Tab 1

Activate a Contract Process

External

(1) CSCT passes the contract to SiteManager

(2) CSCT notifies the RCT that the contract has been passed to SiteManager

Regional Construction Engineer (RCE)

Regional Construction Technician (RCT)

(5) RCT activates the Contract in SiteManager

(6) RCT will run the original Contract Item Summary Report & notify the RE that the contract is active in SiteManager

Regional Program Services Clerk (RPSC)

(3) Contract Notice to Proceed is issued by the RPSC upon direction of the RCE

(4) RPSC notifies the RCT that the Contract N2P has been issued

Deliverables

(a) Copy of the original Contract Item Summary Report sent to Resident Engineer (RE)

Regional Process Manual / Activate a Contract
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Process Steps	Available Step Aides	Key Activities	Points of Interest
1. Construction Section Computer Technician (CSCT) passes the contract to SiteManager		CSCT passes the contract to SiteManager	
2. Construction Section Computer Technician (CSCT) notifies the Regional Construction Technician (RCT) that the contract has been passed to SiteManager		The CSCT will email the RCT when the project has been loaded (passed) into SiteManager.	
3. Contract Notice to Proceed (N2P) is Issued by the Regional Program Services Clerk (RPSC) upon direction of the Regional Construction Engineer (RCE)		RCE will decide when it is appropriate to issue a N2P for a project (see the Project Notice to Proceed Process).	
4. Regional Program Services Clerk (RPSC) notifies the Regional Construction Technician (RCT) that the Notice to Proceed (N2P) has been issued		Headquarters will notify the RPSC when the contract has been delivered to the Construction Section	
5. The Regional Construction Technician (RCT) activates the contract in SiteManager	ACP1 ACP2 ACPa	The RCT activates the contract in SiteManager	It is important for the RCT to review Checklist ACPa before starting this process to ensure they are aware of possible issues they may encounter and items they need to consider
6. The Regional Construction Technician (RCT) will run the original Contract Item Summary Report & notify the Resident Engineer (RE) that the contract is active in SiteManager		The Contract Item Summary Report is run to establish a list of the Original Contract Items and quantities for the RE to use in setting up their project records. This report is emailed to the RE by the RCT	
Deliverables	**Available Step Aides**	**Key Activities**	**Points of Interest**
a. Copy of the original Contract Item Summary Report will be sent to the contract's assigned Resident Engineer (RE)		Copy of the original Contract Item Summary Report will be sent to the contract's assigned RE	

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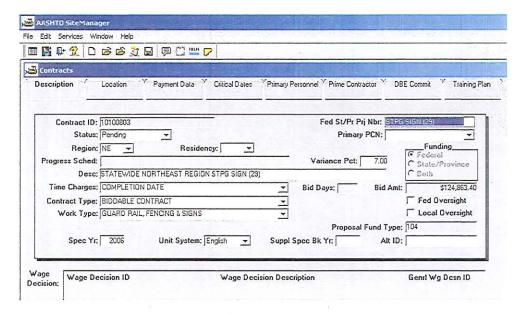**Program Development Division**
Construction Section

Instructional Sheet: ACP1 – How to Navigate to a Contract in SiteManager
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1. Log into SiteManager: User Name & Password
2. Navigate to Contracts: File → Main Panel → Contract Administration(+) → Contract Records(+) → Contracts
3. Select the contract from the contracts list: File → Open
4. Scroll through the list of contracts until you find the project you are looking to activate
5. Double click on the contract and the screen pictured below will open

6. See Instructional Sheet ACP2 Activate the Contract
7. Any issues encountered with SiteManager, including passwords & logins, should be reported to the Construction Section Computer Technician (CSCT) in Headquarters and Stephen Gilbert, with a cc to the appropriate Regional Construction Technician (RCT)

Vermont Agency of Transportation
Program Development Division
Construction Section

Instructional Sheet: ACP2 – How to Activate a Contract in SiteManager
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1. Go to the Prime Contractor tab
2. Click in the Prime Associates box
3. Go to File → New
4. Right click in the field created and add "Insurance" then repeat and add "Surety" (see Checklist ACPa – Item 1)
5. Go to the Primary Personnel tab
6. Right click → Search → add the Regional Construction Technician's name as the Project Manager (*If not already there*)
7. Right click → Search → add the Resident Engineer (if known) as the Project Engineer (see Checklist ACPa – Item 2)
8. Go back to the Description tab
9. Click in the Primary PCN field and add/choose the primary PCN number
10. Change the Variance Pct to "0"
11. Click in the Wage Decision area
12. Go to File → New
13. Right click in the field created and add "N/A – Not Applicable"
14. If there is Federal or Local oversight then toggle those boxes (see Checklist ACPa – Item 3)
15. Skip the Location tab
16. Go to the Payment Data tab
17. Make sure the Unlimited Escrow is NOT toggled
18. Make sure the Auto Liquidated Damage box IS toggled
19. Go to the Critical Dates tab
20. Click on the Notice to Proceed line
21. Enter the Notice to Proceed date into the Actual Occurrence Date field (see Checklist ACPa – Item 4)
22. Go back to the Description tab
23. Change the Status from Pending to Active
24. Any issues encountered with SiteManager, including passwords & logins, should be reported to the Construction Section Computer Technician (CSCT) in Headquarters and Stephen Gilbert, with a cc to the appropriate Regional Construction Technician (RCT)

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Check List: ACPa – Activate a Contract Possible Issues and Resolutions
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	Possible Issue	Resolutions	Points of Interest
1.	When the Regional Construction Technician (RCT) attempts to enter "Surety & Insurance" sometimes they will not appear on the pick list – the list will be blank.	• The RCT will need to contact the Construction Computer Technician in Construction Headquarters to have them add "Surety & Insurance" to the system so that they are available to be added to this screen.	
2.	The Regional Construction Engineer (RCE) has not assigned a Resident Engineer (RE) for a contract prior to the contract being activated.	• The Regional Construction Technician (RCT) will need to assign themselves to both the Project Manager & Project Engineer fields on the Project Personnel tab. • After the RE is assigned the RCT will need to go back into the system and update the Project Engineer field to include the RE's name.	• The RCT is sometimes assigned as the "Project Manager" on the Project Personnel tab by the Construction Section Computer Technician (CSCT) when he/she passes the project to SiteManager; so the RCT won't need to do so when activating the project.
3.	The Regional Construction Technician (RCT) will need to determine whether the contract has full Federal Highway Administration (FHWA) oversight prior to activating the contract.	• FHWA has full oversight when they have signed the cover of the contract plan set.	
4.	If the contract is a duration contract there will be additional steps to take if the Regional Construction Technician (RCT) decides to activate the contract in SiteManager prior to the issuance of the Notice to Proceed (N2P).	• The RCT will need to un-toggle "Required to Activate" where the N2P date would normally be entered as well as where the Original Completion Date would normally be entered. • Upon the issuance of the N2P, the RCT will need to go into SiteManager and enter the N2P date.	• The system will not allow the first estimate to be run until the Notice to Proceed date has been entered into SiteManager.