars menus. User can also access projects that have been recently worked on using the Recent Items list on the Home Page.

4.0.3.1 Home page navigation
Upon logging into the program, the user will encounter the Home tab or page. The home page allows you to navigate by either the sidebar or most recent item visited.

D. Select any category on the sidebar; or
E. Select from any of the most recent user entries.

4.0.3.2 Side bar navigation
The most commonly used categories on the sidebar are “Projects All” and “Construction”. This enables the user to view a listing of all projects within the system or the Construction module.
A. Select “Projects All” to view a listing of all projects within the system; or
B. Select “Construction” to view a listing of all projects in the Construction module.

4.0.3.3 Construction list navigation
A. Allows for filtering of data by the constraints selected;
B. Previous provides viewing for the previous 20 projects
   Next - provides viewing for the next 20 projects
   Jump - provides ability to jump to a different page of 20 projects.
   Projects are listed in groups of 20 projects, Jump allows the user to “jump” to a new page of 20 projects (setting Jump to 3 would show projects 41-60);
C. Indicates sequence of projects being viewed and total number of projects meeting the filtered criteria
4.0.3.4 Project tab navigation

Once a project is selected, access to sub-activities within the module is by tabs.

A. Tabs and sub-tabs allow access to various functions.

4.0.3.5 Return to last screen or list navigation

A. Allows return to the recent screen (return) or depending on location the Construction/Project list.

Do not use the Internet Explorer “back” button to return to the last screen.
4.0.3.6 Within project navigation

A. Allows return to selected hyperlink location; and

B. Navigation can also be accomplished by using tabs. White colored tabs indicate path to active tab and the active tab of the current window.

**WARNING:** Save data inputs in the current tab before accessing another tab or data may be lost.

Not seeing the screen you expect when in a tab? Try selecting the “Close” or “Cancel” icon. EEBACS saves the last sub-screen you viewed when last in the tab.
4.1 Project Info

Project information is descriptive data specific to the project. Project data cannot be edited once project has been transferred from Acquisitions to Construction.

Immediately upon receiving the Project from Acquisitions, verify all the information on the Account Tab, the Construction Core tab, and the Progress Payment 0 - Grand Summary Tab, see Sections 4.4.1, 4.6.1, and 4.6.3.3. If information is incorrect send back to Acquisitions for correction (Re-Open Acquisition).

- If a project has been Re-Opened in Acquisition, the Construction tabs and features will disappear and not be available to users until the project is re-sent to Construction.

- The ability to send back to Acquisitions (Re-Open Acquisition button) is no longer available once the first Pay Note summary is added to the first progress payment.

- If a project is re-opened in Acquisition, the Construction tab and features will not be available to users, until the project is re-sent to Construction.
4.2 <Reserved>

4.3 <Reserved>

4.4 <Reserved>
4.5 Team

The team tab allows assignment and archiving of project team members (project roles). In order to add a project team member, they must have a valid, enabled EEBACS account. See Chapter 1 for new user account forms. After being assigned to the project, that team member will have rights associated with their project role. Only project team members are able to create and edit documents or be included on reports.

Roles with right to assign, edit, delete team members (project roles): Component Lead and Construction Admin staff. All other construction roles have view team rights only.
4.6 Construction

4.6.1 Core

The core construction tab is a project information page for Construction that shows Contractor, Award, and Project information.

All roles have view rights of the core tab; except all Construction Contractor roles will not see the Award data.
4.6.1.1 Initial core after Contract Award

A. First go to Team Tab to add Team Members, at minimum add: Construction Contractor Manager (if Contractors will be using EEBACS), Project Engineer, and COE. Also add Inspectors and Construction Contract Users. See Section 4.5

**WARNING:** When selecting the Construction Contractor Manager, ensure the role is assigned to a user from the Prime Contractor. (If a subcontractor user is selected as the Construction Contractor Manager the Company name on the status page will be changed). The Company name and address that appears here, also appears on the Progress Payment Reports, Status Reports. If the Construction Contract Manager changes, ensure that a new Construction Contractor Manager is immediately assigned from the Prime Contractor according to User Account Request Procedures. (The Construction Contractor Manager’s address should always be the official Contract Address).

B. Verify Award data from Acquisitions if incorrect Send Back to Acquisition (see Section 4.1);

C. Project data from Design
Example with Team Members added:

![Construction Module Screenshot]

- Construction field staff will have home Division office address in EEBACS. If the field staff has a permanently assigned cell phone, it is preferred that the permanently assigned cell phone number be used rather than a project specific phone number.

### 4.6.3 Progress Payment

Progress Payments is where all tasks related to processing progress payments occurs, including: adding and approving pay notes, processing pay note summaries, adding non-CM pay items, and progress payment tracking and approval.

Each Progress Payment is automatically assigned a pay period number starting from zero. The progress payment number shows on all of the screens and pay documents. It is important to make sure you are in the proper progress payment before taking any action.
4.6.3.1 Review Zero Progress Payment

At the beginning of each project you should review the initial “Zero” progress payment that is developed from the awarded items to verify it is correct and complete. No items are ever paid on the initial pay period. No specific dates are related to the initial pay period.

A. Select “View” - automatically sends you to Zero Progress Payment’s Grand Summary tab

B. Print Progress Payment Report to review pay items, description, quantities, account splits, unit prices for conformance with Contract.
4.6.3.2 Add, View, Edit Progress Payment

Roles with create new/delete progress payment rights include: Construction Component lead, Construction Admin staff, COE (project) and all Project Engineer roles.

A. Select “Add New” – Adds a new Progress Payment and automatically brings you to the Grand Summary tab for that Project Payment (new progress payment start date automatically begins the day after the close of the previous period)

B. Select “View” or “Edit” to go to an existing Progress Payment’s Grand Summary tab

C. The status of each Progress Payment can be checked and monitored from the Progress Payment tab. The possible statuses of a payment are:
   - Current – The progress payment is active in the Field. There may be 2 payments in Current status at one time (ex. Finishing last month’s and starting this month’s)
   - Submitted – The Progress payment has completed initial creation, review, and Field approval and is in the Main office for further editing, review, and final approval.
   - Approved – The progress payment has been approved by the Main office and is awaiting confirmation of the payment to the contractor.
   - Paid - Progress payment has been paid by Finance to the contractor.

D. Each payment is assigned a type depending on the project completion. The progress payment types are:
   - Initial - Shows items as awarded by contract.
   - Progress – Project is underway and this is an estimated progress payment
   - Semi-final - Project has been completed and project quantities are finalized by the field
   - Final – Project has been checked and reviewed and all quantities and documentation are complete and agreed - this is the Final voucher for the contract.

To edit progress payment Start and End dates, select the Period Tab from the Grand Summary. See Section 4.6.3.7
4.6.3.3 Grand Summary

This is the main tab (or jump-off point) for developing a progress payment. The left column has symbols which either initiates an action and/or represents status of pay notes/pay note summaries, as described below.

Icons in left-most column of the Grand Summary, shown for each pay item:

- “Add new pay note” (this symbol will not appear in the zero progress payment period);
- “Edit pay note” This includes editing, submitting, approving, and rejecting pay notes;
- (#) – shows the number of existing pay notes, if more than one

The Circles shown on the left side are all icons that will take you to the Pay Note Summary for that specific pay item as well as show you the status of the pay item. The White circle will ‘fill in’ and change colors as the Pay Notes and Pay Note Summary move through the process for the particular progress payment period shown.

- White circle (empty circle):
  - No active pay notes or retent exist
  - Pressing the white circle sends you to the Pay Note Summary where you can edit probables.
Chapter 4 - Construction Module

- **Orange/brown circle (1/3 filled circle):**
  - Pay notes exist (pay notes may be draft, pending review, rejected, or approved)
  - Note: To edit, submit to PE, or approve pay notes use “edit icon” (or go to the Pay Notes tab)
  - Pressing the orange/brown circle sends you to the Pay Note Summary where you can edit probables, enter item comments, and view limited pay note information to-date (pay notes may be draft, pending review, or approved).
  - Instead of pressing the circle, the user can go to Pay Note Summary Tab and select pay item.

- **Green circle (2/3 filled circle):**
  - All pay notes have been approved, the Pay Note Summary is ready to be processed and added to payment
  - Pressing the green circle sends you to the Pay Note Summary where you can edit probables, enter item comments, and view limited pay note information (all pay notes are approved). Now you finally have the ability to enter “retent” and then “Add to Payment.”
  - Instead of pressing the circle, the user can go to Pay Note Summary Tab and select pay item.

- **Blue circle (completely filled circle):**
  - All pay notes are now finalized and the Pay Note Summary has been processed and added to payment
  - Pressing the blue circle sends you to the Pay Note Summary where you can “Remove from Payment” in case you need to add more pay notes or edit the pay note summary.
  - Instead of pressing the circle, the user can go to Pay Note Summary Tab and select pay item.

- **“View Pay Note(s)”:**
  - This is the icon combination after the progress payment has been sent to the Office. The Pay Note Summary is no longer active for the period. Pay Notes and Pay Note Summary can no longer be edited in the Field.
  - This is the icon combination in the new progress payment period if Retent was withheld on the pay item in the previous payment period – Notice that no pay note is present for the current pay period, but there is information to be processed on the Pay Note Summary for the current payment period.
Chapter 4 - Construction Module

A. Contract Amount. Includes all original Bid Items and Incentives (such as quality incentives, partnering, asphalt escalation, etc.) at award.

B. Revised Contract Amount: Contract Amount + pay items added/deleted/modified with a signed Contract Modification. (Revised Contract Amount does NOT include added non-CM pay items).

C. Current Amount – Current Progress Payment Period includes all approved Pay Note Summaries

D. Previous Amount – Total of all previously approved progress payments

E. To-date Progress Payment: Current Amount + Previous Amount

F. Probable Amount. Total Probable for all pay items, including original contract bid items and original contract incentives, added non-CM pay items, and all pay items added/deleted/modified with a signed Contract Modification

G. Percent work completed. The percent work completed does not include the retained quantities.

4.6.3.4 Pay Notes

This section allows the users to add, edit, and approve pay notes.

Roles with create/edit pay note rights: Component Lead, Construction Admin Staff, Construction Contractor roles (project), COE (project), all Inspector, PE’s and Assistant PE roles (project). Most users can only edit their own pay notes. PE roles, the Component Lead, and the Construction Admin staff roles can edit other users’ pay notes.

Roles with ability to approve, reject, and assign as info only pay notes: Construction Component Lead, Construction Admin Staff, PE/Assistant PE roles (project).
4.6.3.4.1 Add Pay Note

Select icon to add new pay note. (Pay notes can only be added from the Grand Summary. Pay notes cannot be added from the pay note tab). If you have multiple progress payments in current status, check to be sure you are in the correct progress payment period before adding a pay note. Pay notes cannot be moved between periods.

The system will automatically generate a new pay note with the pay item’s basic information.

A. Input Pay Note date
B. Select Work date start date
C. Select Work date end date
D. Enter Location/description – describe where the work was done and what was done
E. Input pay quantities by account – input entire measured quantity. The retent and partial payment calculations will be made separately. See Sections 4.6.3.4.2 and 4.6.3.5.
F. Enter Remarks/Calculations – input any calculations or remarks related to measurement and payment. If the person(s) actually measuring in the field is not selected in the Measured by box (see next screen shot), enter the actual name(s) here.
G. Select “Add Entry” when you need to add a new pay note entry

H. Enter Total production days – the number of days it took to complete the work

I. Select Measured By – The person responsible for the measurement (in the case of contractor measured by, it may not be the person measuring in the field). If the person actually measuring is the field is not selected here, enter the actual name in the Remarks/Calculation narrative box (see “F” previous page)

J. Select FHWA Inspector, if applicable – May include A/E staff inspectors (C.I.’s)

K. Select Contractor Inspector, if applicable – This is the Construction Contractor Inspector

L. Toggle Interim or Final

M. Select “Add Document” to add any pertinent documents to this pay note

N. Enter Reference – If there are hardcopy files, describe document location.

O. Print Preview – generates a PDF version of FHWA Pay Note with Probables

P. Print Preview (Contractor Version) – generates a PDF version of FHWA Pay Note without probables

Q. Select “Submit to PE” when pay note is completed

As soon as a pay note has been added, the Grand Summary circle becomes orange/brown (1/3 filled circle). Pay notes may be draft, pending review, or approved.
For Inspectors (both FHWA and Contractors), select “Submit to PE” when pay note is completed.

**Warning:** Once a Pay Note has been Submitted to the PE, it can NOT be deleted from the system. If a pay note is in error, the PE must either reject the pay note for it to be corrected and resubmitted OR the PE must approve it and mark it form information only. See Section 4.6.3.4.2.

The following certification appears:
4.6.3.4.2  Edit and Approve Pay Notes or Check Status of Pay Notes (Submitted to PE)

To access previously created pay notes for a specific item, regardless of pay note status:

Either select edit icon

Or select Pay Notes tab

Do NOT use the circle icons to access individual pay note – these icon access the pay note summaries

A. Select “edit icon” to edit pay note, submit pay note to PE, or to approve pay note.

B. Pay Note Status
   - Draft – Pay note has not yet been submitted to PE (and may still be deleted)
   - Pending review – Pay note has been submitted to PE, but not yet reviewed by PE
   - Approved – Pay note has been approved by PE
   - Rejected – Pay note has been rejected by PE
   - Finalized – Pay note summary (which includes this approved pay note) has been finalized

To quickly find pay notes, use filters as appropriate
**Warning:** Once a Pay Note has been Submitted to the PE (status "pending review"), it can NOT be deleted from the system (because it is a legally signed document).

If a pay note is in error, the PE must either reject the pay note for it to be corrected and resubmitted OR the PE must approve it and mark it form information only.

Pay notes must be reviewed and processed by FHWA. Only approved pay notes will become part of the payment to the contractor. The PE reviews and approves the pay notes, including, proper pay item, date, location, calculations, any attached documents, and to verify that quantities and documentation are acceptable and are approved for payment.

The PE has the following options for a pay note that is pending review:

- Reject the pay note – this returns pay note back to the submitter
- Approve the pay note – this adds the pay note quantity to the pay note summary for payment processing
- Edit pay note – it is FLH best practice for the PE not to edit pay note submitted by others, but to reject the pay note for correction by the original submitter. It is recognized that in some instances the PE may need to edit pay note for expediency/efficiency in order to meet payment deadlines. When editing pay notes, the PE should clearly document in the Review notes the changes that were made
- Mark single entries or entire pay note "For information Only". Entries or pay notes marked “For information Only” will not be included for payment. (Will be labeled as I/O on Pay Note Summary). After being marked, the pay note can then be approved.

Pay notes marked as “For Information Only” will not be included the production rate calculations. Total Production Days may need to be edited to reflect the smaller quantity.

### 4.6.3.5 Pay Note Summaries

The Pay Note Summary is where probables can be updated, retent added, and where the PE finalizes individual pay items for payment and add the summary to progress payment period. A Pay Note Summary can be temporarily removed (pulled back) from payment to be re-opened for editing.

The Pay Note Summary is also where you can access a list and view all the Pay Notes for the individual pay item for the current period and for all periods.

*Roles with the right Process and Pullback Pay Note Summary: Construction Component Lead, Construction Admin Staff, COE (project), Project Engineers/Assistant Project (project).*

#### 4.6.3.5.1 Process Pay Note Summaries

A green circle for the final processing of the pay note summary will not appear until all pay notes for that pay item have been approved. However the payment remarks, probables, and probables remarks on the Pay Note Summary may be edited prior to all pay notes being approved.

Either from the Grand Summary select green circle (2/3 filled circle)
Or select Pay Note Summaries tab

If Pay Note Summary is accessed through the Pay Note Summary tab, select pay item for which you want process the Pay Note Summary.

A. Status:
- Draft – some pay notes have not yet been approved
- Pending – all pay notes have been approved, but pay note summary has not been added to payment
- Processed – Pay note summary has been added to payment
A. Enter Payment Remarks – The remarks can be general or progress pay period specific. These remarks remain visible for all periods, unless removed and appear on both the FHWA and Contractor Reports.

B. Press Link to show Full Pay Note Summary, includes all previous and current progress payment period pay notes for this pay item

C. Press Link(s) to show current period pay note details

D. Pay note quantity totals by account for this pay period

E. Total Quantity = Pay note quantity totals for this pay period

F. Pay Item Totals = All pay notes paid previous pay periods + pay notes this pay period – retent(s) this pay period

G. Program automatically adds previous payment period’s retent back in to be paid and is included in Pay Item Total
H. Enter retent this period by account (In order for "F" to recalculate based on added retent, “save”)

I. Enter remarks by account

If Progress Payment Section with retent does not appear, there are pay notes that have not yet been approved; therefore the pay note summary cannot be completed.
J. Print Preview (Contractor Version) - Pay Note Summary Report

4.6.3.6 Non CM Pay Items

Non-CM pay items are items that can be added to the contract without a contract modification.

Non-CM pay items are either:

- Pay Item specific, such as materials-on-hand, quality incentives, and preparatory work, etc.
- Non pay item specific, such as liquidated damages, interest, lab trailer payments, etc.

Do not delete non-CM pay items, unless they have been added in error. If non-CM pay items have been added correctly, but are no longer needed, adjust via the probables and/or pay notes.

Roles with create, edit, delete non-CM pay items rights: Construction Component lead, Construction Admin staff, COE (project), Project Engineers/Assistant PE (project)

From Grand Summary tab, print out a copy of the government receiving report (in order to have copy of line item numbers), prior to adding non-CM pay items.

Click 'Add New' to start the process for adding a new Non CM item.
A new screen will open for the non cm item. The first step is to decide if it is a Pay Item Specific or Non Pay Item Specific. See the following sections for instructions for each option.

4.6.3.7 Period

This where progress payment period dates can be set or edited. Periods are usually one month, they cannot overlap, and there can be no gaps between periods. This is also where the progress payment type is selected.

Roles with edit period rights: Construction Component Lead, COE (project), Project Engineers, and Assistant PE’s (both in-house & AE).

Roles with delete period rights: Construction Component Lead, Construction Admin Staff, COE (project), Project Engineers, and Assistant PE’s (both in-house & AE)

See Progress Payment list for checking status, type, and period dates for all progress payment periods.

4.6.3.7a Progress Payment Account (subtab)

The purpose of the Account (subtab) is to capture the account data for a specific progress payment period. Once the progress payment period is approved, this account subtab locks the account data as of the approval date for the specific progress payment period.
4.6.3.8 <Reserved>

4.6.3.9 Progress Payment Tracking

The Progress Payment Tracking tab tracks important progress payment dates, payment comments, payment supporting documentation, as well as allowing the office to approve payments.

Roles with ability to enter/edit/approve Progress Payment and tracking: Component Lead, Construction Admin staff, COE (project).

Most users can only view the Progress Payment Tracking Tab.

Users can edit and view information for all progress payments regardless of which payment period they selected. From the Progress Payment Tracking tab:

A. Pay Period Number
B. Select Contractor’s Invoice Received Date
C. Select Contractor’s Cert Received Date
D. Select Progress Payment Approved Date. Filling in this date locks the Progress Payment and changes the status to “Approved.”. Information can no longer be added or edited by the Office (or the Field), unless the Progress Payment Approved date is “cleared.” The 14 day time count in EEBACS begins at the Progress Payment Period Approved date (which is the date a non-defective invoice is received).
E. Select Construction Days to Process (default: 10). This value can be changed to allow enough time to process the Progress Payment to Finance in time, adjusting time for non-work days.
F. Date Due to Finance: Contractor’s Cert received date + Construction Days to Process
G. Select Actual Date to Finance
H. Days to Payment (default: 14). Change this value to 30 days if it is the Final Progress Payment.
I. Due Date for Payment: Contractor’s Cert received date + Days to Payment
J. Select Actual Payment Date. This changes the Progress Payment Period status to “Paid.”

WARNING: Once the Actual Payment Date has been entered, the Progress Payment is finalized and the payment or any contract modifications added during this payment period can never be modified. Even if the date is cleared, no modifications can be made.
K. Add Document (including rejected invoices). When naming documents include Progress Payment # in filename

4.6.4 Subcontractors

This is where Subcontractors are added and edited in this system to track basic information about subcontractor types, contracts, and work activities. Subcontractors must be added to the system prior to their Labor and equipment being added. Only Subcontractors added into this project will be selectable for Daily Reports. Use documentation provided by the Prime Contractor such as the SF1413 or Division specific forms.

Roles that have rights to Create Subcontractors: Construction Component Lead, Construction Admin staff, COE (project), Lead Inspector, all Project Engineer roles. Also, Construction Contractor Lead, Construction Contractor Manager.

Roles that have rights to edit Subcontractors: Construction Component Lead, Construction Admin staff, COE (project), Lead Inspector, all Project Engineer roles. Also, Construction Contractor Manager.

Roles with Delete Subcontractors: Construction Component Lead, Construction Admin staff, COE (project), all Project Engineer roles

On the Subcontractor Tab:

- Select “Add New” to add Subcontractor
A. Enter Subcontractor name (company name)
B. Select Type (multiple selections can be made, see sf1413s or Division specific form)
C. Enter Phone number (main office)
D. Enter Cell phone number (of primary contact)
E. Enter Fax number (main office)
F. Enter Email address (main office)
G. Primary Address (main office)
H. Enter Contact person (main office)
I. Select existing, project pay item(s) that the subcontractor will be performing
J. Select work items to be performed on this contract
K. Enter Original Subcontracted Award amount as reflected on SF1413 form
L. Enter Subcontractor Award date as reflected on SF1413 form
M. Enter Final Subcontracted Award Amount
N. Toggle yes/no for SF1413 received
O. Toggle yes/no for SF1413s received (or Division specific form)
P. Add electronic supporting documentation (i.e. SF1413, SF1413s, etc.)
Q. Add remarks (i.e. changes to subcontract or subcontractor, additional contact information, etc.)
R. “Save and Close” sends user back to the Subcontractor list (shown below)

A. Total Subcontracted Amount (calculated): total of all Subcontractor Original Award Amounts (calculated)
B. Percent of Contract Subcontracted (calculated): Total Subcontracted Original Amount/Original Construction Award Amount
C. Icons provide a quick check to see if contractor has submitted proper paperwork. Green ‘check’ means paperwork is submitted and complete, Red ‘X’ means paperwork is missing or is incomplete.

4.6.5 Labor/Equipment

This is where all labor and equipment on the job is added into the system for the Prime Contractor and all subcontractors. Labor and equipment on this tab is what is used in the Daily Reports (IDRs and CDRs) when logging work activities. Labor/equipment must be added and onsite prior to being able to select/add them to Daily Reports.

Roles that have rights to **Create Labor Equipment**: Construction Component Lead, Construction Admin staff, COE (project), Inspector, Inspector A&E, Lead Inspector, all Project Engineer roles. Also, Construction Contractor Lead, Construction Contractor Manager have these rights.

Roles that have rights to **Edit Labor Equipment**: Construction Component Lead, Construction Admin staff, COE (project), Inspector, Inspector A&E, Lead Inspector, all Project Engineer roles. Also, Construction Contractor Manager have these rights.

Roles that have rights to **Delete Labor Equipment**: Construction Component Lead, Construction Admin staff, COE (project), all Project Engineer roles.

On the Subcontractor tab, select “Add New” to add a new labor or equipment entry.
A. Select Labor or Equipment
B. Enter Type/classification (Labor: flagger, backhoe operator, or Davis Bacon classification; Equipment: backhoe, paver)
C. Supplemental Description (Labor: leave blank, specific name, other detail; Equipment: leave blank, Make, model, year of manufacture, license #, identifying mark, etc.)
D. Move-in date
E. Move-out date

Add a new entry for each move-in/move-out period for the same labor or equipment

F. Hourly rate (see Division procedures)
G. Select Contractor or Subcontractor that the labor/equipment is assigned to
H. Add supporting documentation if needed (flagger’s card, equipment spec sheet, inspection log, photograph of equipment, etc.)
I. “Save and Close” sends user back to the Labor/equipment list (shown below)
Paving Machine and Operator are added as a new entry for each move-in/move-out period

```
<table>
<thead>
<tr>
<th>Actions</th>
<th>Type/Classification</th>
<th>Supplemental Description</th>
<th>Labor/Equipment</th>
<th>Contractor/Subcontractor</th>
<th>Move-In Date</th>
<th>Move-Out Date</th>
<th>Hourly Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crew chief</td>
<td>Labor</td>
<td></td>
<td>Triple A Sidewalks</td>
<td>Alyssa Allen</td>
<td></td>
<td>Sep 27, 2010</td>
<td>Nov 03, 2010</td>
</tr>
<tr>
<td>Labor</td>
<td>Labor</td>
<td></td>
<td>Triple A Sidewalks</td>
<td>Alyssa Allen</td>
<td></td>
<td>Oct 13, 2010</td>
<td>Dec 29, 2010</td>
</tr>
<tr>
<td>Bulldozer</td>
<td>Equipment</td>
<td>Excellent Earthwork</td>
<td>2007 Caterpillar Dozer</td>
<td></td>
<td></td>
<td>Oct 15, 2010</td>
<td>-</td>
</tr>
<tr>
<td>Backhoe loader</td>
<td>Equipment</td>
<td>Excellent Earthwork</td>
<td>Cat 450E serial #24507</td>
<td></td>
<td></td>
<td>Oct 25, 2010</td>
<td>-</td>
</tr>
<tr>
<td>Paving Machine</td>
<td>Labor</td>
<td></td>
<td>Testing-R-Use (Contractor)</td>
<td>Billy Allen</td>
<td></td>
<td>Oct 29, 2010</td>
<td>Nov 09, 2010</td>
</tr>
<tr>
<td>Paving Machine</td>
<td>Equipment</td>
<td>Testing-R-Use (Contractor)</td>
<td>AS2252C Vers-A-Mat Asphalt Screed</td>
<td></td>
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<td>Labor</td>
<td></td>
<td>Testing-R-Use (Contractor)</td>
<td>Billy Allen</td>
<td></td>
<td>Dec 03, 2010</td>
<td>-</td>
</tr>
</tbody>
</table>
```
4.6.6 Daily Reports

This is where the Daily Inspections Reports for both Government (IDR's) and Contractors (CDRs) are entered.

Roles with rights to *Create IDR* (includes right to edit/delete their own IDR. Users cannot edit/delete IDR’s developed by others.): Construction Component Lead, Construction Engineer (Branch Chief), COE (project), all government and AE Inspector roles, all government and AE Project Engineer Roles.

Roles with right to *Create CDR* (includes right to edit/delete the own CDR. Users cannot edit/delete IDR’s developed by others.): Construction Component Lead, Construction Contractor Basic, Construction Contractor Lead, Construction Contractor Manager.

Roles with right to *Review and Approve Daily Reports*: Construction Component Lead, COE (project), project Engineer- Temporary, Project Engineer, project Engineer A&E

Component Leads have ability to add/edit their own CDR. They cannot edit the Contractor’s CDRs. (Only purpose for the Component Lead to add/edit a CDR is to assist contractor to trouble shoot)

From the Daily Reports tab, on the Existing Daily Reports subtab:

A. Select Icon to View or Edit Daily Report as necessary

   - If Daily Report status is “pending review”, the edit icon provides access to Approve/Reject the Daily Report for those roles with approval rights

B. Select “Add New”
A. Type: IDR or CDR will be pre-selected based on user’s type (this will not appear until the report has been saved)
B. Select one or more Contractor or Subcontractor(s) (see Division procedures). Only labor and equipment from Contractors/subcontractors selected will be available for use on this IDR/CDR
C. Select date of IDR/CDR
D. Select Shift Start
E. Select Shift End
F. Enter Weather/Temperature
G. Enter Amount of Precipitation
H. Select work activity code - Usually start with the letter A, select next activities in alphabetical order.
I. Describe work activity
J. Describe work activity location
K. Select all applicable work activity pay items. (Pick list includes only project specific pay items)

Multiple work activities can be added to the same Daily Report using separate activity codes

To create and use Daily Reports Templates see Appendix: Save as a Template.
L. Select Add Labor
M. Select Labor classification
N. Enter number of labor for that classification
O. Enter Production time per person
P. Select Delete if classification was entered incorrectly
Q. Labor Total (calculated): Total of all added labor classifications: number of labor classification x production time x hourly rate for each

! The hourly rates are added on the Labor/Equipment tab and may not exist. If hourly rates are not entered, the Labor total may not reflect the true costs.

! If general labor classification staff work different hours, add labor separately on an individual basis
R. Select Add Equipment
S. Select Equipment type
T. Enter Number of equipment type
U. Enter Production time – actual time in operation per each piece of equipment
V. Enter Idle time – time not in operation
W. Select Idle code
X. Select Delete if equipment type was entered incorrectly
Y. Equipment Total (calculated): Total of all added equipment types: number of equipment type x production time x hourly rate for each
Z. Deletes entire work activity (code, description, location, labor, etc.)
AA. If additional work activities are needed, select Add Work Activity.

- The hourly rates are added on the Labor/Equipment tab and may not exist. If hourly rates are not entered, the Equipment total may not reflect the true costs.
- If general equipment classification work different hours, add equipment separately on an individual basis
- If multiple idle codes are needed for the same piece of equipment or for the same equipment classification, add a separate equipment entry for each additional idle code
- Labor and equipment values may not truly reflect the cost. Totals only reflect hourly rates entered on the labor/equipment tab

Not seeing the labor or equipment you need on the dropdown?
- Make sure Contractor/Subcontractor is selected at the top of Daily Report
- Check Move-out/move-in date (labor/equipment must be on site for the date of the Daily Report)
BB. Enter Daily Narrative

CC. Enter Quality Control Narrative Report

DD. Select Traffic Control Checked (if “yes, problems” is selected, a comment box appears)

EE. Select Erosion/sediment control checked (if “yes, problems” is selected, a comment box appears)

FF. Select Unsafe operations observed (if “yes” is selected, a comment box appears)

GG. Select Accidents (if “yes” is selected, a comment box appears)

HH. Add Specific note, see subsection 4.6.6.2

II. Add supporting documentation (such as photographs)

JJ. Print Preview of Daily Report

KK. Submit to PE (report is completed and ready to sign)
If a report is saved without ‘submitting to PE’ it will show as “draft status” on the Existing Daily Report list tab. Once Submit to PE has been selected a certification will appear, select “Agree” to complete submission to PE. (Note: The wording of the certification will depend on whether the Daily Report is an Inspector Daily Report or a Contractor Daily Report).

![Certification Image]

After a Daily Report is submitted, it is shown as “pending review” status on the list tab.

- If the Daily Report is completed by the PE it is automatically approved and no further action is required.

### 4.6.6.2 Add Specific Notes

Specific Notes are used to tag Daily Reports with important and/or unusual issues (i.e., re-occurring issues)

A. If “yes” is selected the following appears

B. Enter new Notes: Describe unusual issue, or...

C. Select existing saved note from drop-down list (once selected, the note will populate in Notes box for editing)

D. Check box to save the current “Notes” for use on future Daily Reports. (i.e. Save Current Notes means it will be added to the above dropdown list)