User Guide Supplement for Construction Closeout Information and Final Project Review Report

APCM 4.1 – CAS 5.6e

Rev. September 23, 2020

TABLE OF CONTENTS

Introduction

Welcome to AASHTOWare Project Construction & Materials, a fast, easy-to-use, web-based system for documenting construction progress, initiating contractor payment, and communicating with your agency's central office administration applications. Construction & Materials focuses on refining the work flow of construction contract management at all agency levels. With Construction & Materials, the field office can manage field-gathered data and then interface with a central office. Construction & Materials allows several users to update contract information, and it implements a shared database to expand an agency's data sharing ability. This user's guide is the key to discovering Construction & Materials' vast capabilities and is a valuable resource both for novice and experienced users.

About This Manual

This document uses different graphics and techniques to help identify important information.

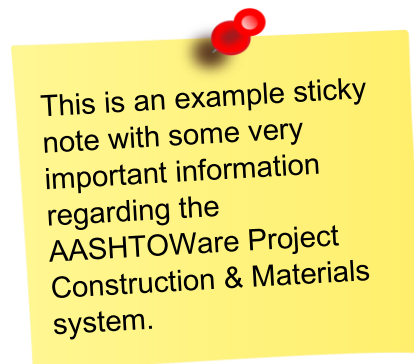**Section Headers**

Each section header will have a title followed by a quick navigation overview as shown below:
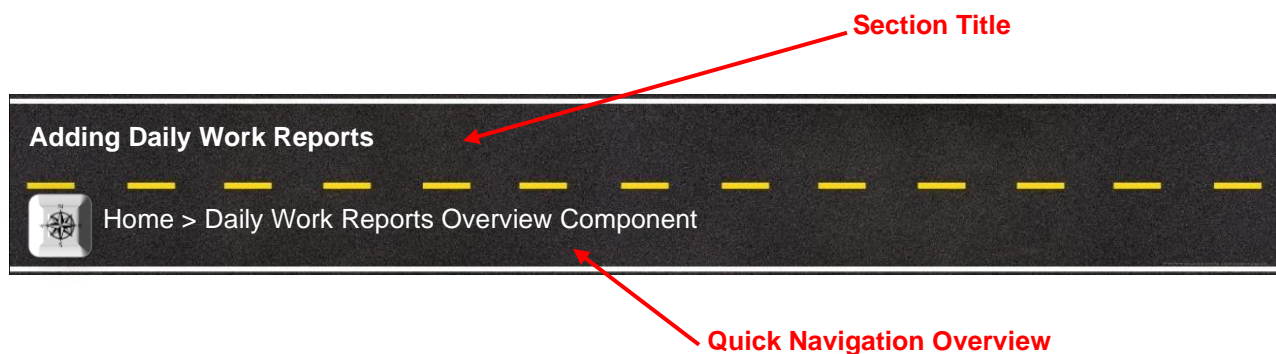
Sticky Notes

Throughout the user's guide we have placed sticky notes with important information, tips and best practices that will help you use the system.

Use of Font Styles

- *Italicized text is used in each section to give general information and comments about the*

system and topic to be discussed.

- Normal text is used for directions and steps listed to accomplish the specified task.
- **Bold** text is used to emphasize navigation steps and actions within a set of directions

Example:

This is an example section of the user's guide that shows the use of different font styles.

1. Click the component **Actions** button and choose the **Select Contract to Add DWR** action.

AASHTOWare Project System Requirements

AASHTOWare Project software is a web-based system that requires no special software installation by the end user. System updates and installations are completed by central office information technology staff. The system is accessed through a modern internet web browser which generally comes already installed with new computers. One of the following web browsers is required to access the system:

- Microsoft Internet explorer 11*
- Google Chrome
- Microsoft Edge

*If you are using a State of Michigan computer supplied by DTMB please complete the following steps to ensure that the correct Microsoft Internet Explorer settings are activated:

1. Open Internet Explorer 11 and verify the following:
    a. Set Compatibility View
        i. From the Tools menu, select **Compatibility View Settings**.
            1. If the Menu bar is not shown, right-click on the Menu Bar and select **Menu Bar**.
        ii. The browser opens a Compatibility View Settings dialog window.
        iii. In the Compatibility View Settings window, clear the **Display intranet sites in Compatibility View** check box.
        iv. Click **Close**.
    b. Set Internet Options
        i. From the Tools menu, select **Internet Options**.
            1. The browser displays the Internet Options dialog box.

These steps only need to be performed once for each SOM computer or workstation that you use.

    ii. On the General tab and under the Browsing History section, click the **Settings** button.

        1. The browser displays the Website Data Settings dialog box.

    iii. On the Temporary Internet Files tab and under the 'Check for newer versions of stored pages setting', click **Every time I visit the webpage** option.

    iv. Click **OK**.

    v. Click the **Advanced** tab.

        1. In the Settings box, scroll down to the Security section, and ensure the **Enable DOM Storage** option is selected.

    vi. Click **OK**.

    vii. Close your Internet Explorer so the new settings will take effect.

Support

For questions regarding the AASHTOWare Project Construction & Materials software, please contact the Construction Technology Helpdesk by phone at 517-322-1556 or by email at MDOT-ConstructionSoftware@michigan.gov. AASHTOWare ACCESS

AASHTOWARE ACCESS

MILogin

https://miloginworker.michigan.gov/ or https://milogintp.michigan.gov/

MILogin is the State of Michigan Identity, Credential and Access Management (MICAM) solution. The MILogin solution provides enhanced single sign-on capabilities in addition to meeting many other business requirements and security and compliance needs.

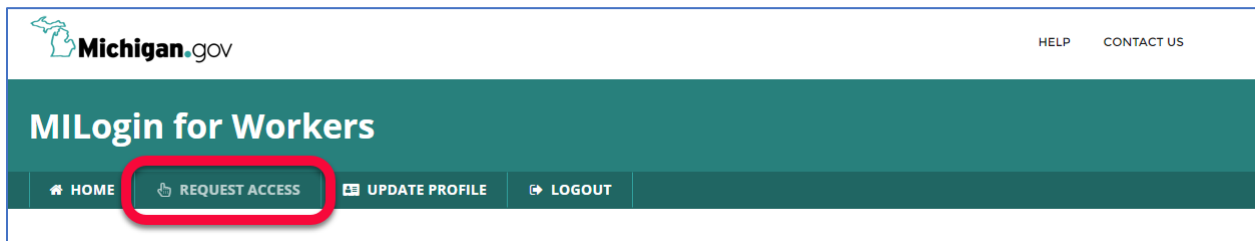*Every user of AASHTOWare Project Construction & Materials accesses the system through MILogin.*

State of Michigan Employees and other users with an "@michigan.gov" email account can access MILogin through the following link: https://miloginworker.michigan.gov/

Consultants, Contractors, Local Agency staff, and other Third-Party users can access MILogin through the following link: https://milogintp.michigan.gov/

To create a MILogin account use the links to the left, click the Signup button, and follow the on-screen directions.

Requesting AASHTOWare Access

1. Login to your MILogin account.

2. Select the **Request Access** button in the top banner.

Michigan.gov   HELP   CONTACT US

MILogin for Workers

⌂ HOME   **👍 REQUEST ACCESS**   **📇 UPDATE PROFILE**   **➡ LOGOUT**

3. Use the search box and enter **AASHTOWare Project**

4. Select **AASHTOWare Project** from the list of applications that appears.

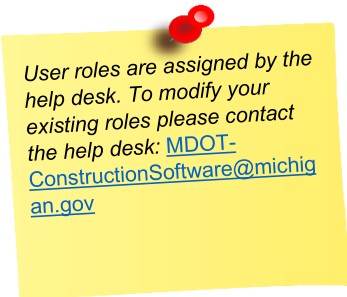5. Follow any remaining on-screen directions.

Once your request is approved you will receive a confirmation email.

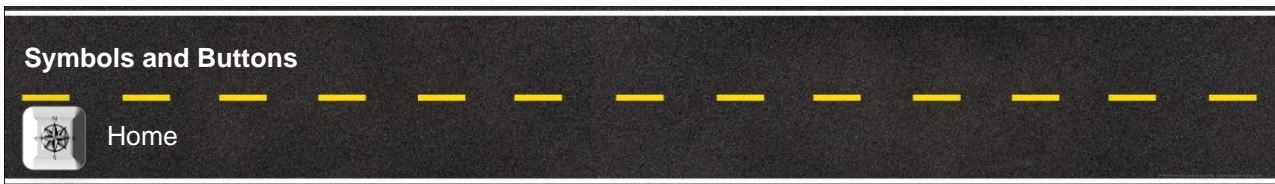## User Roles

MILogin > AASHTOWare Project
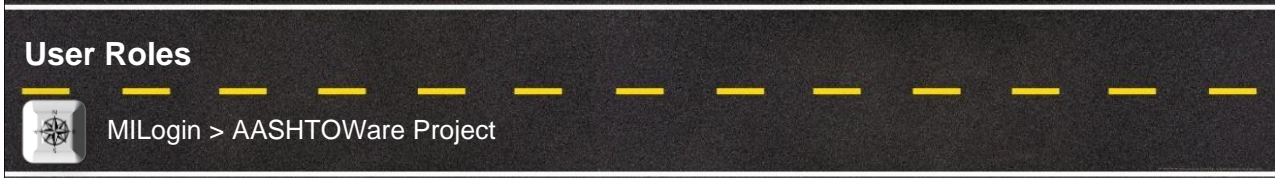
To protect the confidentiality of the information contained inside, the system only displays the information and actions for which a logged-on user has been assigned access rights by means of user roles. User roles combine the permissions needed for several related tasks and allow MDOT to efficiently provide agency and non-agency users with access to the parts of the system they need.

Keep in mind that newly assigned roles do not appear on the Home menu until the next time the user logs on or refreshes the page.

User roles are assigned by the help desk. To modify your existing roles please contact the help desk: MDOT-ConstructionSoftware@michigan.gov

GENERAL NAVIGATION

Symbols and Buttons

Home

| Name	Description	Examples
Action Menu Button	*Display the list of available actions, processes, reports, etc.*	
Chevron Symbol	*Collapse or expand components and rows*	
Return to Top Button	*Return to the top of the page*	
Help Button	*Opens the system help window*	
Search Field Symbol	*Designates the field as a search field, records can be searched and filtered*	
Clear Search Button	*Removes any search filters that may be active*	
Log off Button	*Logs you off and closes the browser window*	
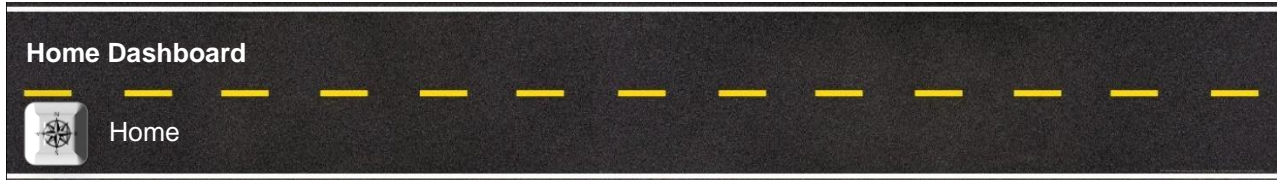
The Home Dashboard is the first screen you seen when you log into the system. Each screen in the system is made up of 4 main parts. The Global Menu, Quick Links, Page Title, and Components.

Global Menu

The global menu is on every screen in the system. It allows you to easily navigate the system.

1. The following buttons are available:

    a. **Home Button** – This button takes you back to the Home Dashboard.
    b. **Home Action Menu** – This action menu allows you to change your role.
    c. **Previous Button** – This button acts like the back button on a web browser and takes you back to the previous page.
    d. **Previous Action Menu** – This action menu lists your most recently visited pages and allows you to quickly navigate back to a page you visited.
    e. **My Pages Button** – This button takes you to a page that lists your bookmarked pages.
    f. **My Pages Action Menu –** This menu allows you to quickly access your bookmarked pages and also allows you to bookmark a page.
    g. **Global Actions Menu –** The menu allows you to access the Global Actions Menu.
    h. **Help Button –** This button opens the system help.
    i. **Log Off Button –** This button logs you out of the system and closes your browser window.
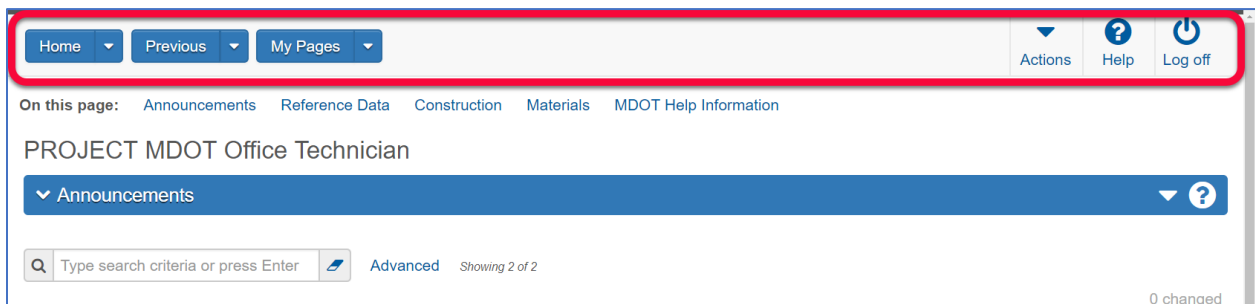

Quick Links

Quick Links are shortcuts provided on every page that will help you quickly navigate the system. Quick Links also change depending on what page you are viewing. Quick Links take you to a specific part of the existing page or a completely different page within the system.
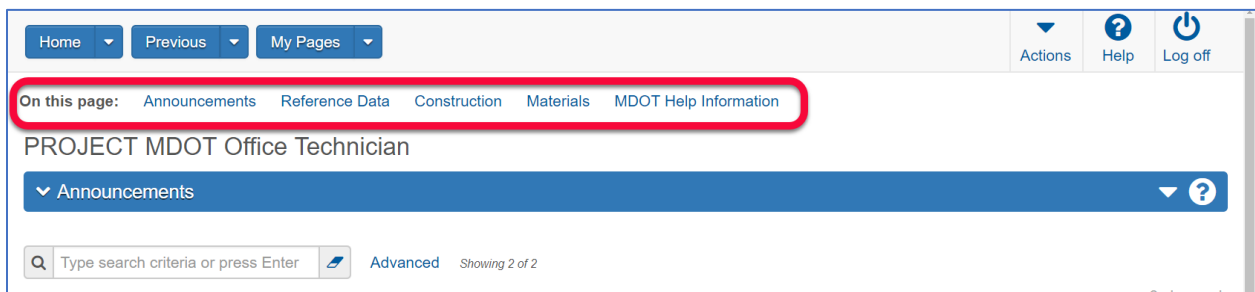
Page Title

Every page has a page title under the Quick Links Section. This lets you know what screen you are on. If you are on the Home Dashboard the page title displays your active role.
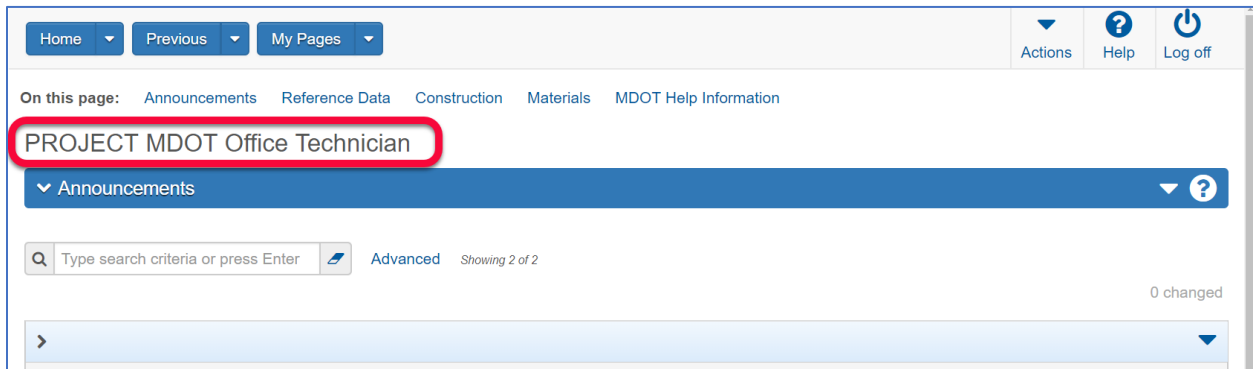
Components

Each page is made of individual components. Each component can have several of its own buttons and menus. They can be expanded or collapsed. They may have their own action menu and help button. They can also have search fields used to filter and sort records that are displayed within the component.

Changing User Roles

MILogin > AASHTOWare Project
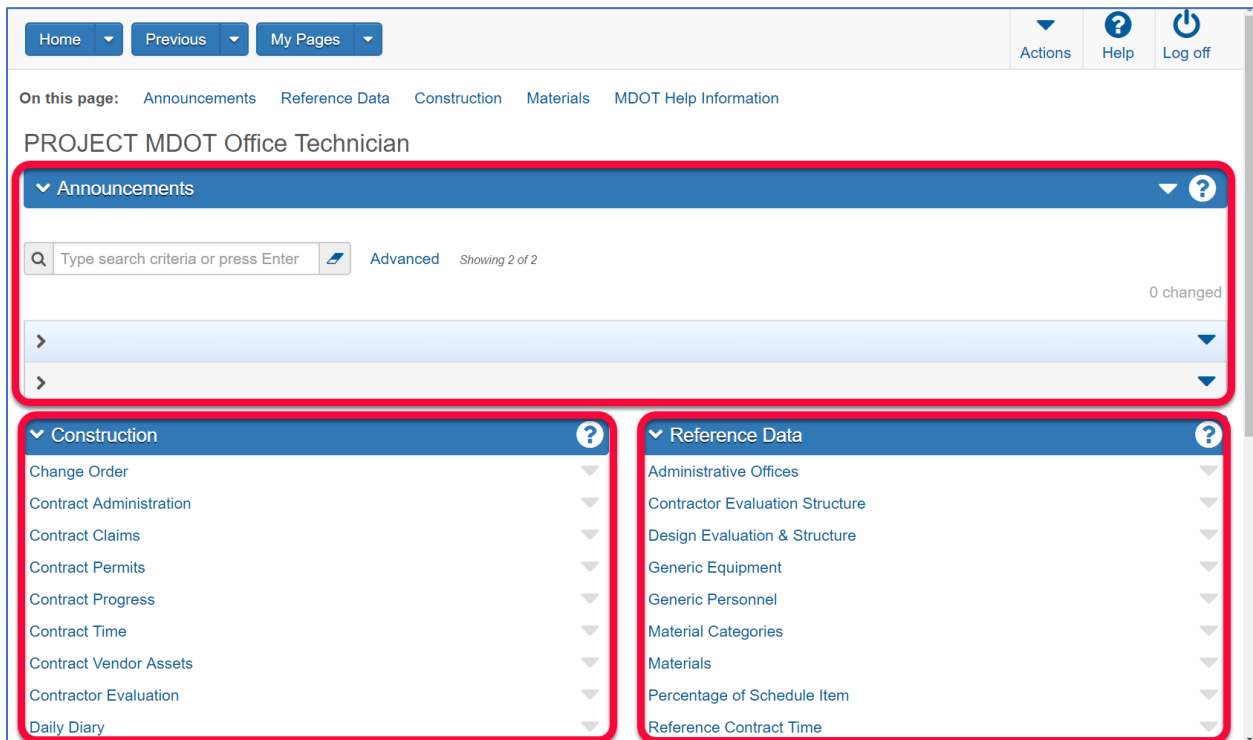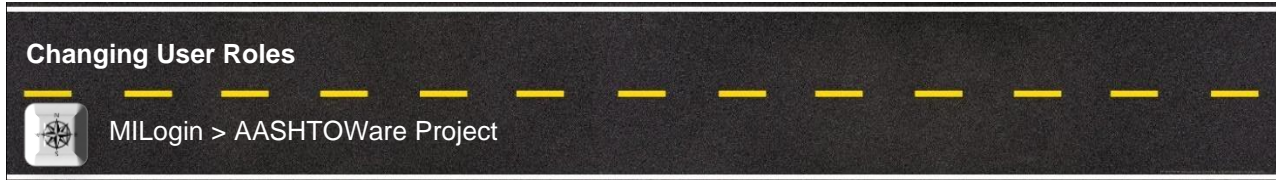
When multiple roles are assigned to a user, the user can only log on with one role at a time. If a role does not have access to a specific page or report, the user must change to a role that grants that access.

The Home menu lists all of the roles to which the user is currently assigned in blue and his active (current) role is displayed in black with a green check mark. The user does not need to log off to change his active role; he can do this at any time by clicking on another role in the Home menu.

1. Click the **Home button action menu** on any page to access the Home menu.
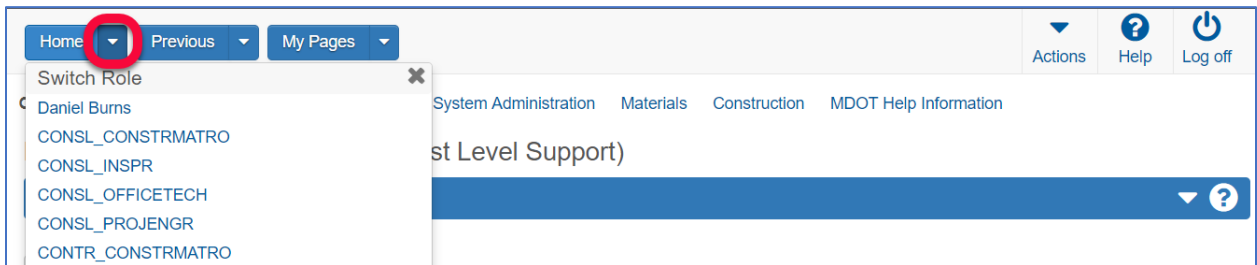
2. Select the role that you wish to use. The page will refresh, and you will be in your new role.

RECORDING PFC/CLOSEOUT INFORMATION IN CAS

CAS PFC Navigation

Desktop > Start > CAS > File > Open Contract List

Phase Financial Closeout (PFC) was recently modernized and added to the Phase Initiator (PI) application. The construction tab of PFC, used by field office and region staff to record information regarding the final estimate, was moved to the CAS application. CAS is now the application that records final estimate data from the field.

Loading CAS from the Software Center
  NOTE: If you already have CAS installed, skip this section and go to **Logging into CAS.**

1. **Click** the **Start** button in the bottom left corner of your desktop.

2. **Type Software** in the "Type here to search" field and **Select** the **Software Center** option.
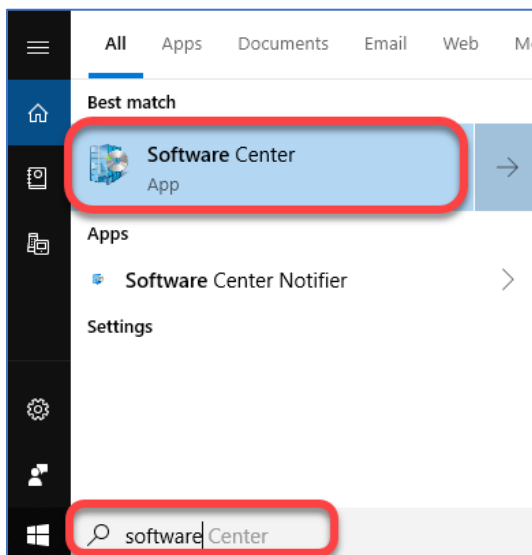
3. **Type CAS** in the search box on the top right of the screen.
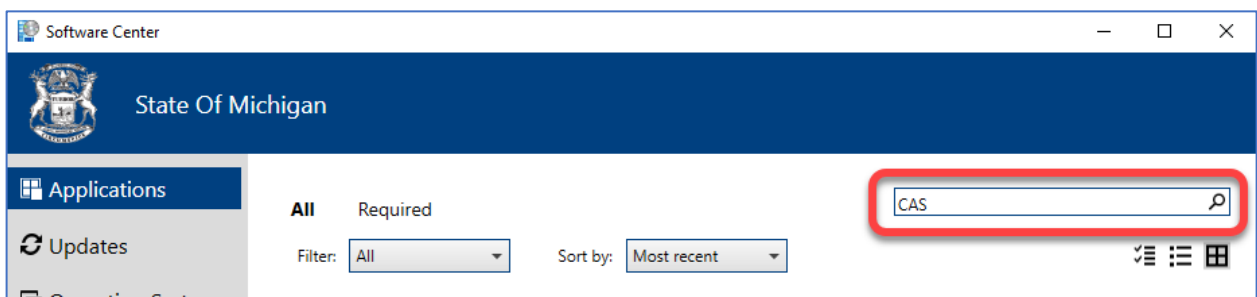
4. **Select CAS** from the options presented.
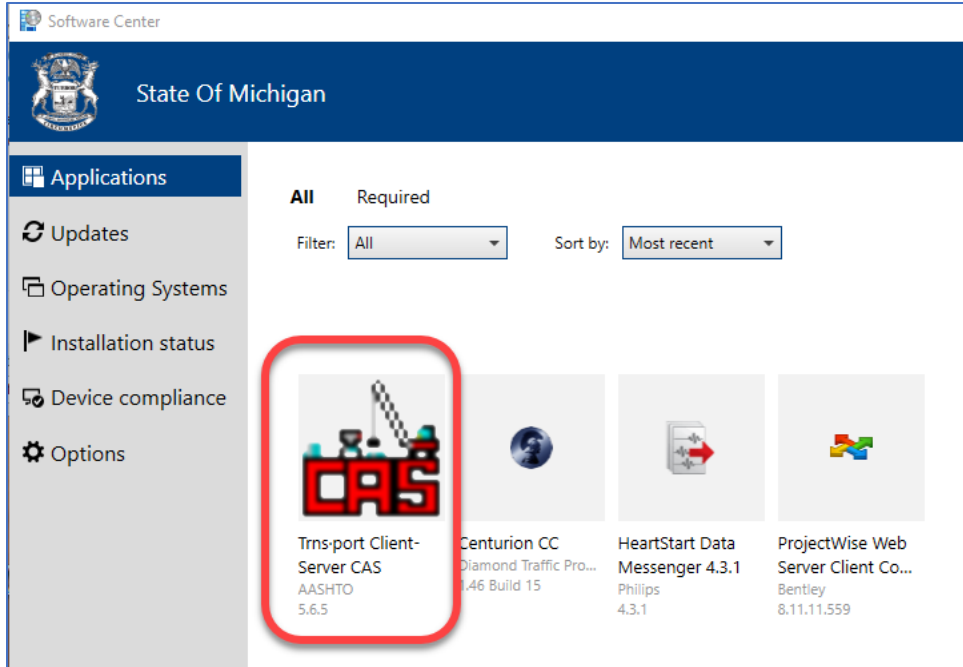
5. **Click** the **Install** button.
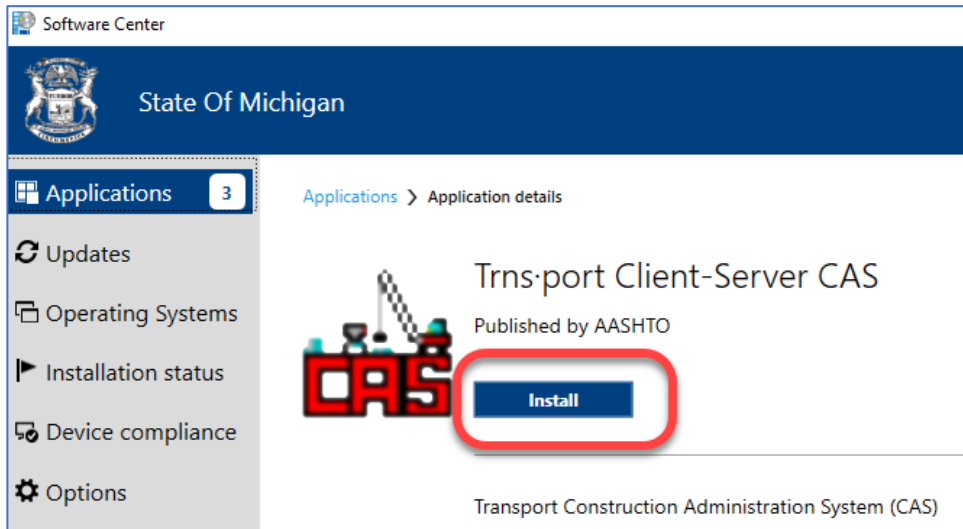
Logging into CAS

1. **Click** the **Start** button in the bottom left corner of your desktop.

2. **Type CAS** in the Type here to search field and **Select** the **CAS 5.6e** option.
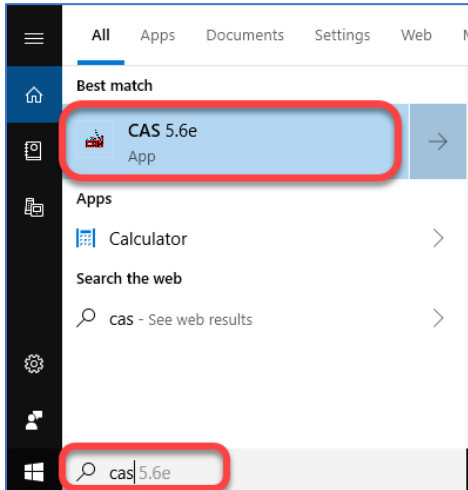
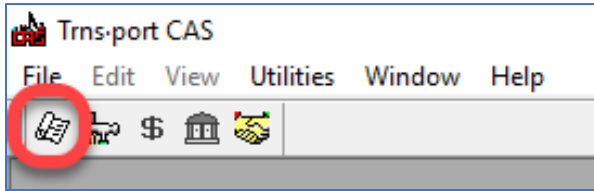3. **Enter** your **User ID** and **Password** and **Click OK**.
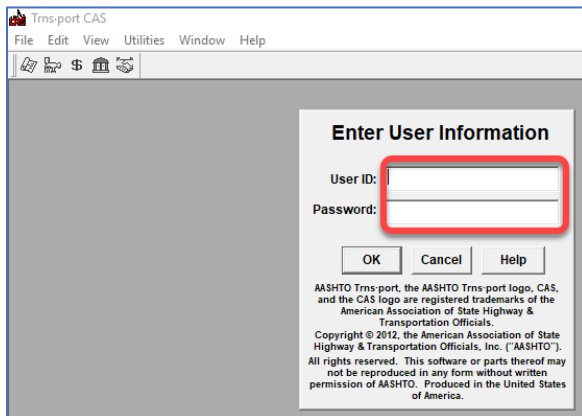
4. **Click** the **File** option on the menu bar and **Select Open Contract List** from the dropdown.
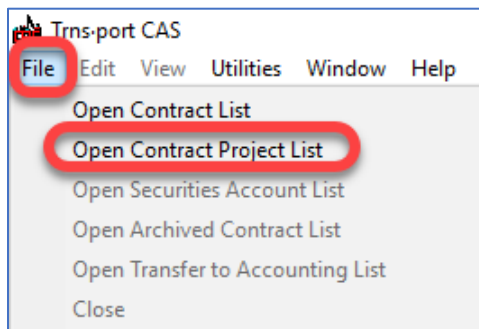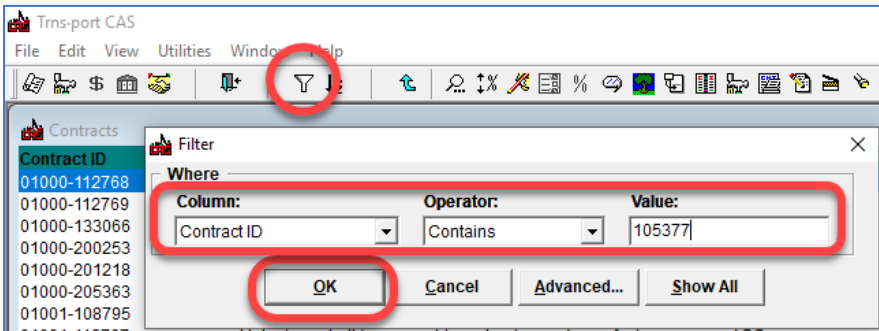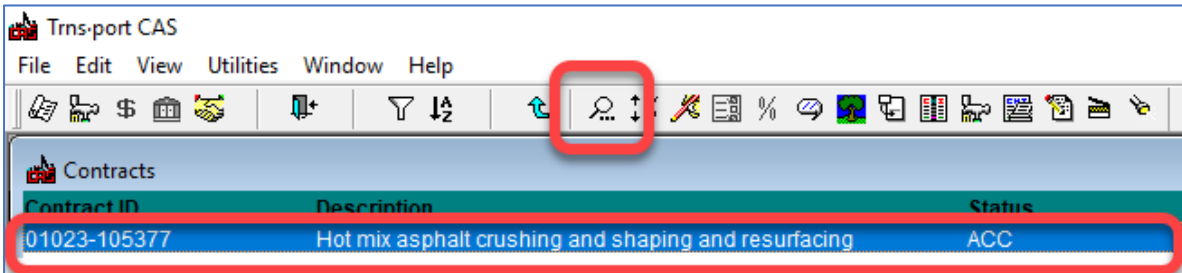

OR
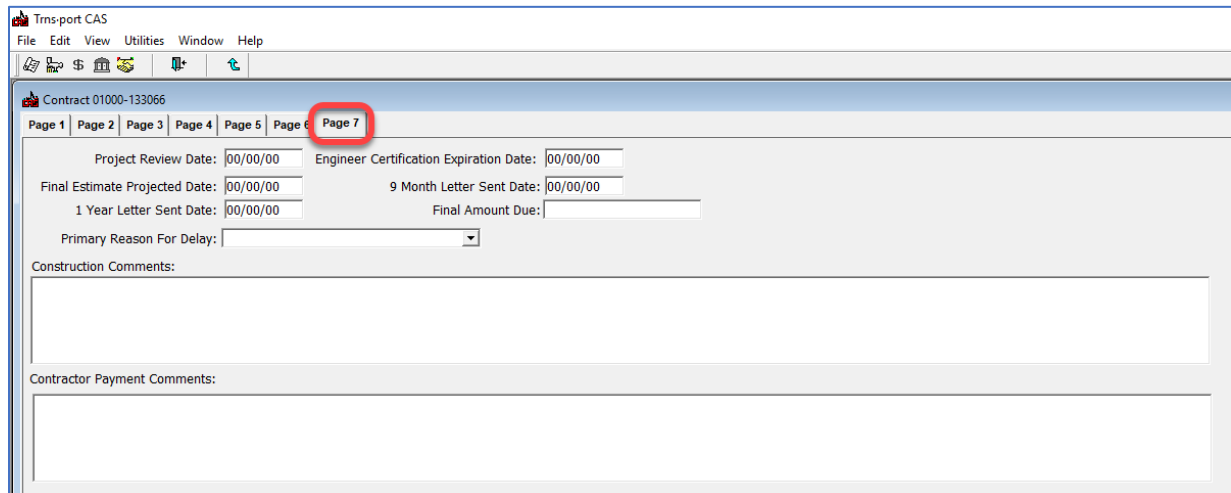
Click the **Rolled Paper** icon to display the contract list.

5. **Click** on the Filter icon and enter your search criteria to find the contract.

6. **Click** on a **contract** to select it and **Click** on the **Magnifying Glass** in the toolbar.

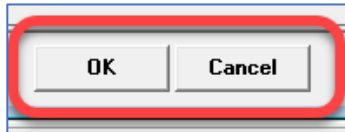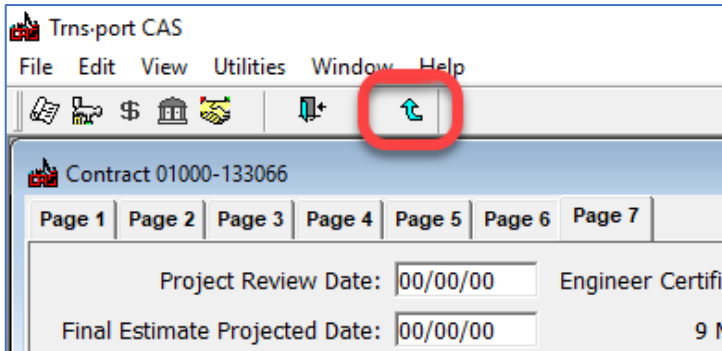7. **Click** the **Page 7** tab to display the PFC information.

8. **Click** the **Change** button at the bottom of the scree to enter data.
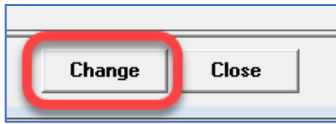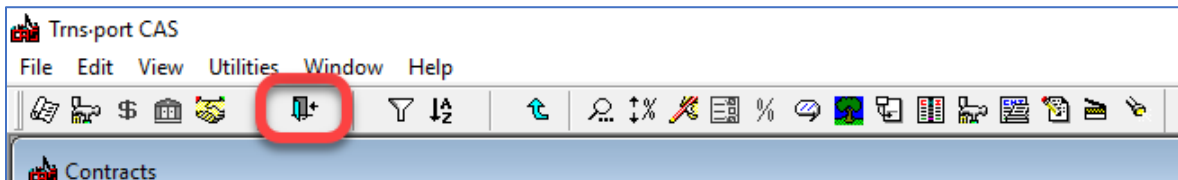

9. **Click** the **OK** button to save the data **OR Click** the **Cancel** button if you do not want to save your changes.
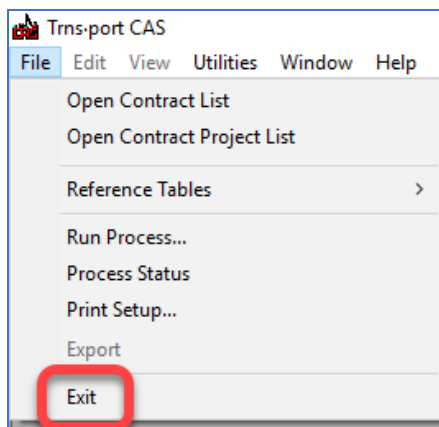

10. **Click** the **Up-Pointing Arrow** on the toolbar to return to the contract list.
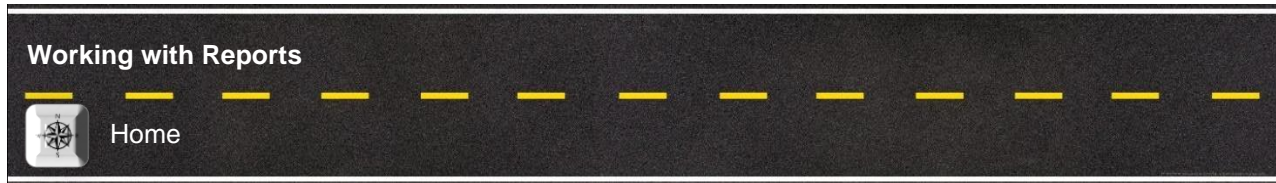

11. **Click** on the **Closing Door with Arrow** to close the contract list screen.

12. **Click File** in the toolbar and **Select Exit**.Working with Reports

# WORKING WITH REPORTS

Working with Reports

Home

You can generate reports from any page in the system by clicking the Actions menu on the Menu Bar and then clicking Generate Report. Reports are available to you through the security settings of your active role and by agency customizations to the application. As a result, some reports might not be available to you.

Generating A Report

1. **Select Generate Report** from the Actions menu on the Menu Bar. *The system takes you to the Generate Report component, which lists all the reports you can generate.*
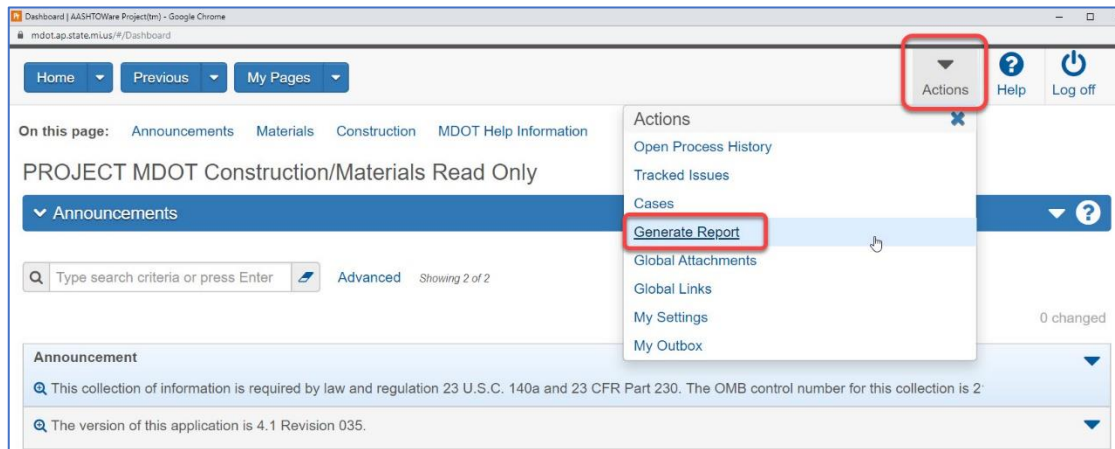
2. In the list of reports, Search for a report using a keyword in name of the report and **Click** the row for the **Report** you want to generate.
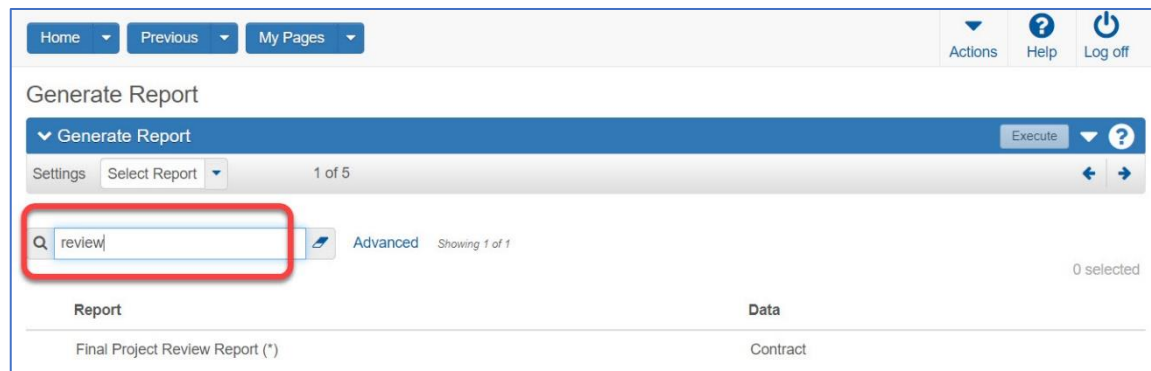
3. Select **Set Parameters** from the **Settings** menu on the component subheader. The system displays
    parameter options for the selected report. Select appropriate options within the parameters window.

4. By default, reports are generated in PDF format. If you want your report generated in HTML format,
    select **Output Options** from the **Settings** menu on the component subheader and **Click** the option
    labeled **Generate as HTML.**

5. **Click** the **Execute** button on the component header.

*The system generates the report and displays it in a new browser window. Use your browser's print
function to print the report if you need a printed copy.*

*(If you selected the option to generate the report in HTML format, the system displays a file Download
window. Click the Open button, and the system displays the HTML report in a new browser window.)*