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Contract Setup: Reviewing Contract Data

Objective

Access Contract Data

Delete Contracts from the Work Tables

Verify Contract Line Items

Build Contracts

Reviewing Contract Data

After the Transportation Technical Aide or the Aide's backup in the Central Construction Unit downloads contract data from the Design Services System to the HiCAMS work tables, he or she does the following:

- ◆ Ensures that the contracts were downloaded from the Design Services System correctly.
- ◆ Deletes the downloaded contracts from the HiCAMS work tables that should not be loaded into the HiCAMS operational tables.
- ◆ Verifies that the contract information is accurate.
- ◆ Builds contracts for the verified information.

You complete each of these review processes by using the HiCAMS Review Contract Data function.

Accessing Contract Data

To access the downloaded data to check, delete, verify, and build into contracts, do the following:

- Step 1:** Log onto HiCAMS, using the instructions in the section "HiCAMS Getting Started."
- Step 2:** Select **Contract Setup** from the **Functions** menu and choose **Review Contract Data** from the sub-menu that appears.

The Review Contract Data window appears.

RPN	Primary Work Order Number	Letting Date	Contract Availability Date	Contract Description	Contract Bid Amt	Contract Status Description
1	8.1331101	01/20/98	03/02/98	GRADING, DRAINAGE, PAVING, SIGNALS & PAVEMENT MARKINGS	17,465,453.52	Pending Verificator
2	8.1672805	01/20/98	03/02/98	CLEARING AND GRUBBING.	336,306.40	Pending Verificator
3	8.1843501	01/20/98	03/02/98	WIDENING, GRADING, DRAINAGE, PAVING, RETAINING WALL & PAVEMENT MARKINGS.	7,603,418.63	Pending Verificator
4	8.1851003	01/20/98	03/02/98	GRADING, DRAINAGE, PAVING, PVMT MARKINGS & CULVERT EXT	32,399,044.63	Pending Verificator
5	8.1950602	01/20/98	03/02/98	WIDENING, GRADING, DRAINAGE, PAVING, & STRUCTURES.	11,807,491.86	Pending Verificator
7	8.2351201	01/20/98	03/02/98	GRADING, DRAINAGE, PAVING, PVT MARKINGS & CULVERTS.	480,424.27	Pending Verificator
9	8.2692001	01/20/98	03/02/98	GRADING, DRAINAGE, PAVING, PAVEMENT MARKINGS & STR.	1,449,543.94	Pending Verificator

For definitions of the fields in this window, click on the **What's This** Help button; then click on the field for which you wish to view a definition.



Tip: The information in the Review Contract Data window is sorted by RPN, in ascending order.

To change the sort order or type, click on the corresponding column title.

Step 3: Locate the contracts that you wish to view, delete, verify, or build, using the scroll bar, if necessary.

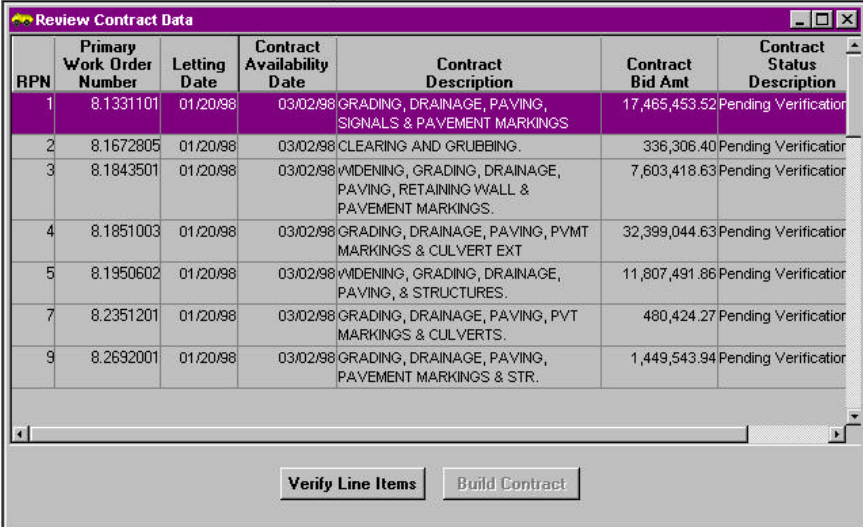
Deleting Contracts from the Work Tables

Sometimes, you need to delete contracts from the HiCAMS work tables that should not be loaded into the HiCAMS operational tables.

This should be done for contracts that were included in the letting but were not awarded, due to the fact that all of the bids were too high, the contract was awarded as a cluster contract, or other reasons.

Step 1: Open the Review Contract Data window, using the instructions in the section “Accessing Contract Data,” above.

The Review Contract Data window appears.



RPN	Primary Work Order Number	Letting Date	Contract Availability Date	Contract Description	Contract Bid Amt	Contract Status Description
1	8.1331101	01/20/98	03/02/98	GRADING, DRAINAGE, PAVING, SIGNALS & PAVEMENT MARKINGS	17,465,453.52	Pending Verification
2	8.1672805	01/20/98	03/02/98	CLEARING AND GRUBBING.	336,306.40	Pending Verification
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7	8.2351201	01/20/98	03/02/98	GRADING, DRAINAGE, PAVING, PVT MARKINGS & CULVERTS.	480,424.27	Pending Verification
9	8.2692001	01/20/98	03/02/98	GRADING, DRAINAGE, PAVING, PAVEMENT MARKINGS & STR.	1,449,543.94	Pending Verification

For definitions of the fields in this window, click on the **What's This** Help button; then click on the field for which you wish to view a definition.



Tip: When you first open the Review Contract Data window, the information is sorted by RPN number, in ascending order.

To change the sort order or type, click on the corresponding column title.

Step 2: Select the RPN that you wish to delete from the HiCAMS work tables.

Step 3: Click on the **Delete** button on the toolbar.



A confirmation box appears, asking you to confirm whether or not you want to delete the RPN from the system.

Step 4: Click **Yes**.

The RPN disappears from the window and is deleted from the system.

Verifying Contract Line Items

After contracts have been downloaded into the HiCAMS work tables and the necessary RPNs have been deleted, you check the remaining contracts to see if the information has been downloaded correctly and to verify the line items for each RPN.

In HiCAMS, this verification consists of checking the contract bid amount and matching each of the line items that have been downloaded from the Design Services System with their corresponding Master Pay items in the HiCAMS system.

The HiCAMS system performs the match between line items and Master Pay items automatically, when contracts are downloaded during the Enter Letting Information procedure. However, due to variations in data entry, the system may not find an exact match between these items, making it necessary to associate them manually.

All of the line items associated with a contract must be verified, either automatically or manually, before the system changes the status of the contract from “Pending Verification” to “Verified.” Verification must be completed before the contracts can be loaded into the HiCAMS operational tables, where they are subsequently viewed and updated.

To review contract data, do the following:

- Step 1:** Open the Review Contract Data window, using the instructions in the section “Accessing Contract Data,” above.

The contracts that have been downloaded from the Design Services System to the HiCAMS work tables appear in the window.

- Step 2:** Select an RPN for which you wish to verify line item information (one with a status of *Pending Verification*).

- Step 3:** Check the Contract Bid Amt field to see if the amount matches the one in the manual Award Letter. Do one of the following:
- ◆ If the amount matches, proceed to the next step.
 - ◆ If the amount does not match, contact Design Services and ask them to update the bid amount. Continue with all of the steps in this procedure for a different contract, if you wish. Then, at a later time, download the contract with the mismatched bid amount again, after Design Services has updated the bid amount, and repeat the steps in this section.

- Step 4:** Click on the **Verify Line Items** button at the bottom of the window.

Note: This button is available only if the RPN you select has a status of "Pending Verification."

The Verify Line Items window appears, displaying the line items for the selected contract.

Contract: C104818 Letting Date: 1/20/98
 Bid Amount: \$11,807,491.06
 Description: WIDENING, GRADING, DRAINAGE, PAVING, STRUCTURES.

Filter By Status: No Match

Verify	Line Item	Match Code	UOM	Sect Nbr	Desc Nbr	Contract Spec Prov	Description
	5	NO	M3	225	19	NO	SUPPLEMENTARY CLEARING & GRUBBING
	6	NO	M3	5000	29	NO	UNDERCUT EXCAVATION
	9	NO	M3	240	45	NO	INCIDENTAL STONE BASE
	10	NO	M2	5000	60	NO	ASPHALT CEMENT FOR PLANT MIX
	11	NO	M2	5000	64	NO	ASPHALT CONCRETE BASE COURSE, TYPE H
	14	NO	M	310	89	NO	METAL FUNNELS
	15	NO	M	200	198	NO	300MM FUNNEL DRAIN PIPE
	17	NO	EA	5000	117	NO	SHOULDER BERM GUTTER

Buttons: Lookup Master Pay Item, Rows Modified From Original Value, Rows With Original Value

For definitions of the fields in this window, click on the **What's This** Help button; then click on the field for which you wish to view a definition.



Tip: The information in the Verify Line Items window is sorted by Line Item number, in ascending order.

To change the sort order or type, click on the corresponding column title.

The Filter By Status list box at the top right corner of the window causes the system to retrieve and display line items for the following verification statuses:

- ◆ **No Match** - Displays a list of line items for which the system did *not* find a match with corresponding Master Pay items.
- ◆ **Possible Match** - Displays a list of line items for which the system *did* find a match with corresponding Master Pay items, *except for the item descriptions*, which differ in some way.
- ◆ **Verified** - Displays a list of line items for which the system *did* find an *exact match* between the line items and corresponding Master Pay items.
- ◆ **All** - Displays a list of all of the line items for the contract, regardless of whether or not the system found any matches with Master Pay items.

Step 5: Select **No Match** from the Filter By Status list box.

The system displays the corresponding line items in the window.

Tip: You can begin this process by reviewing the **Possible Match** items, first, rather than starting with the **No Match** items. However, it is recommended that you start with **No Match** line items because they present a more serious set of database discrepancies.

Step 6: Select one of the line items.

Step 7: Click on the **Lookup Master Pay Item** button.

The Master Pay Item Lookup window appears.

Contract: C104818 Letting Date: 1/20/98 Bid Amount: \$11,807,491.86
 Spec Yr: 1995 Metric English Code: Metric
 Description: WIDENING, GRADING, DRAINAGE, PAVING, STRUCTURES.

Available Query Criteria Selected Query Criteria

Drag and Drop Rows To Adjust Query

Seq Nbr	Description Nbr	Sect Nbr	Description	UOM Code

OK Cancel

For definitions of the fields in this window, click on the **What's This** Help button; then click on the field for which you wish to view a definition.



The window is divided into four sections:

- ◆ **Top** - This section displays specific details about the line item that you have selected to match with a Master Pay item.
- ◆ **Middle** - This section displays the query criteria you use to find the Master Pay item that matches the selected line item. Explanations for the two boxes on the left and right side of this section are as follows:

Selected Query Criteria

The area where you place query criteria that the system uses to search for and display Master Pay items. When you first open the window, *all* of the query criteria associated with the selected line item appears in this box.

Available Query Criteria

Area of the window where you place available query criteria that you are *not* using to search for and display Master Pay items. When you first open the window, this area is blank.

- ◆ **Bottom** - This section displays the Master Pay items that the system searches for and displays, based on query items that appear in the Selected Query Criteria box.

Tip: When you open the window for line items with a Match Code of "Maybe," a suggested Master Pay item match appears in this section of the Master Pay Item Lookup window.

- Step 8:** Click on the query criteria rows, one by one, in the Selected Query Criteria box on the right side and drag them to the Available Query Criteria box on the left side, until you see the Master Pay item that matches the selected line item.

Each time you move a row from the right side to the left, the list of Master Pay items from which to select a match expands, according to the query criteria that remains on the right side.

Tip: If you suspect that a particular type of query criteria is responsible for the mismatch between the line item and corresponding Master Pay item, drag that criteria row to the Available Query Criteria box on the **left**, to eliminate that variable from your search for the matching item.

- Step 9:** Based on what you see in the Master Pay item list, do one of the following:

- ◆ If you see the Master Pay item that matches the selected line item, continue with **Step 10**.
- ◆ If you see a Master Pay item that you cannot match to the line item because a discrepancy exists that necessitates a change in either the Design Services System or in HiCAMS, then click the **Cancel** button and continue with **Step 11**, below.

At some point, you must arrange to make the necessary change to the HiCAMS system or contact Design Services about making the change to their system, to eliminate the discrepancy. Then, download and re-verify the line item again, using the instructions in the section “Entering Letting Information” and in this section.

Step 10: Click on the matching Master Pay item in the list at the bottom of the window; then click **OK**.

You return to the Verify Line Items window. The word “Verified” appears in the corresponding Verify field.

Step 11: Click on the **Save** button on the toolbar to save the verification.



The line item disappears from the Verify Line Items window. You can now find this line item by selecting “Verified” from the Filter By Status drop-down list box.

Tip: Line items that have been verified but not yet saved to the database appear in the window with a yellow background. After you save or exit the window without saving changes, the background of those items appears gray again, indicating that the information in the window is identical to the information in the database.

Step 12: Select and verify the next line item in the contract, repeating the steps above, starting from **Step X(6)**. Continue this process until you have verified all of the items in the **No Match** lookup and all of the line items disappear from the list in the window.

Step 13: After you finish verifying the **No Match** items, repeat the process for the **Possible Match** line items (or vice versa), starting again from **Step X(5)**.

Step 14: After you have verified the last item for the selected RPN, close the Verify Line Items window.

You return to the Review Contract Data window.

The Contract Status Description for the RPN changes from “Pending Verification” to “Verified,” and a message box appears, asking if you want to save the information that you just verified.

Step 15: Click **Yes**.

Note: *You cannot build a contract that has not been saved to the database, first.*

Tip: *RPNs that have been verified but not yet saved to the database appear in the window with a yellow background. After you save or exit the window without saving changes, the background of those RPNs appears gray again, indicating that the information in the window is identical to the information in the database.*

Step 16: Repeat this procedure for all of the RPNs in the Review Contract Data window, starting with **Step 1** or **2**, until all the RPNs in the window have a Contract Status Description of “Verified.”

After the RPNs have been verified and saved, they are ready to be built into contracts (loaded into the HiCAMS operational tables).

Building Contracts

At any time, you can build contracts for any of the RPNs in the review Contract Data window, provided that they have a status of “Verified.”

This moves the contract data to the operational data tables in HiCAMS.

To build a contract, do the following:

Step 1: Open the Review Contract Data window, using the instructions in the section “Accessing Contract Data,” above.

Step 2: Select one or more verified RPNs from the list.

Tip: You can select any or all RPNs that have a status of “Verified,” using your **Shift** key to select consecutive rows or your **Ctrl** key to select intermittent rows.

Insert a screenshot here of selected, verified items

Step 3: Click on the **Build Contract** button at the bottom of the window.

Note: The Build Contract button is unavailable if one or more of the RPNs you selected does **not** have a Contract Status Description of “Verified.”

The system loads the selected information into the HiCAMS operational tables, where the new contracts can be accessed and updated.

A message box appears at the end of the procedure, letting you know that the contracts have been built successfully.

Exercises

- Step 1:** Log onto HiCAMS.
- Step 2:** Open the Review Contract Data window.
- Step 3:** Delete one of the contracts in the window.
- Step 4:** Verify/match all of the line items for one of the contracts in the window.
- Step 5:** Save your work.
- Step 6:** Build the contract that you just verified.