

ILLINOIS CONSTRUCTION RECORDS SYSTEM

ICORS Reference & Training Manual for Microsoft Office 2010
District 8
February 9, 2015



State of Illinois
Illinois Department of Transportation



Illinois Department
of Transportation

The Illinois Construction Records System (ICORS)
For
Microsoft Office - Access 2010
Training Manual

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Preface

The Illinois Construction Records System (ICORS) was designed to reduce the burden of project recordkeeping. ICORS is the preferred method for construction documentation and is the Intellectual property of IDOT. The department has made a major investment in this system to improve documentation, payment processing and other reporting applications. ICORS is designed to conform to documentation guidelines in IDOT's Construction Manual. As such, the policies discussed in the documentation Section of the Construction Manual apply to the records stored in ICORS.

Use of ICORS will continue to be expanded to improve communications and reporting efficiencies.

Document Control and Revision History

The District 8 ICORS Training Manual is regularly reviewed for adequacy and updated by the ICORS Support Technician as necessary. The approval process for changes to this manual is conducted in accordance with the procedure outlined below:

Interim changes are made to reflect ICORS Program Updates and to revise or correct content. Revisions are reviewed by the District Project Implementation Support Supervisor, District Project Implementation Engineer and the Regional Engineer.

Archive versions of this manual are available to examine in the Policy & Research Center, Room 320 of the Hanley Building.

Manual Electronic Format

Portable Document Format (PDF) has been selected as the primary distribution format, and the official version of the manual is available on the IDOT Web site. District ICORS users are responsible for making sure that they are using the most current version of the ICORS program and Training Manual.

Revision History

<u>Revision Date</u>	<u>Description</u>	<u>Approval</u>
February 16, 2015	Previous versions of this manual were generated - maintained by the District Contract Support section. Previous versions were never submitted to the Policy & Research Center. The Manual was Updated to reflect and support the current version of ICORS. It has been submitted to the Policy & Research Center.	PI Support Supervisor District P.I. Engineer Regional Engineer

Introduction

District ICORS Support Contact: _____

Email Address: _____

Phone Number: _____

Contact your local IDOT District office for ICORS Support Personnel contact information.

This training is designed to be done at your own pace. Please follow the steps in the Manual and ask the Instructor questions if you don't understand something or it doesn't work as stated. There are copies of preview screens included at various portions of the manual. Please compare your screen to these examples and discuss with the instructor(s) if they do not match. This manual is yours to keep for future reference.

How to Use This Manual

The ICORS Training Manual is designed to assist and guide you through the process of using the ICORS database. The Training Manual, while best suited for classroom instruction, can be used as an independent tutorial and as a reference guide. A Second example, found under Appendix A, serves as the ICORS Course test and is issued as in class homework. The second example must be completed and submitted for ICORS class credit. While this manual is setup for classroom instruction, the first example can be used as an independent tutorial and reference guide.

Certain typographical conventions, which may identify required actions on the part of the user, have been used throughout the manual. The instructions throughout this manual will gradually become less detailed, encouraging class participants to build on previous lessons.

Typographical convention	What it represents
• Statements preceded with a bullet	Steps in a process
Menu Selections	Select the option from the menu.
<i>Data</i>	User will enter into a field or which will appear in a field.
Key in Box	Keys that you press.
Boxed Key + Boxed Key	Keys that you press together (while holding down the first key, press the second key; then release both).

Note - Some the screen shots in this manual may not be up to date with the current version.

Although there are no prerequisites for this class, it is strongly recommended that Documentation class is attended prior to the ICORS class.

District 8 ICORS Use and Security

The security levels built into the ICORS system allow varying levels of user access, which in the field constitute anywhere from “Read-Only” capabilities, to “Data Entry” only, to “Assistant”, and finally “Resident”. There are higher administrative levels of security that are intended for IDOT Support Personnel only. Each one of the security levels allows broader access to the user than the one before it, with the “Resident” level being the highest level available for field use which basically allows full access to create pay estimates and authorizations.

The log-in security system built-in to the ICORS database is intended to not only protect the Department from unauthorized use, it is equally intended to protect the aforementioned ICORS user and also the Resident Engineer/Technician assigned to that contract as well. One may or may not be aware that each entry is tracked to who created the various entries and when they were made. Perhaps more importantly, in regards to the project diary, if anyone should happen to change the diary for any reason, the system would track who created the original entry, what the original entry stated, and when it was created, as well as if it was changed, what it was changed to, who made the change, and when. Of course, this is effective only if the user name/password combination is unique to that individual. If everyone is sharing the same log-in on an ICORS computer, then this all-important aspect of this functionality is rendered useless. Keep in mind that the person ultimately responsible for the accuracy, security, and integrity of this ICORS data is the Resident. Again, this system is designed to protect all parties involved in the process, and all ICORS data entry could be traced back to the log-in.

In order to protect both the Department AND individual ICORS users, Departmental Order 8-2 (Appendix B) mandates unique user accounts. These user Accounts are to be restricted by password control, and affects ALL ICORS users (including State, Local Agency and Consultant personnel). ICORS is an IDOT Information Technology resource, and as such, this resource “must be protected from accidental or unauthorized access, use, disclosure, modification, or destruction by employees, contractors, or any individual whether on state or non-state provided equipment” (first paragraph, page 1). Section 4.C. of this document outlines the security policy as it pertains to passwords, hardware and data security, computer viruses, as well as data backups.

Username/ password combinations are never to be shared by anyone, and if the user feels their password has been compromised, they should change it immediately. The Resident should routinely delete users who are no longer involved in the contracts assigned on that particular ICORS unit, and can easily add new users by entering a user name, and then entering and verifying a designated password, and selecting the appropriate security group. That new user should immediately log-in using the password assigned to him/her and immediately change it, for not even Residents need to know the passwords of their delegates.

Therefore all ICORS User accounts (User Names) must be documented by the District’s ICORS Support personnel and all Local Agency-Consultant personnel are required to sign and submit IDOT Form D8 PI0201 “ICORS Use & IDOT Policy Agreement” for each District 8 ICORS contract. This documents who has permission to use the ICORS program as well as serve as a contact list for ICORS program updates. Once District Support personnel receive the completed form, they will contact the individual to setup ICORS for the new contract. Support personnel will make sure the resident is documented, ICORS program is up to date and that the basic Contract Information/email addresses have been entered correctly. Without this documentation, non-IDOT users are not approved to use the ICOR program.



ICORS Use & IDOT Policy Agreement

I, the undersigned, acknowledge and agree to the following:

- I have been granted access to Illinois Department of Transportation (Department) information technology (IT) resources for the sole purpose of utilizing these resources to conduct the daily business of and promote efficiency within the Department;
- In addition to general access to Department IT resources I have been or may be granted access to additional applications or databases for the same sole purpose of conducting Department business;
- I understand that access to these resources includes the ability to view and print confidential information and that I am responsible for maintaining the confidentiality of this information;
- I acknowledge that the Department shall protect and dispose of personal data under the Personal Information Protection Act (815 ILCS 530/30);
- I acknowledge that ICORS is the Intellectual property of IDOT and as such I will comply with IDOT Departmental Order 8-2 regarding the use of ICORS Passwords, Hardware, Data Security, Computer Viruses as well as data backups.
- I have received a copy of Departmental Order 8-2., will read and comply with it;
- I understand that failure to comply with this agreement and Departmental Order 8-2 will be deemed a violation of policy and my access to IDOT technology resources and ICORS may be restricted;
- All IDOT Department policies concerning the use of ICORS will be strictly followed, including those policies specified in the latest version of the "ICORS and Acceptable Documentation" Memorandum issued by the District;
- I will be responsible for the accuracy and integrity of the ICORS database for their assigned contracts;
- The ICORS database will not be Modified, Copied or Distributed to other computers;
- The ICORS database will be used only for the contract(s) for which written authorization is granted by the District;
- Certification or permission to use the ICORS software in no way grants or implies any future rights to its application or use on future contracts.

ICORS Users: Please complete the information below.	- District Use Only -
Name - <input type="text"/>	I hereby authorize this individual to use the ICORS database on the below mentioned contract. I will provide all ICORS training and user support for listed individual. I have provided this individual with copies of: <ol style="list-style-type: none"> 1. ICORS use on State Projects Memorandum; 2. External User ICORS Use & ICORS and Acceptable Documentation Memorandum; 3. Current IDOT Supported Computing Platforms; 4. District SharePoint Site User Guides; 5. Signed copy of this agreement.
External ID - <input type="text"/>	
Email - <input type="text"/>	
Phone - <input type="text"/>	
Mobile Phone - <input type="text"/>	
Supervisor's Name - <input type="text"/>	
Company - <input type="text"/>	
Address - <input type="text"/>	
City, State Zip - <input type="text"/>	
Contract# - <input type="text"/>	
I have read and understand the above agreement -	ICORS User Name - <input type="text"/>
Signature - <input type="text"/>	Security Level - <input type="text"/>
Request Date - <input type="text"/>	ICORS Coordinator - <input type="text"/>
	Signature - <input type="text"/>
	Date Approved - <input type="text"/>

Note - All New ICORS Users must attend a District ICORS Training Class, have their user ID and External ID listed in the District ICORS user registry to have the approval to use and or access ICORS. Existing ICORS users may attend an ICORS course at any time as a refresher.

Printed 2/5/2015

D8 P10201 (02/03/15)

Example 1 - ICORS User & IDOT Policy Agreement

Please familiarize yourself with these requirements and take all necessary precautions noted. It is imperative that proper usage of the username/ password log-in be maintained in order to prohibit fraud and/or incrimination on behalf of, or affecting, the ICORS user.

The ICORS Database (Access Version)

Welcome to the Illinois Construction Records System Database (ICORS). The ICORS Database is designed to automate the field site record keeping process. Almost everything which used to be documented manually at the field site can now be documented within the database.

You will find the ICORS database easy to use and understand. The database can produce Authorizations and Pay Estimates. It can maintain material allowances and materials documentation. It can find out the Quantity Book quickly and easily and it can produce final and intermittent reports.

Before you can use the ICORS database effectively, however, you should understand the basic structure of a database. In this lesson, you will learn what a database is and how a database is organized. You will get a tour of the ICORS Database and you will learn about some special keys and their functions within the database.

A *database* is a collection of related information. The information is called *data*. A telephone book is a database. The primary requirements for a database are that the information is related and that it is organized. The telephone book lists the names and phone numbers for a particular community. The community is the relationship between each listing. The listings are then organized alphabetically. Organizing the data makes the database useful.

When you organize and manage a database on a computer, you need some sort of database management system. A database management system (DBMS) is a computer program which organizes and manages the data you input. The ICORS Database is written in the DBMS Microsoft Access 2010.

Data tables provide a way to exclusively categorize small groups of information. In the ICORS Database, for example, the list of prime and subcontractors from a contract would be in one data table while the list of Authorizations would be in another. Categorizing data into small units like this lets the database management system handle the data more efficiently.

The database management system can also use the information from more than one data table in operations and procedures. Searching multiple concise data tables for needed information is more efficient than putting every needed piece of information into one large data table. This concept is the foundation of *relational databases*.

In a relational database, data tables are linked together, or related to each other. Relationships between data tables are established through common fields. Relational databases let you organize data in discrete and manageable units while providing you with the ability to combine information which is logically related.

The ICORS Database is a relational database with several related data tables. Because of the ability to link one data table to another, the data tables in ICORS can be kept relatively simple. The database management system can access the appropriate table or tables to gather or manipulate information.

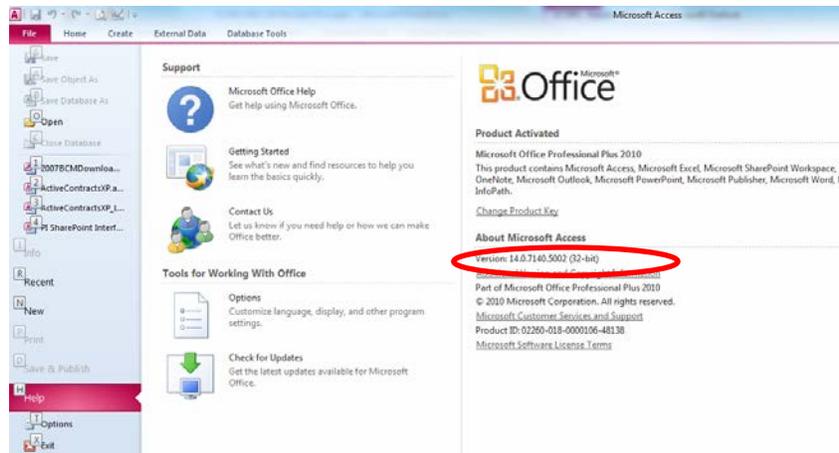
ICORS - Current Version

ICORS 2014 Version 1.0.6 is the current version of ICORS with a revision date of August 13, 2014. To check to see which version of ICORS you have open and log in, Click on File then, About. The About ICORS dialog box will open as shown in Example 2.



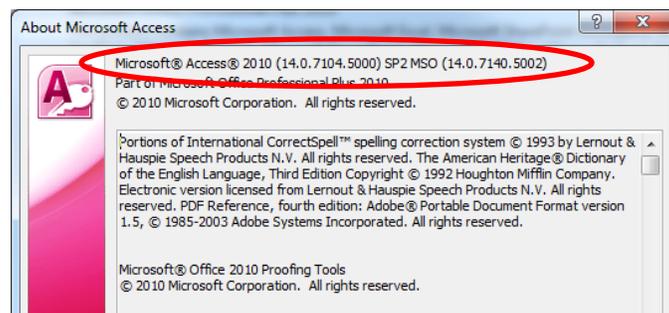
Example 2 - About ICORS

ICORS 2014 Version 1.0.6 was designed for DBMS Microsoft Access 2010 with Service Pack 2 installed. To verify that your version of Access is compatible with ICORS: Open Access, Click on File then Help. Now Click on “Additional Version and Copyright Information” under About Microsoft Access as shown in Example 3.



Example 3 - Access Additional Version and Copyright Information

The About Microsoft Access dialog will open up. The top line will indicate the software version and Service Pack (SP) installed (Example 4).



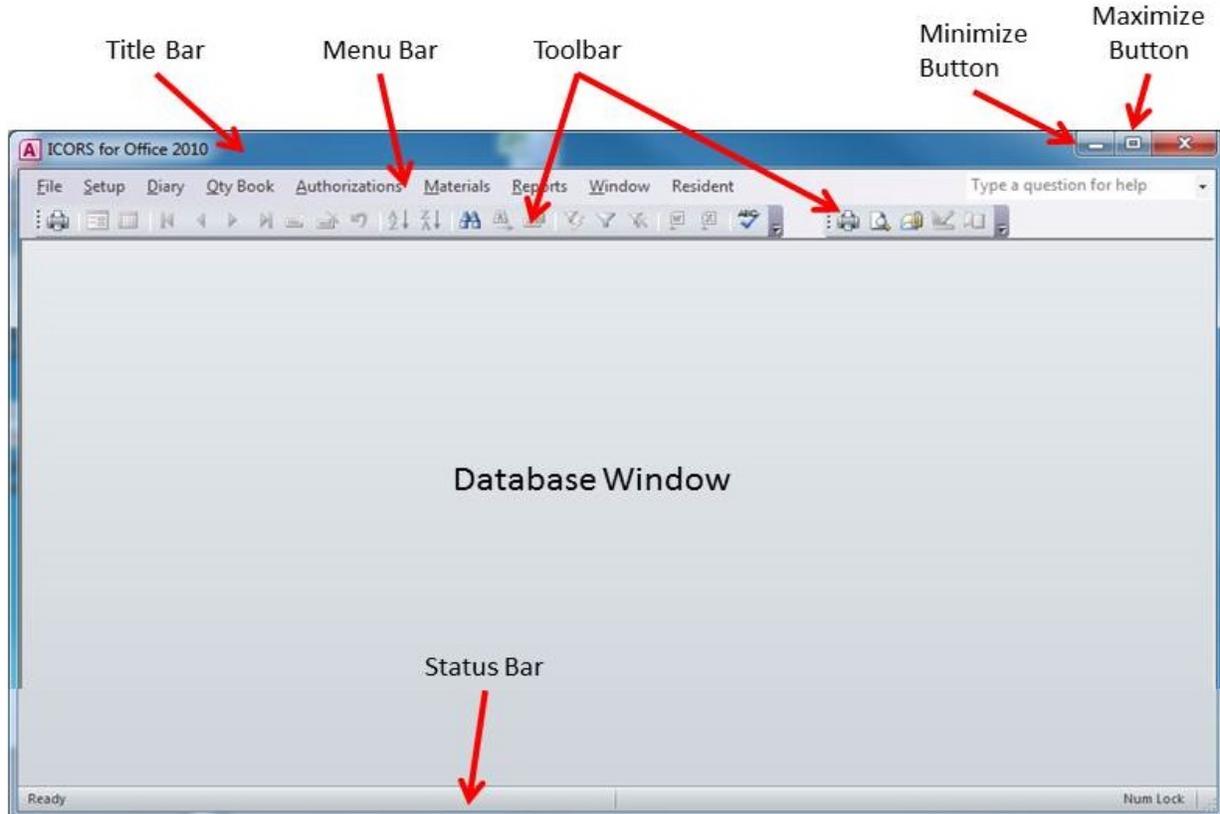
Example 4 - About Microsoft Access

The Access Environment

ICORS Title Bar

The title bar is at the top of the window. It contains the following items:

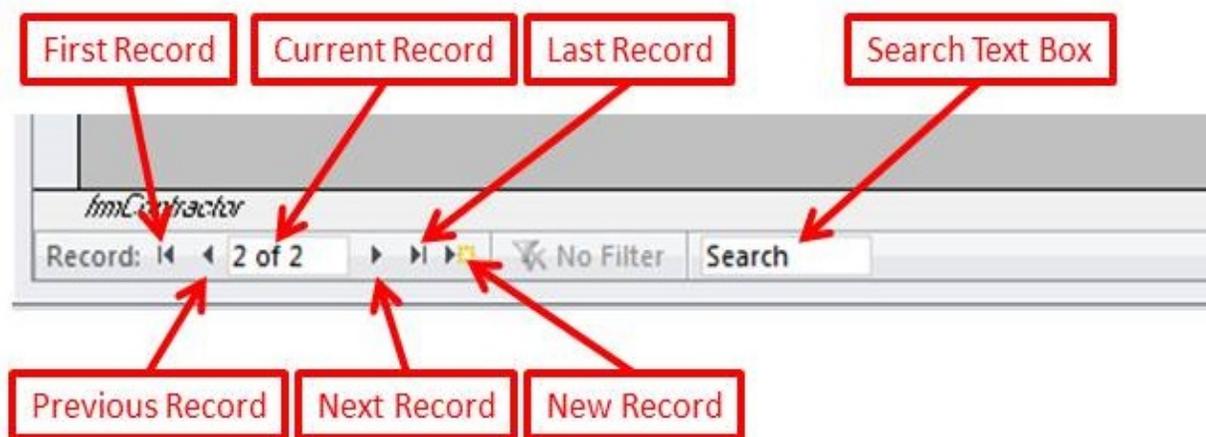
- Control-menu icon: A key icon on the far right side of the title bar. It provides a list of commands used to change the size and position of the application window or close it.
- Program title: ICORS for Office 2010 – name of the database is displayed to the right of the key icon.
- Minimize button  – the dash on the right side of the title bar, it shrinks the application window to a button on the taskbar, entitled ICORS for Office 2010.
- Maximize/Restore button  – the double box to the right of the Minimize button. It enlarges the application window to fill all available screen space or it restores a minimized application.
- Close button  – the on the far right side of the title bar. It closes both the open database and the Access application.
- The menu bar is located immediately below the title bar. It displays the names of the drop-down menus for the current application.
- The toolbar is located below the menu bar. The toolbar includes buttons with icons (small pictures representing options) that you can use to perform actions quickly.
- The status bar is the area at the bottom of the window. It displays messages that enable you to use the menus more efficiently and that guide you in performing tasks.



Example 5 - Access Screen layout

Record Navigation Bar

The record Navigation bar helps you navigate though a record set. You can navigate to the Previous, Next, First, or Last record in a recordset by using the controls on the Record Navigation Bar. You can also use the Search text box to quickly navigate to a record containing specific data and use the Filtered button to remove a filter that is applied to a field in a table.



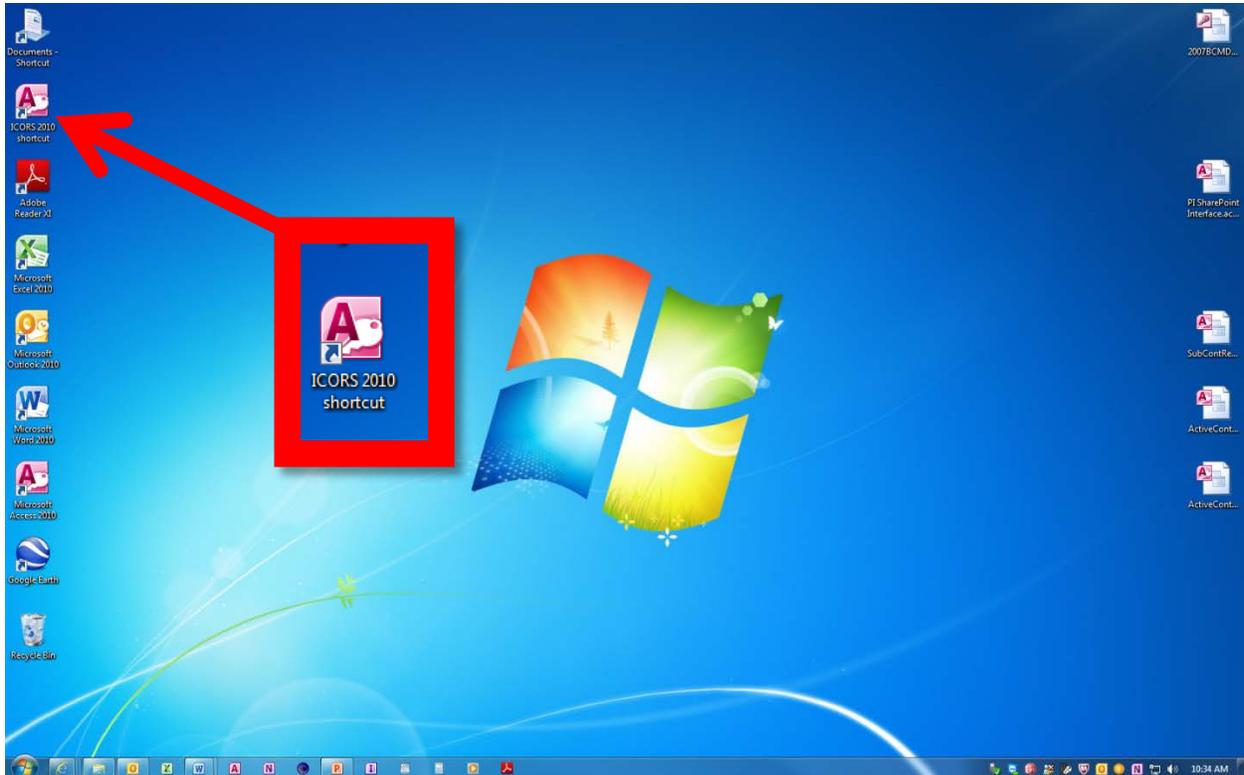
Example 6 - Record navigation Bar

Form Navigation Buttons	Description
Next Record	To move to the next record.
Previous Record	To move to the previous record.
Last Record	To move to the last record in the table.
First Record	To move to the first record in the table.
New Record	To enter a new record in the database.
Delete Record	To delete a record in the database
Sort Ascending	Sorts the selected items in order from the beginning of the alphabet, the lowest number, or the earliest date, using the column that contains the insertion point.
Sort Descending	Sorts the selected items in order from the end of the alphabet, the highest number, or the latest date, using the column that contains the insertion point.
Find	Searches for specified text, formatting, symbols, comments, footnotes, or endnotes in the active document.
Filter by Selection	Filters records by selected data. To filter by selection, select a field or part of a field in datasheet or form and then click Filter by Selection.
Advanced Filter/Sort	Displays the Advanced Filter/Sort window so you can create a filter to apply to the datasheet or form.
Remove Filter/Sort	Removes a filter in the active datasheet or form , if one is currently applied, and displays the most current records.

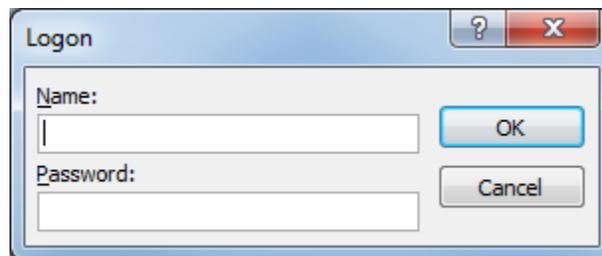
Lesson 1: Starting a New Contract

Opening the ICORS Program

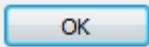
- Find the ICORS 2010 shortcut icon on your desktop and click on it.



Example 7 - ICORS Startup



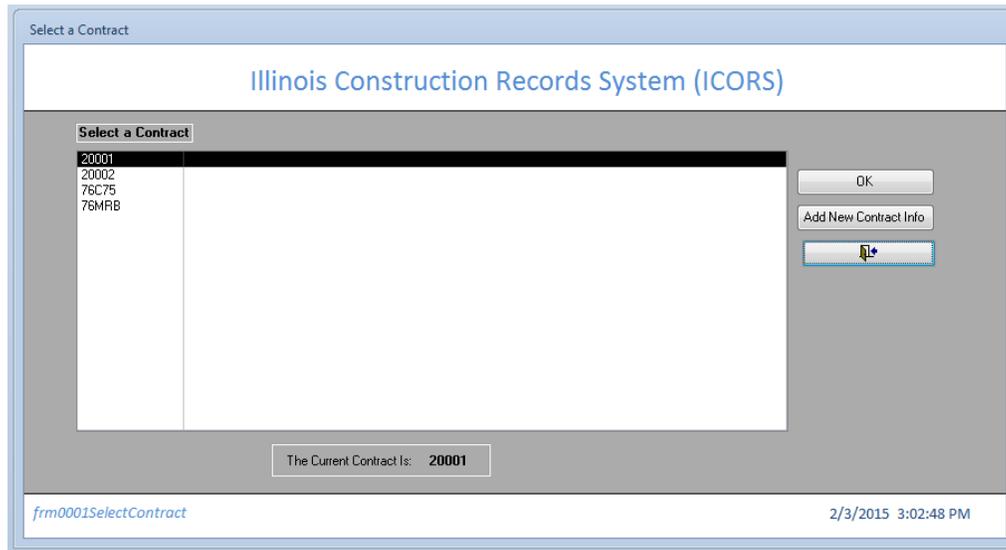
Example 8 – ICORS Logon

- Enter your ICORS Logon Name* and Password*.
- Click on 

*Note – The Generic Logon “Resi” has been deleted. Generic Logon’s must not be used as they are against IDOT policy.

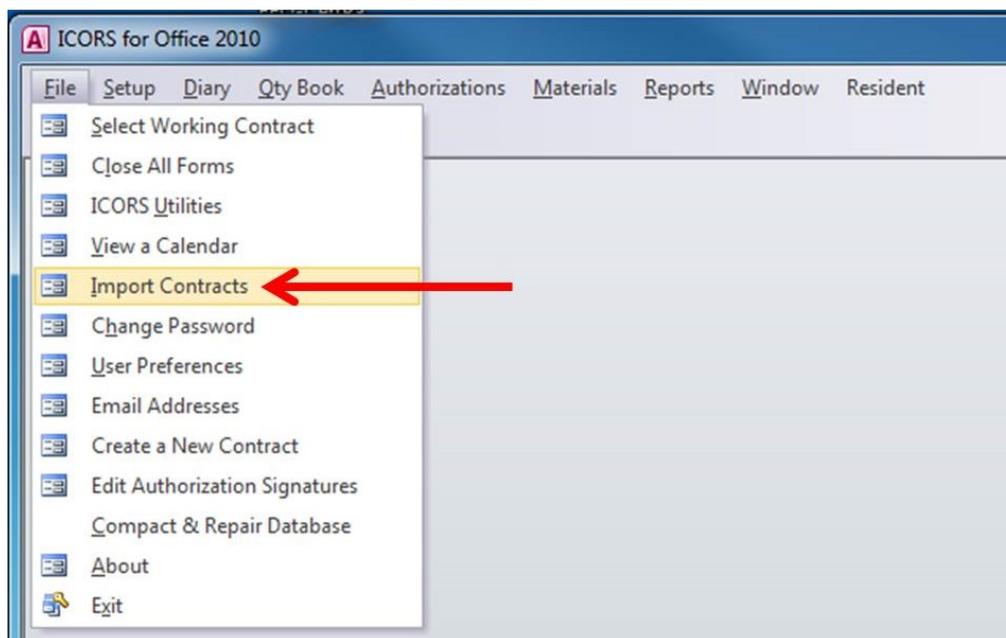
Import Contract

When you open ICORS, your screen will display the following dialog box:



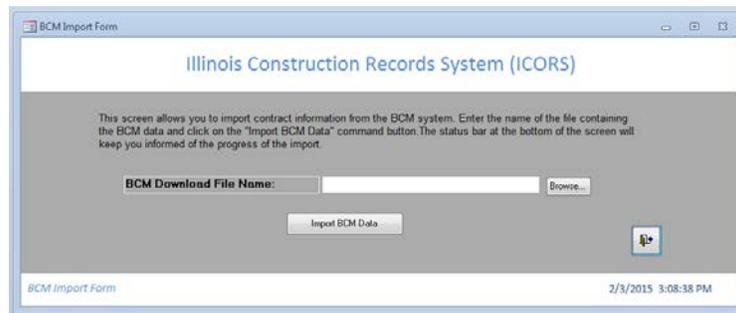
Example 9 – ICORS Contract Selection Screen

- At this time, you will select a contract by double-clicking on the contract number or by clicking once to select the contract number and then clicking on 
- Select Contract Number 20001.
- Go to the File tab at the top of the ICORS screen and select Import Contracts.



Example 10 - ICORS Import Contracts

- In the ICORS Data Import Screen, click on  and select Contract 20001.



Example 11 - Data Import Screen

Click on  to import the contract into ICORS.

- After ICORS states that the “Data Import was Completed Successfully”, Click on the Close Form button.



Example 12- ICORS Data Import Completed Message

Selecting a Working Contract

- Go back to the File Tab and Choose “Select Working Contract”. You will see the following screen.



Example 13 – ICORS Contract Selection Screen

- At this time, select Contract Number 20001. Then Click on the  Button..
- ICORS will give you the following message:
- Click on the **Ok** Button to close the notice.
- Each time you open/start ICORS, you will need to select the contract that you want to work on by either “Double-Clicking” on the contract number or by “Clicking” once to select the contract number and then clicking the “OK” button  to close this screen.



Example 14 - New Contract Warning

Contract Email Address Setup

Email addresses are Contract Specific so Always Setup the Emails for your Contract First!

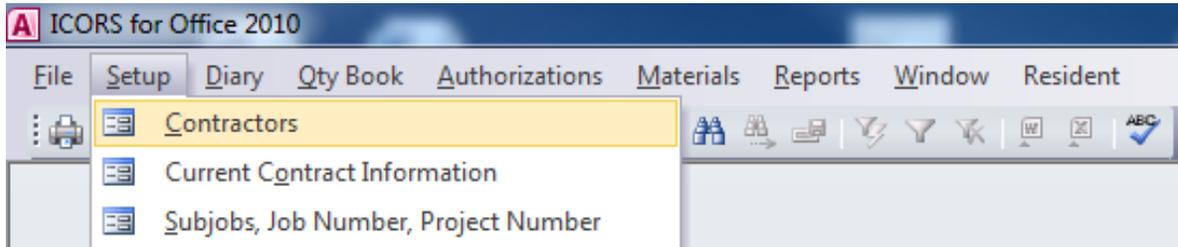
- Go back to the File Tab and Choose “Email Addresses”. You will see the following screen.

Example 15 - Email Address Information Screen

- For the 1st Entry, enter the following email address:
 - Enter your Districts Weekly Report Email Address (See District Email List)
 - Click the check box for “Send Them a Weekly Report”
- For the Second Entry, enter the following email address:
 - IDOT Residents Enter:
 - D8.PayEstimates@partner2010.illinois.gov
 - Click the check box for “Send them a Pay Estimate”
 - Local Agencies and Consultants on IDOT Contracts:
 - NOTE – If you are a Local Agency
 - Enter the following email address: Carrie.Blow@Illinois.gov
 - Click the check box for “Send them a Pay Estimate”
 - NOTE – If you are a Consultant working for a Local Agency:
 - Send the Pay Estimate to the Local Agency Engineer
 - Enter the Local Agency Engineer’s Email address
 - Click the check box for “Send them a Pay Estimate”
 - Enter the Contractors Email address(s)
 - Click both check boxes to send the Weekly Report and the Pay Estimate
 - Include the SFE if so Directed
- For Additional Information – Refer to the “Weekly-Pay Estimate Cheat Sheet”

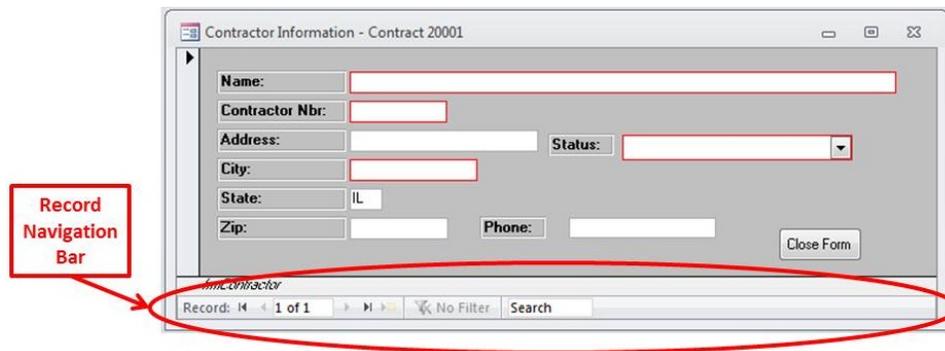
Entering Contractor Information

- From the ICORS Menu; Select **Setup** and then Select **Contractors**
- Or use the keyboard short cuts: **Alt + S + C**



Example 16 - Adding Contractor Information

➡ The Contractors data table is displayed in form view when it is opened from the menu. ⬅



Example 17 - Contractor Input Form

- Enter the following information:

Name: *Pavers, Inc.*

Contractor Nbr: *12672*

Address: *134 Pine Street*

Status: *Prime Contractor*

City: *Springfield*

State: *IL*

Zip: *62707-1234*

Phone: *217/555-9876*

The Contractor's Number is on the Award List.

You can call Contract Support or District 8's EEO-DBE Labor Section.

STATUS CHOICES:

- Prime Contractor
- Subcontractor
- Joint Venture
- Member of Joint Venture

You have now entered the first contractor record.

To enter Additional Contractor Information Records:

- “Click” on the New Record  button located in the Record Navigation Bar.
- This will lock in the information entered and allow you to enter the next record.
- Enter the following:
 - *Stripers, Inc.*
 - 98765
 - 12 Elm St.
 - *Subcontractor*
 - *Springfield, IL 62719*
 - 217/555-6789

The List of “Approved Subcontractors is located on the IDOT Webpage under the “Doing Business”. A hyperlink to this list is on the D8Implementation SharePoint site.

A List of Prime and Subcontractors is located on the D8Implementation site:

[District 8 Prime and Subcontractor List](#)

Contact the District 8 EEO-Labor Relations Section if you need additional assistance or you are waiting for a subcontractor approval.

NOTE -

DO NOT include Subcontractors until you receive the Subcontractor Approval Notice form BC-260A from the EEO-Labor Relations Section!

Per IDOT Specifications, Subcontractors are not to work until they are approved and you have the signed BC-260A form.

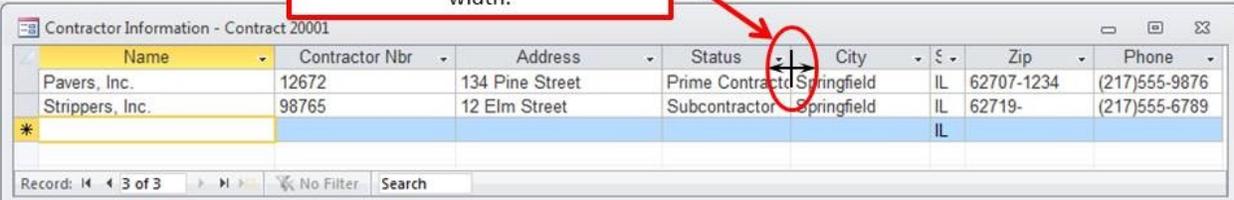
Datasheet View

Now you have two contractor records. To view them together, press the Datasheet View  button on the toolbar. Maximize the Contractor Information window.

	Form View – to view records in the form (view 1 record at a time)
	DataSheet View – to view records in datasheet form (view the data table)

While in Datasheet View, you may notice that you cannot see all of the data in a particular column. To change the column width in your table:

This is the cursor that you will see when you are adjusting column width.



Name	Contractor Nbr	Address	Status	City	Zip	Phone
Pavers, Inc.	12672	134 Pine Street	Prime Contract	Springfield	IL 62707-1234	(217)555-9876
Stripers, Inc.	98765	12 Elm Street	Subcontractor	Springfield	IL 62719-	(217)555-6789
*					IL	

Example 18 - Column Width Adjusting

- Place the mouse pointer on the boundary to the right of the column heading, and drag the divider to the right (to expand the column) or to the left (to shrink the column).

- Place the mouse pointer on the boundary to the right of a column heading and double-click the mouse button. The column width is calculated to accommodate the longest entry in the column.

To go back to form view; press the Form View  button on the toolbar.

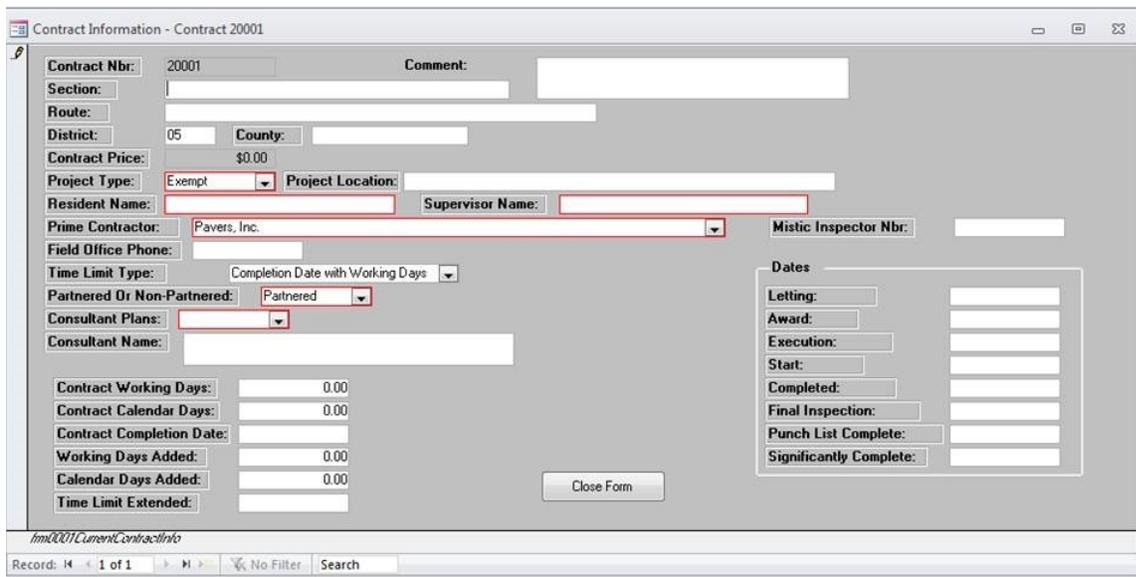
Look over the various fields. Several of them are bordered red. When a field is red, the ICORS Database *requires* that data be entered into this field before you can save the record to the database.

Looking over the second record, you realize that you entered *Springfield* when you should have entered *Strongfield*. Double click the “City” field. “Springfield” should be highlighted.

- Type *Strongfield*. Springfield will be automatically overwritten.
 - To close this data table, click on the  in the top right-hand corner of the form “Contractor Information – Contract 20001”. When you close the record, any modifications are automatically saved.
-  You have the option of leaving a table open instead of Closing it. This will allow you to open and work on a different table. You can switch between tables if needed. 

Entering Contract Information

- Select **Setup** from the menu bar.
- Select **Current Contract Information** from the Setup menu
- The Contract Information form will open.



Contract Information - Contract 20001

Contract Nbr: 20001 Comment: [Redacted]

Section: [Redacted]

Route: [Redacted]

District: 05 County: [Redacted]

Contract Price: \$0.00

Project Type: Exempt Project Location: [Redacted]

Resident Name: [Redacted] Supervisor Name: [Redacted]

Prime Contractor: Pavers, Inc. Mystic Inspector Nbr: [Redacted]

Field Office Phone: [Redacted]

Time Limit Type: Completion Date with Working Days

Partnered Or Non-Partnered: Partnered

Consultant Plans: [Redacted]

Consultant Name: [Redacted]

Contract Working Days: 0.00

Contract Calendar Days: 0.00

Contract Completion Date: [Redacted]

Working Days Added: 0.00

Calendar Days Added: 0.00

Time Limit Extended: [Redacted]

Dates

Letting: [Redacted]

Award: [Redacted]

Execution: [Redacted]

Start: [Redacted]

Completed: [Redacted]

Final Inspection: [Redacted]

Punch List Complete: [Redacted]

Significantly Complete: [Redacted]

Close Form

Record: 1 of 1 No Filter Search

Example 19 - Contract Information Form

- Enter the following information:

➤ You can move from field to field by using the **Tab** key or your mouse pointer ➤

NOTE –

WE STRONGLY DISCOURAGE USING THE ENTER KEY TO NAVIGATE THROUGH FORMS AND TABLES. USE THE TAB KEY TO ENSURE ACCURACY!

- Contract Nbr: Field automatically filled in.
- Section: *101-67*
- Route: *FA 10*
- District: *8*
- County: *Marshall*
- Project Type: Choose *Exempt*

Example 20 - Project Type Drop Down Box

- There is a drop-down list that you can access by clicking on the down arrow.

This should be noted at Pre-Construction Meeting or Check with SFE.

- *Exempt* means Exempt from FHWA direct oversight – majority of contracts
- *Non-Exempt* means that the contract will have FHWA direct oversight – this is rare and you would be notified by the district for this type of contract.
- Local Agencies usually exempt.
- See Construction Memorandum Number 4
- Fed oversight Starts at \$10 Million,
 - Authorizations over \$250,000 require Fed approval

- Project Location: *IL Route 18 from Magnolia to Henry.*
- Resident Name: *Enter your name*
- Supervisor Name: *Enter the name of the IDOT Construction Field Engineer for Project.*
- Prime Contractor: Choose *Pavers, Inc.* from the Drop-down box.
- Mystic Inspector Nbr: *Leave Blank for this Exercise.* (Optional field)
- Field Office Phone: *Enter your phone number.*
- Time Limit Type: *Working Days*

Time Limit Type DropDown List:

- Working Days
- Completion Date
- Completion Date with Working Days
- Completion Date Plus Working Days
- Calendar Days – Consecutive

- Partnered or Non-Partnered: *Partnered.*
- Consultant Plans: *Consultant*
- Consultant Name: *Joe Consulting, Inc.*
- Contract Working Days: *15*
- Letting Date: *11-16-2010*
- Award Date: *12-12-2010*
- Execution Date: *2-24-2011*
- Start Date: *3-14-2011*

**Partnered or Non-Partnered:
If Partnering is in the Contract:**

- Must have meetings during job – usually larger jobs.
- Includes:
 - IDOT
 - Prime Contractor
 - Subcontractor
 - Utilities
 - County +/- or City Officials

- Close the record by selecting **File, Close All Forms**, or use the Close Form button. Access will automatically save the record when you close the form.

Entering Subjob Information

- Select **Setup** from the menu bar by clicking on it with your mouse or press **Alt + S**
- Select **Subjobs, Job Number, Project Number** by clicking with your mouse or press **S**
 - Enter information for Subjob A:
 - Job Number: *C-95-100-97*, **Tab**
 - Project Number: *FTYH-9876*

Subjob	Job Nbr	Project Nbr
A	C-95-100-97	FTYH-9876

Close Form

Record: 1 of 1 | No Filter | Search

Example 21 – Sub Jobs Screen

- Click on the **Close Form** button

Entering Evidence of Inspection Information

This information is used in your Daily Quantities (DQ's) records.

Always refer to the Project Procedures Guide (PPG) and the Manual for Materials Inspection (MMI) for more information

- Select **Setup** from the menu bar
- Select **Evidence of Inspection**

↻ This information can be modified to suit you. You can add records or modify the existing ones. ↻

Example 22 - Evidence of Inspection Form

Let's assume that most of your material is inspected by Inspector Number 100.

- Click inside the brackets of "IL () OK Stamp"
- Delete the parentheses by using either your **Delete** key or your **← Backspace** key on the keyboard.
- Type *100*
- Now we want to add another record. Add a new record by clicking on the New Record  Button
- Type *IL 60 OK Stamp*
- To reorganize the records in alphabetical order, click the Sort Ascending  button on your toolbar. The item you added will be moved just above "IL 100 OK Stamp".

- Close the file by pressing the **X** in the top right hand corner of the “Evidence of Inspection” dialog box.

Entering Scale Information

- Click **Setup** on the menu bar
- Click on **Scale Information**
- Enter Decal Number *10101*, **Tab**
- Enter Decal Date *12-1-2009*, **Tab**
- Enter Location *Paver's Plant* (If you wish, you can enter remarks.)

Every Pound & Ton Item must have scale information.

Hyperlink to the [Current Large Scale List](#) maintained by the Illinois Department of Agriculture.

This Hyperlink is also saved to several locations on the D8Implementation Site.

Now you can tag any pay items that are associated with that scale.

Scale Information - Contract 20001

Decal Number: Decal Date: Close Form

Expiration Date:

Location:

Remarks:

Warn me if this scale is expired

Pay Items	
Pay Item	
M4080400	INCIDENTAL BIT SURF
MX406685	BCSC SUPER "D" CLI T2
*	

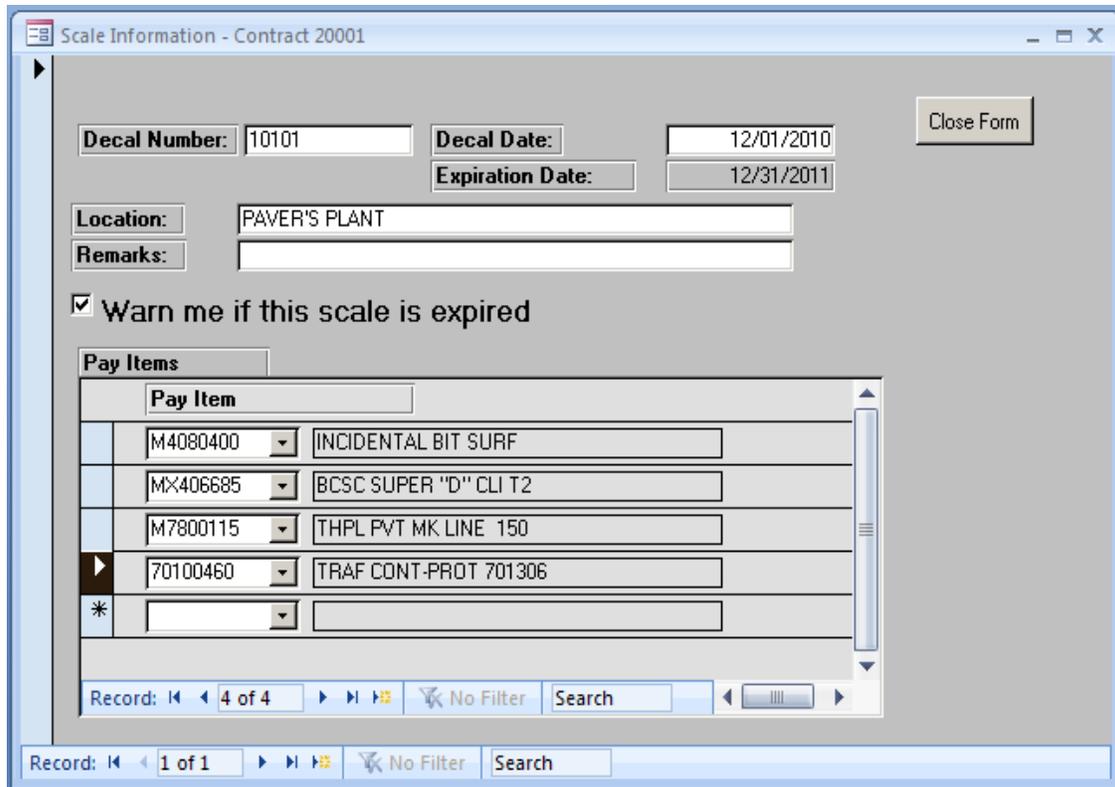
Record: 1 of 2 No Filter Search

Example 23 - Scale Information Pay Item Drop-Down Box

- Click on the Pay Item Drop-down arrow and choose M4080400
- Place your insertion point in the field for the second Pay Item and type *MX*. You can find data by typing in the first few digits and the program will automatically scroll to find a record with matching values. MX406685 is the Pay Item that you want to select.
- Add items M7800115 and 70100460.

Deleting Records and Values

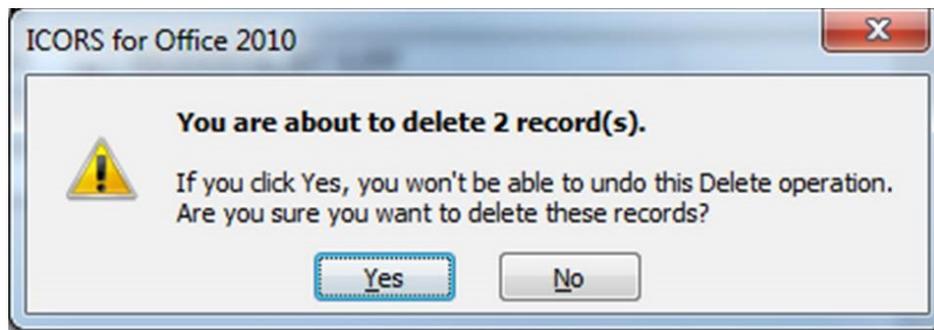
To select:	Do this:
Value	<ul style="list-style-type: none"> Click the data Press the delete button
Record	<ul style="list-style-type: none"> Click the blank box to the left of the pay item Click on the Delete Record  button on your toolbar
Multiple Records	<ul style="list-style-type: none"> Move to and select the first click on the blank box to the left of the pay item. Hold the SHIFT button and click on the next record. Click on the Delete Record  button on your toolbar.



Example 24 - Record Selectors

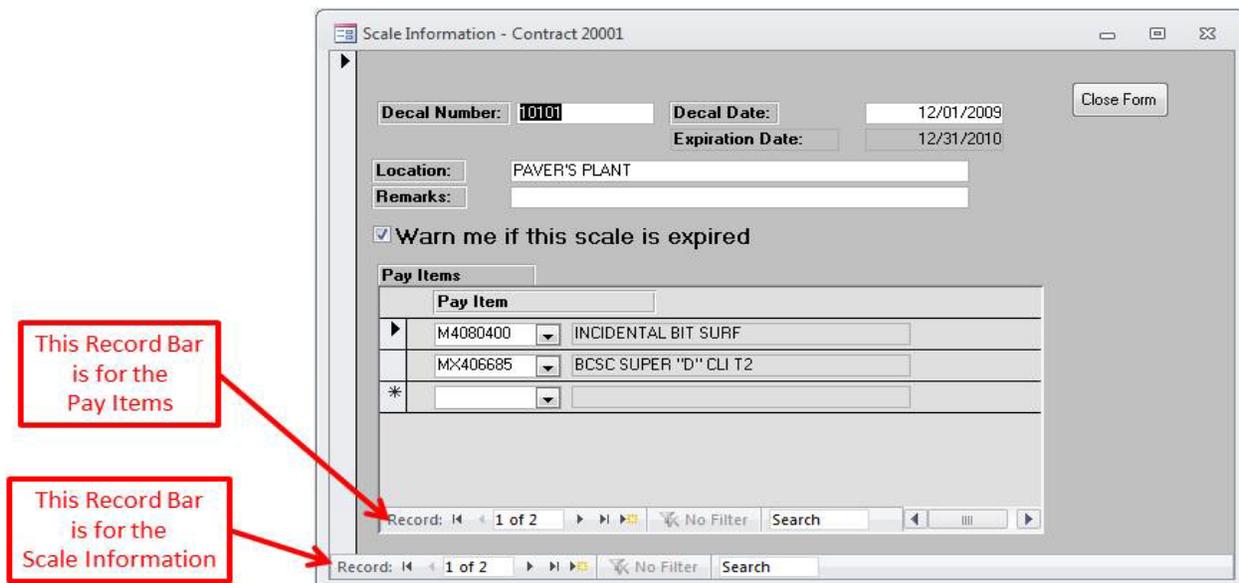
You realize the last two items added are not associated with scale information:

- Using your mouse, select the first pay item to be deleted (M7800115) by clicking and dragging down to the next pay item to be deleted (70100460). To select the pay items, see the example above. Press the Delete Record  button on your toolbar.



Example 25 - Delete Confirmation Dialog Box

- You will be prompted by the dialog box shown above to confirm your decision to delete records. Press **Enter** on your keyboard or click on **Yes**.
- Click on the Add New Record  button on the Scale Information Record bar. (See example below.)



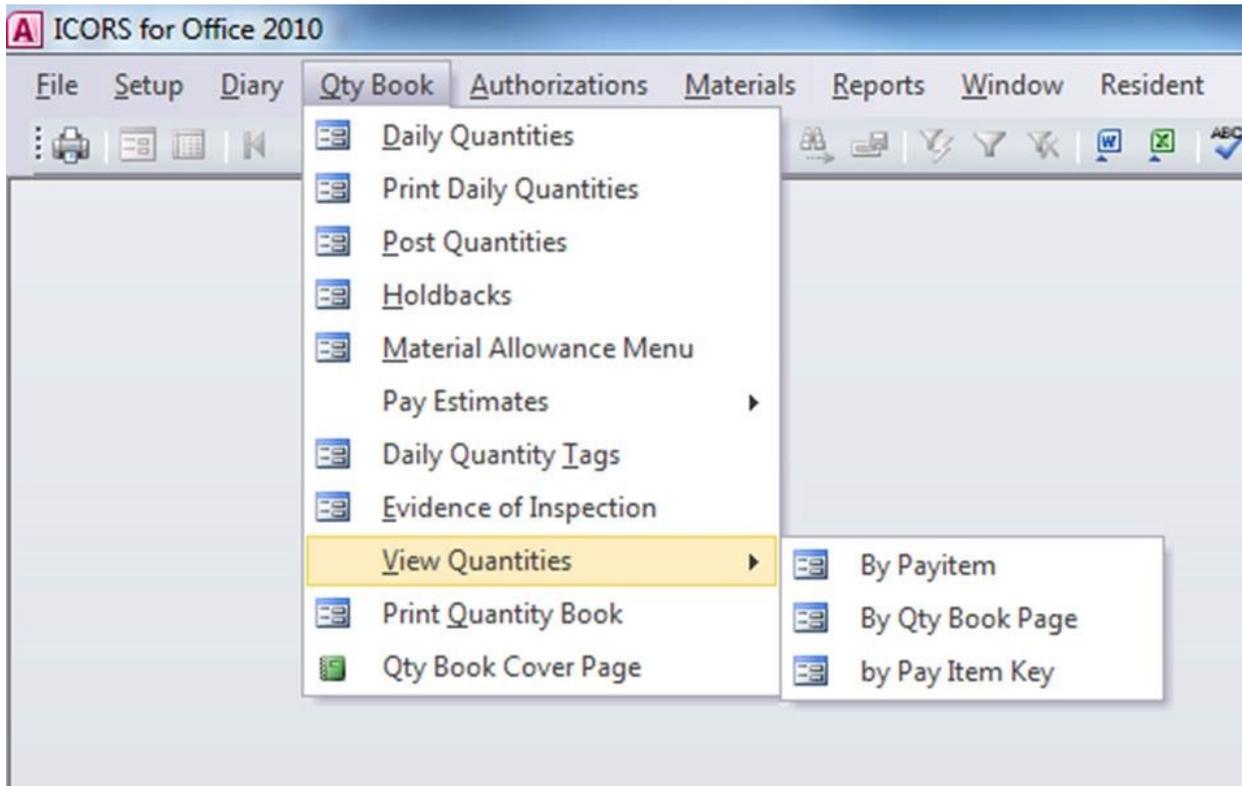
Example 26 - Scale Information Record Bar Identification

- Add scale information for a second location using the following information:
 Decal: 10202
 Decal Date: 8-1-2010
 Location: *Miner's Quarry*
 Pay Items: *M4080300 & M4812000*
- Close the Scale Information form.

Add a Pay Item Key

Like all good ICORS residents, you want to compare your list of pay items in the proposal to the list in ICORS.

- Select **Qty Book** from the menu bar.
- Select **View Quantities**
- Select **by Pay Item Key**



Example 27 - Quantity Book, View Quantities Menu

You can look through each item by clicking on the Next Record  button on the Record bar, or you can look at the DataSheet View by clicking the DataSheet View  button on the tool bar.

On a **rare** occasion a pay item may be deleted from the original contract. You realize that the Field Office has been left out of ICORS. To add the item back to your list:

- Select **Setup** from the menu bar
- Select **Add a Pay Item Key**
- Insert a check in the “Part of Original Notice” box This box should only be checked on items that were part of the original contract and were not included in your ICORS download for the contract. If you check this box for an item that you are adding to the contract you will be unable to add the item to an authorization and unable to correct it.
- The Quantity Awarded is 2
- Enter **67000400** for Pay Item Number (The Drop-down box is not an option for this since the item is missing.)

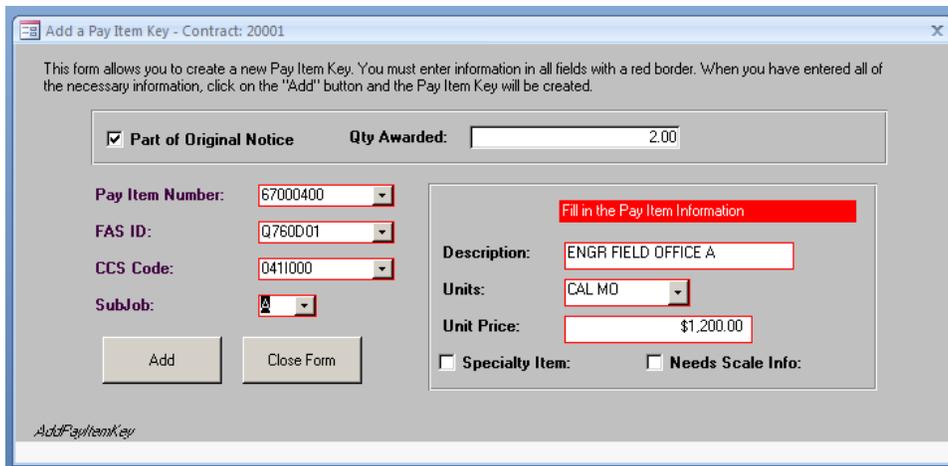
ABSOLUTELY DO NOT USE THE LETTER "O" FOR A ZERO!

This will crash the system in Springfield!

ICORS now prompts you for additional information. Use your **Tab** key to move from field to field.

Enter the following information:

- Description: *ENGR FIELD OFFICE A (Never more than 21 spaces)*
- Unit: Click on the Drop-down arrow and scrolling through the list. Select *CAL MO*.
- Unit Price: *1200* FAS ID: *Q760D01*
- CCS Code: *0411000* SubJob: *A*
- Click on 



The screenshot shows a software window titled "Add a Pay Item Key - Contract: 20001". The window contains a form with the following fields and values:

- Part of Original Notice
- Qty Awarded: 2.00
- Pay Item Number: 67000400
- FAS ID: Q760D01
- CCS Code: 0411000
- SubJob: A
- Description: ENGR FIELD OFFICE A
- Units: CAL MO
- Unit Price: \$1,200.00
- Specialty Item
- Needs Scale Info

Buttons at the bottom include "Add" and "Close Form". A red banner above the Description field says "Fill in the Pay Item Information".

Example 28 - Add a Pay Item Form

- Close the form by clicking on 
- Verify that it was included in contract by going back to the pay item keys
 - Select **Qty Book** from the menu bar.
 - Select **View Quantities**
 - Select **by Pay Item Key**

≡ Your setup is now complete ≡

Lesson 2: Daily Quantities

When you record daily work on a project, you are recording Daily Quantities. With ICORS, you will still want to maintain a field book or IDR's where you can document your calculations. Remember to maintain your primary source of documentation and reference it on your DQ. The information you enter into the Daily Quantities records is used to create the Quantity Book and Pay Estimate.

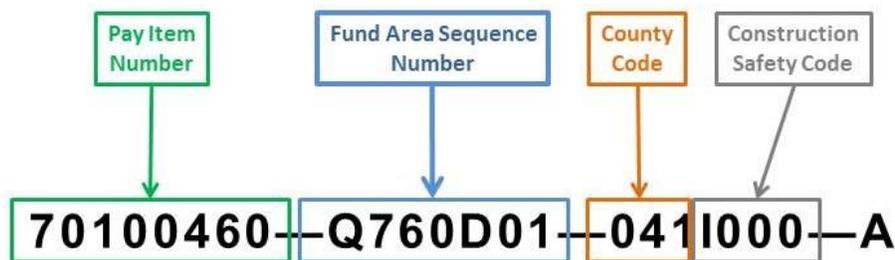
Entering Daily Quantities

Enter Daily Quantities for Traffic Control, Prime and Agg Prime Ct.

- Select **Qty Book** from the menu bar
- Select **Daily Quantities**

FAS ID & CCS codes are found on Award Report.

- Enter the Date: 3-15-2011,
- For the "Contractors" field, click on the drop-down arrow and select *Pavers, Inc.*,
- Choose the Pay Item Key number indicated in the Example below (Example 24).



Example 29 - Pay Item Key

(You can enter this information by using the drop-down arrow or begin typing the data in the field.),

- Qty Inspected: .25,
- For the "Estimate or Final" field, type the letter *E*, (notice that the word Estimate was automatically inserted for you),
- You should now be at the "OK to Post" check box. Press the on your keyboard to insert a check mark,
- Evid. of Inspection: *I.A.W. Traf. Ctrl. Std.*
- Location: *Entire Project*,
- Source of Progress Doc: *N/A*
- The Pavers also used BIT MATLS PR CT and AGG PR CT on 3-15-2011.

- Click on the Add New Record  button
- Enter the following information:
 - Date: *press* **Ctrl** + **“**, **Tab**
 - Contractor: *press* **Ctrl** + **“**, **Tab**
 - Pay Item: M4080100-Q760D01-0411000 –A, **Tab**
 - Qty Inspected: 1234, **Tab**
 - Estimate or Final: *Final*
 - OK to Post: Using your mouse pointer, click in this field to insert a check mark, **Tab**
 - Evid. of Inspection: *Apprd. List & Bill of Lading w/Ticket in File*, **Tab**
 - Location: *Entire Project* or **Ctrl** + **“**
 - Source of Progress Doc: *Tickets*

NOTE -
 From time to time you will have to add other Evidences of Inspection such as "As per standard" to the existing Evidence of Inspection list. You can add them while you are entering DO's. Just click in "Setup- Evidence of Inspection". Since we're in windows, we can easily switch between and open multiple screens

- Click on the Add New Record  button
- Enter the following information for the third entry:
 - Date: 3-15-2011
 - Contractor: *Pavers, Inc.*
 - Pay Item Key: *M4080300-Q760D01-0411000 –A*
 - Qty Inspected: 3.5
 - Estimate or Final: *Final*
 - OK to Post: ✓
 - Evid. of Inspection: *Apprd. List(Source) & Tickets in File*
 - Location: *Entire Project* or **Ctrl** + **“**
 - Source of Progress Doc: *Tickets*

Click on the Datasheet View  button and maximize your screen to check your DQ entries.

DQ Number	Date	Contractor	Pay Item Key	Qty Inspected	Estimate or F	Ok to Post	Posted	Evid. of Inspe	Location	Source of Prt
1	03/15/2011	Pavers, Inc.	70100460-Q760D01-0411000 -A	0.250	Estimate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	I.A.W. Traf. Ctr	Entire Project	n/a
2	03/15/2011	Pavers, Inc.	M4080100-Q760D01-0411000 -A	1,234.000	Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Apprd. List & Bi	Entire Project	Tickets
3	03/15/2011	Pavers, Inc.	M4080300-Q760D01-0411000 -A	3.500	Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Apprd. List(Sou	Entire Project	Tickets
*						<input type="checkbox"/>	<input type="checkbox"/>			

Example 30 – Data Sheet View of Daily Quantities

Posting Daily Quantities

You can post an individual record by choosing  and/or you can print an individual record by choosing .

- Change your view back to Form View by clicking on the Form View  button on your toolbar.
- Post DQ #3 by clicking on the Last Record  button and clicking on .

Example 31 – Posted (Locked) Daily Quantity

The Date, Pay Item Key and Qty Inspected are now deselected and cannot be modified by anyone including Springfield. So please make sure it is correct prior to posting the DQ to the Quantity Book. All other fields may be changed if necessary.

- Close the Daily Quantities form.
- Select **Qty Book** from the menu bar.
- Select **Post Quantities** from the Qty Book Drop-down menu

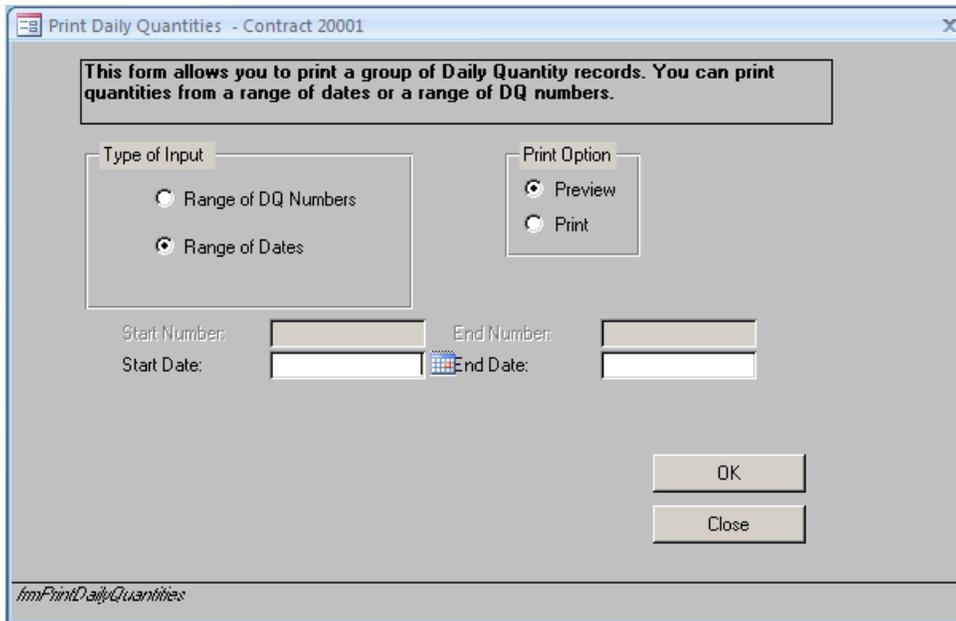
Post	DqNbr	Date	Pay Item Key	PayItem	Quantity	
<input type="checkbox"/>	1	03/15/2011	70100460-Q76D01-0411000 -A	TRAF CONT-PROT 701306	0.25	Entire Pr
<input type="checkbox"/>	2	03/15/2011	M4080100-Q76D01-0411000 -A	BIT MATLS PR CT	1,234.00	Entire Pr
<input type="checkbox"/>	3	03/15/2011	M4080100-Q76D01-0411000 -A	BIT MATLS PR CT	3.50	Entire Pr

Example 32 – Daily Quantities Post Screen

- Select each record individually or click on . (You can deselect an individual record by clicking in the Post check box.)
- Click on . The records are now locked.
- Close the Daily Quantities Post Screen.

Printing Daily Quantities

- Select **Qty Book** from the menu bar
- Select **Print Daily Quantities** from the Qty Book Drop-down menu



Print Daily Quantities - Contract 20001

This form allows you to print a group of Daily Quantity records. You can print quantities from a range of dates or a range of DQ numbers.

Type of Input

Range of DQ Numbers

Range of Dates

Print Option

Preview

Print

Start Number: End Number:

Start Date: End Date:

OK

Close

fmPrintDailyQuantities

Example 33 – Print Daily Quantities dialog box

- Choose *Range of DQ Numbers*
- Start Number: 1
- End Number: 3
- Click on .

You will be taken to a Print Preview screen. You would click on the Print  button on your toolbar to send the DQ's to the printer. As you don't have a printer today, please compare this preview screen to the next page of the manual. If they don't match, please ask the instructor to review the preview screen with you.

Contract: 20001	State of Illinois		Resident: Resident Engineer
County: MARSHALL	Department of Transportation		Supervisor: Field Engineer
Section: 101-67	ICORS System		Field Office Phone: (309)671-3668
	Daily Quantities		Job Number: C-95-100-97
Route: FA 10			Project: FTYH-9876
District: 4			
DQ Number: 1	Date: 08/15/2011	Contractor: Pavers, Inc.	
Pay Item Key: 70100460-Q760D01-0411000 -A	TRAF CONT-PROT 701306		
Qty Inspected: 0.25	LSUM	Posted <input checked="" type="checkbox"/>	Paid on Estimate Nbr: Estimate or Final: Estimate
Evidence of Inspection: I.A.W. Traf. Cntl. Std.			
Location: Entire Project			
Source of Progress Documentation: na			
DQ Number: 2	Date: 08/15/2011	Contractor: Pavers, Inc.	
Pay Item Key: M4080100-Q760D01-0411000 -A	BIT MATLS PR. CT		
Qty Inspected: 1,234.00	LITER	Posted <input checked="" type="checkbox"/>	Paid on Estimate Nbr: Estimate or Final: Final
Evidence of Inspection: Apprd. List & Bill of Lading w/Ticket in File			
Location: Entire Project			
Source of Progress Documentation: Tickets			
DQ Number: 3	Date: 08/15/2011	Contractor: Pavers, Inc.	
Pay Item Key: M4080300-Q760D01-0411000 -A	AGG PR. CT		
Qty Inspected: 3.50	MTON	Posted <input checked="" type="checkbox"/>	Paid on Estimate Nbr: Estimate or Final: Final
Evidence of Inspection: Apprd. List(Source) & Tickets in File			
Location: Entire Project			
Source of Progress Documentation: Tickets			

Example 34 - Daily Quantity Printout

- If the information on this preview screen is incorrect, you will have to do corrective Daily Quantity entries to correct the problem as you have posted the quantities, which locks them from revisions.
- Close Preview screen
- Close the Print DQ screen.

Notes –

Creating Pay Estimates

You can now create a pay estimate. You paid for 3.5 M tons of AGG PR CT, but you have some reason to only pay for 3.0 M tons.

A holdback allows you to document an entire quantity in the Quantity Book but only place a portion of it on a Pay Estimate. This can be used to Hold Back payment on all or a portion of an item due to missing paperwork (Payrolls, Monthly EEO reports, Materials Inspection, etc.). The reason for the Hold Back would be placed in the Remarks and the Hold Back Report can be sent to the Contractor with the Pay Estimate.

- Select **Qty Book** from the menu bar
- Select **Holdbacks** from the **Qty Book** menu
- Enter .5 in Holdback Quantity for AGG PR CT

Qty Book Page	Pay Item:	HoldbackQty	Remark
70100460-Q760D01-A	TRAF CONT-PROT 701306	0.00	
M4080100-Q760D01-A	BIT MATLS PR CT	0.00	
M4080300-Q760D01-A	AGG PR CT	.5	
M4080400-Q760D01-A	INCIDENTAL BIT SURF	0.00	
M4812000-Q760D01-A	AGGREGATE SHLDS B	0.00	
M6310000-Q760D01-A	SPBGR	0.00	
M7800115-Q760D01-A	THPL PVT MK LINE 150	0.00	
M7800140-Q760D01-A	THPL PVT MK LINE 600	0.00	
MX406685-Q760D01-A	BCSC SUPER "D" CLI T2	0.00	

fmHoldbackEntry

Record: 3 of 9 No Filter Search

Close Form

Example 35 – Holdback Entry Form

- Close the form
- Select **Qty Book** from the menu bar
- Select **Pay Estimates** from the Qty Book menu
- Select **Print Holdbacks** from the Pay Estimates menu

This takes you to a Print Preview screen. Here you can see the .5 you just entered. Click on the Print  button on the toolbar to print the report. You can print or preview any or all of the reports listed in the Pay Estimates menu: Unposted Quantities, Expired Scales, Holdback and/or Overages.

- Close the report
- Select **Qty Book** from the menu bar/
- Select **Pay Estimates** from the Qty Book menu
- Select **New Pay Estimates** from the Pay Estimate menu
- Enter *Today's Date* in the Pay Estimate Date (Usually you will this will be the default date.)
- Action to Take: Print a test estimate
- Click on 
- Notice that you are paying for 3.0 Tons of Aggregate Prime instead of 3.5 due to the holdback quantity enter previously.

Route: FA10	Illinois Department of Transportation Division of Highways Report of Resident	Contractor: Pevera Inc.
Section: 101-67	Line Item Detail of Completed Work-In-Place	Ctr Number: 12672
Job Number: C-95-100-97		Contract: 20001
Resident: Resident Engineer (309)671-3658		County: MARSHALL
Working Days Charged to Date: 000	Pay Estimate Number: 1	
Date From: To: 3/25/2011	TEST ESTIMATE	
SubJob: A FAS ID: Q760D01		

Pay Item Nbr	Quantity Awarded	Added by Authorization	Deducted by Authorization	Adjusted Total Quantity	Completed at Last Report	Total Completed to Date
M0406685 BCSC SUPER 'D' CLIT2	8,049.000	0.000	0.000	8,049.000	0.000	
M4080100 BIT MATLS PR CT	1,185.000	0.000	0.000	1,185.000	0.000	1,185.000
M4080800 AGG PR CT	5.000	0.000	0.000	5.000	0.000	3.000
M4080400 INCIDENTAL BIT SURF	220.000	0.000	0.000	220.000	0.000	
M4812000 AGGREGATE SHLDS B	1,760.000	0.000	0.000	1,760.000	0.000	
M6310000 SPGR	1,123.000	0.000	0.000	1,123.000	0.000	
M7800115 THEPLVNT MKLINE 150	44.000	0.000	0.000	44.000	0.000	
M7800140 THEPLVNT MKLINE 600	8.000	0.000	0.000	8.000	0.000	
67000400 ENGR FIELD OFFICE A	2.000	0.000	0.000	2.000	0.000	
70100460 TRAF CONT-PROT 701306	1.000	0.000	0.000	1.000	0.000	0.250

Resident: _____	Regional Engineer: _____
Date Prepared: _____	Date Mailed: _____

Friday, March 25, 2011
Page 1 of 1
CF-720-004

Example 36 - Test Pay Estimate

As you don't have a printer today, please compare this preview screen to the screen copy below. If they don't match, please ask the instructor to review the preview screen with you.

WARNING:

- **PRINT TEST ESTIMATES UNTIL YOU ARE SURE YOUR ESTIMATE IS CORRECT!**
- **ONCE YOU CHOOSE PRINT ESTIMATE AND POST, YOU ARE DONE.**
 - **YOU CANNOT CHANGE YOUR ESTIMATE AT THIS TIME.**
 - **THE SYSTEM WILL NOT ALLOW YOU TO CORRECT A POSTED ESTIMATE.**
 - **IF YOU DO ANOTHER PAY ESTIMATE YOUR ESTIMATE NUMBERS WILL BE OUT OF SEQUENCE SINCE THE CENTRAL BUREAU OF CONSTRUCTION CANNOT PROCESS TWO PAY ESTIMATES AT THE SAME TIME FOR THE SAME CONTRACT.**

At this point, you've carefully checked your test estimate and you know that your estimate is correct.

- Close the preview form for the test estimate.

Example 37 – Pay Estimate Calculation dialog box

**Error in Printing a Test Estimate –
“Error Number 5 - Invalid Procedure Call or Argument”**

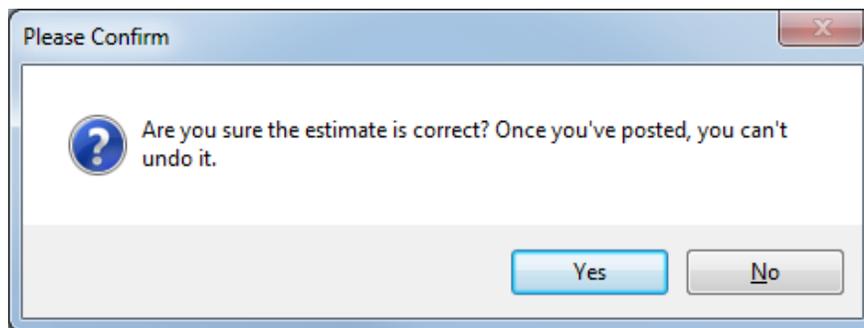
THIS PROBLEM USUALLY IS CAUSED BY A BLANK LINE IN THE AUTHORIZATION.

Electronic Pay Estimate Submittal Using Microsoft Outlook 2010

At this point you have created and reviewed your Test Estimate. You are ready to submit the Pay Estimate Electronically using Microsoft Outlook.

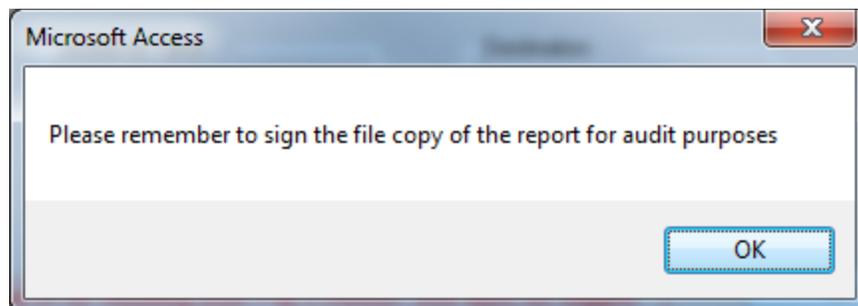
☞ We strongly recommend you use Outlook to send your Pay Estimates / Weekly Reports ☜

- Make sure you have Outlook Open and you are logged in to your Email system.
- Switch back to ICORS (The Keyboard Shortcut is **Alt** + **Tab**)
- From the Pay Estimate Calculation dialog box Select **“Print Estimate and Post”**
- Destination: **“Electronic”**
- **DO NOT CHOOSE “Diskette” option if you do not have a “Disk Drive (A:)”**



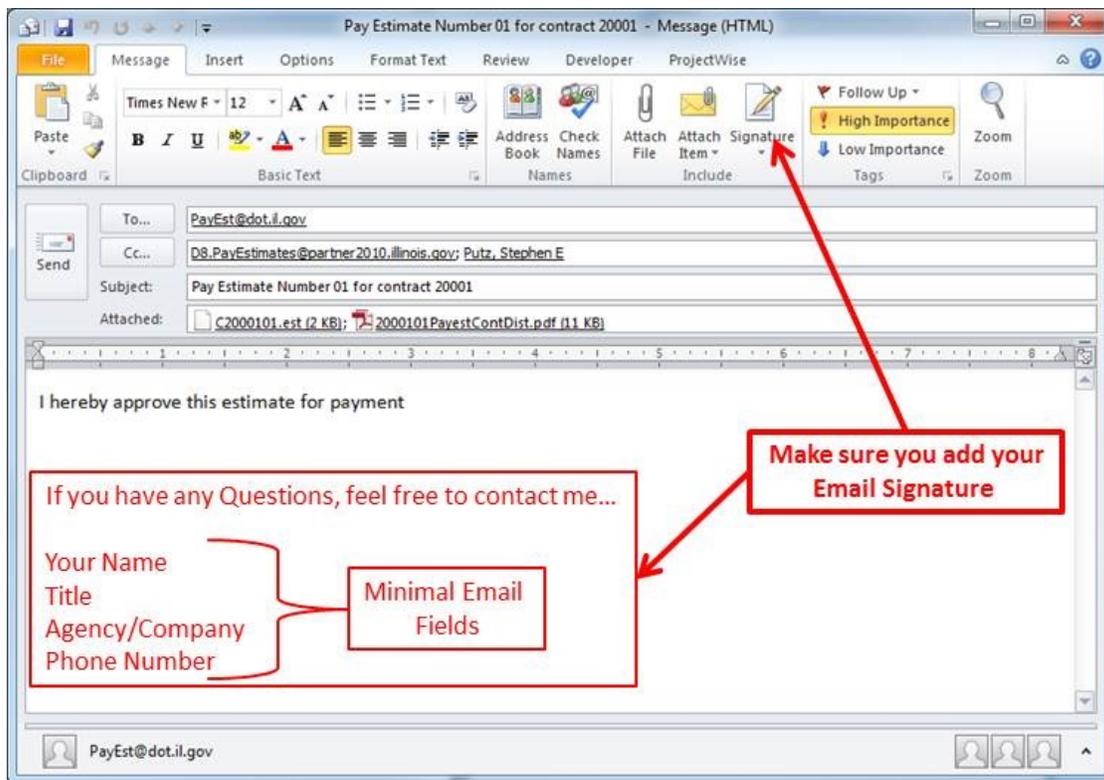
Example 38 – Test Estimate Confirmation Dialog Box

- Click on
- You will get at “Please Confirm” Notification as seen in Example 33
- If you are really sure – click on
- ICORS will create another notification reminding you to sign the file copy of the Pay Estimate for audit purposes as seen in Example 34 below.



Example 39 - Sign File Copy of Pay Estimate Reminder

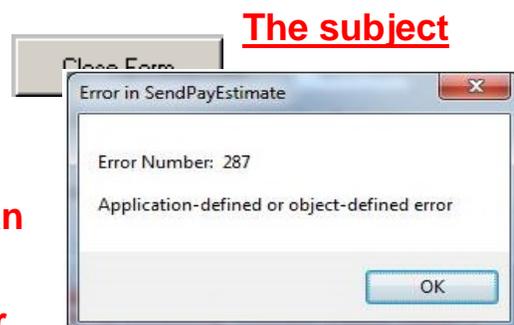
Click on **“OK”**



Example 40 - Pay Estimate Email

- ICORS will now Print the Pay Estimate, MAKE SURE YOU SIGN THE FILE COPY!
- ICORS will then create the Pay Estimate Email as seen in Example 35
- Make sure you include your Signature Block in the body of the email.
- As you can see, ICORS attached the required files and the additional contract email addresses as setup in “Lesson 1 – Contract Email Address Setup”.
- Close the Pay Estimate Calculation Form, Click on

- **DO NOT EDIT THE SUBJECT LINE!**
line is used by other programs
- **If you do not have Microsoft Outlook Open (Up and Running in the background) the program will create an Error as shown in Example 36.**
 - **Click on the “OK” to close the Error.**
 - **From your Start Menu, Find and Open Microsoft Outlook.**
 - **Switch back to ICORS and recreate the Electronic Pay Estimate.**



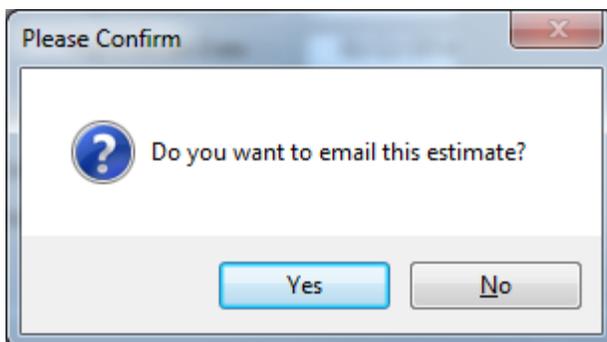
Example 41 - Email Creation Error

≡ Your pay estimate is now complete ≡

Electronic Pay Estimate Submittal Not Using Outlook

If You Do Not Have Or Use Microsoft Outlook; You Will Need To Create An Email Using The Program That You Use:

- Route to the required and correct email addresses
- Create the Subject Line in the Correct Wording Format
- Attach the required files
- Add the proper wording to the body of the email with your Signature Block.
- At this point you have created and reviewed your Test Estimate. You are ready to submit the Pay Estimate Electronically using a Email program other than Outlook.
- From the Pay Estimate Calculation dialog box Select **“Print Estimate and Post”**
- Destination: **“Hardcopy Only”**
 - **DO NOT CHOOSE “Diskette” option if you do not have a “Disk Drive (A:)”**
- Click on
- You will get at “Please Confirm” Notification as seen in Example 33
- If you are really sure – click on
- ICORS will ask you if you want to email the Pay Estimate (Example37)



Example 42 - Email Confirmation

- Electronically, Choose “NO”
- At this time ICORS does not create the reminder notification to sign the file copy of the Pay Estimate for audit purposes. **MAKE SURE YOU SIGN THE FIELD OFFICE FILE COPY.**
- Close the Pay Estimate Calculation Form, Click on
- ICORS creates the electronic files and saves the files to the **“C:\Download2000”** file folder.

- For pay estimate #2 Contract 20001 the files will be:
 - “C2000102.est” - This is the Electronic Text Version of the Pay Estimate. It is used by Springfield personnel to Process the Pay Estimate.
 - “2000102.pdf” - This is the Electronic Version of the Printed Pay Estimate. It is in Adobe Reader File format and is used by the District Office and is saved to the D8Implementation – Contract Support Pay Estimate SharePoint Document library.
 - “20001 BC131.pdf” - This is the Electronic Version of the BC-131 in Adobe Reader File format. **You will need to include this file if required.**
 - Attach the files to an Email and send to the required email addresses as outlined in “Lesson 1 – Contract Email Address Setup”.
- Remember: You must include the following in the email:
 - **The Subject Line must be formatted correctly. For additional Information Refer to:**
[IDOT Weekly Report & Pay Estimate Email Guideline for Local Agency/Consultants](#)
[IDOT Weekly Report and Pay Estimate Email Guideline for IDOT Residents](#)
 - **An email Signature that has your Name, Title, Agency/Company Name and Your Phone Number!**
 - The statement “ I approve this estimate for payment” Must be in the “Body” of the Email Message. **NOT in the Subject Line!**
 - When emailing is complete, you can delete these files from the download directory.

≧ Your pay estimate is now complete ≦

Comments:

- **IF YOU REALIZE YOU MISSED SOMETHING – SHAME ON YOU!**
- **DO TEST ESTIMATES UNTIL YOU ARE ABSOLUTELY SURE!**
- **DO NOT DO ANOTHER PAY ESTIMATE AND DO NOT TRY TO CORRECT THE ERRONEOUS ESTIMATE UNTIL YOU RECEIVE A COPY OF THE INVOICE FOR THIS PAY ESTIMATE.**
- **THEN, DO ANOTHER PAY ESTIMATE TO MAKE THE CORRECTION. IT IS IMPERATIVE THAT YOU CHECK YOUR TEST ESTIMATES!**

REALIZING THAT SOMEONE WILL DISREGARD ALL THESE INSTRUCTIONS AND MAKE SOME ERROR SO LARGE (I.E., GROSS OVERPAYMENT) THAT WAITING UNTIL YOU RECEIVE A COPY OF THE INVOICE FOR THIS ESTIMATE WOULD BE COMPOUNDING EARLIER POOR JUDGEMENT.

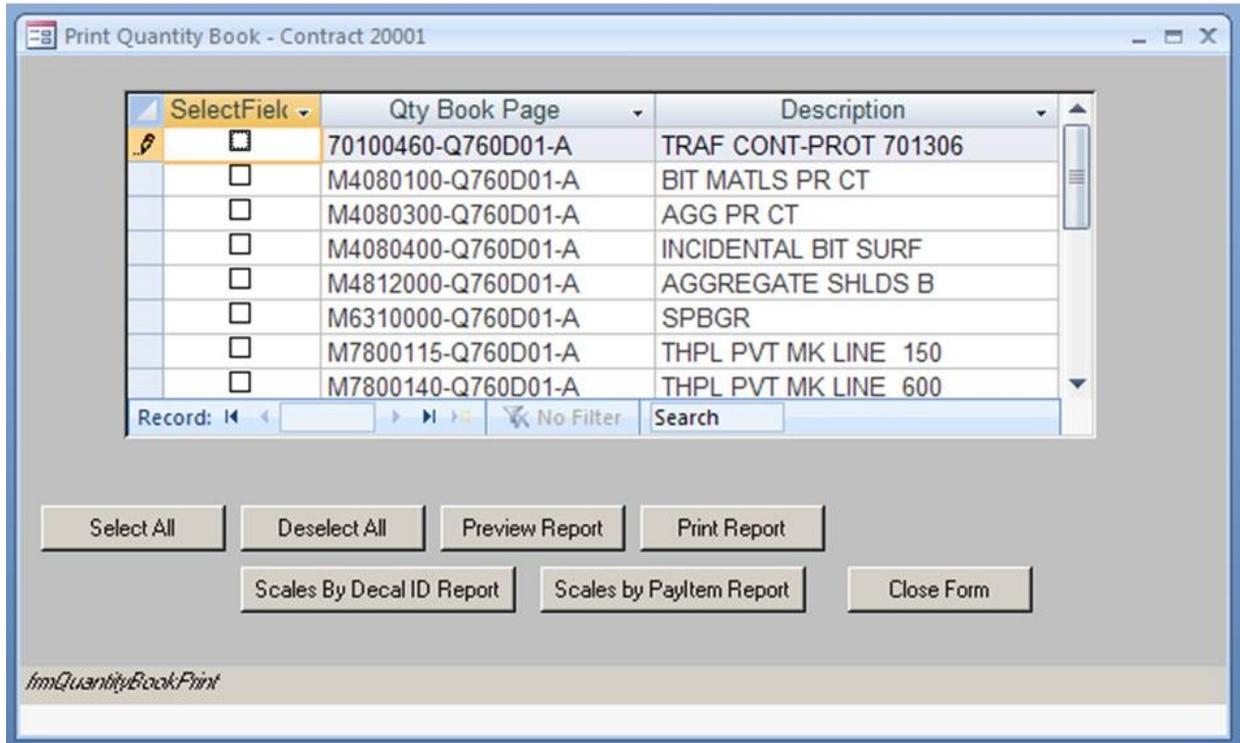
⇒ YOU CAN CALL **CONTRACT SUPPORT**. THEY WILL GIVE YOU INSTRUCTIONS FOR SUBMITTING YOUR ESTIMATE. DON'T FORGET TO CREATE AND POST POSITIVE OR NEGATIVE DQ'S TO ACCOUNT FOR THE ERROR. THE CORRECTED TOTALS WILL BE IN THE ICORS SYSTEM FOR YOUR NEXT ESTIMATE.

Paying for Holdbacks

When you want to pay for holdbacks simply change the holdback quantity to zero.

Printing Quantity Book

- Select **Qty Book** from the menu bar
- Select **Print Quantity Book** from the Qty Book menu



Example 43 - Print Quantity Book Form

- You can select individual items or select them all.
- Select **"M4080300 AGG PR CT"** by clicking on the Box under the Select Field column. This will place an X in the box.

- Click on **Preview Report**  **This does not show "HOLD BACKS"**

To print, click on the Printer  button on your toolbar.

- Select **File, C**lose All Forms
- **To print Quantity Book at the End of Job, "Select All" and Print.**
- **The "Index" will be the last page to print.**
- **DO NOT PRINT IN "PRINT PREVIEW"!!!**

Lesson 3: The Diary

The ICORS Diary is used to keep a daily account of activity at the field site. You will use the ICORS Diary to record the daily activities. Part of the Diary will be printed on the Weekly Report. The information you enter into the ICORS Diary is essentially the same information you have entered into hard-bound diaries in the past.

Making Diary Entries

- Select **Diary** from the menu bar
- Select **Project Diary**

Example 44 - Completed Diary Page

- Enter the following information:

Date: 03-14-2011,

Controlling Item: Paving,

Persons Working: 2,

Hours Worked: 8,

Weather: Sunny 35-45,

Working Days Charged: 0,

Weekly Report Paragraph: Pavers set up Field Office today. Begin payment

Click on the Add New Record  button

For additional Information regarding Diary Entries refer to:

- ["Current Construction Manual – Documentation of Contract Quantities"](#)
- Standard Specifications for Road and Bridge Construction - Art. 108.03 through 108.09

DO NOT SKIP DAYS unless the contract is suspended!

- Enter the following information:

Date: 3-15-2011,

Controlling Item: *Since the controlling item has not changed, press + ,*

Persons Working: 2,

Hours Worked: 8,

Weather: *Sunny 45-58*,

Working Days Charged: 1,

- Even though you would not normally charge a working day before May 1, for the purpose of this example, charge a working day on this date.
- Weekly Report Paragraph: *Pavers set up traffic control. They cleaned and primed the pavement.*
- Click on the Add New Record  button

- Enter the following information:

Date: 03-16-2011

Controlling Item: *Since the controlling item has not changed, press + ,*

Persons Working: 0,

Hours Worked: 0,

Weather: *Cloudy 35-38*,

Working Days Charged: 0,

Weekly Report Paragraph: *No work.*

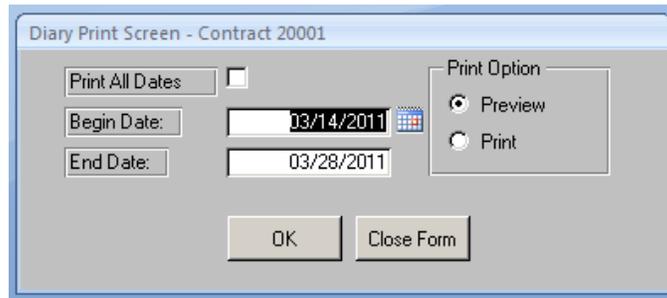
Close the Form by clicking on the

NOTES:

Printing Diary Entries

You have two choices for printing your diary entries:

- After you enter your diary information for the day – Click on 
 - This will show you a Print Preview screen so you can double check for accuracy.
 - When you are ready to print, click on the Print  button on your toolbar.
- Another print option is to select Diary, Print Diary Records. You will see the following dialog box:



Example 45 - Diary Print Screen

- You can print all dates or enter a starting and ending date.
- Click on the Box to the Right of **Print All Dates** to select All Records between the “Begin Date” and “End Date”.
- Choose **Preview** by clicking on the Round Dot in the Print Option section.
- This allows you to look through all the entries using the  keys at the bottom of the Preview window.
- Close the Print Preview by clicking on the bottom Close  or the  button in the upper right hand corner of your screen.
- Close the Diary form.

NOTES:

Creating a Weekly Report

- Select **Diary** from the menu bar.
- Select **Weekly Report** from the Diary menu.

Example 46 - Weekly Report Form

- Enter the following information:
 - Weekly Report Number: 1
 - Ending Date: 03-19-2011
 - Estimated Completion Date: 6-15-2011
 - **Tab** through Suspend Date and Resume Date.
 - Percent Complete: Click on **Calc Percent Complete** or you can manually enter data.
 - The contractor has already told you there will be a materials delay and they won't finish on time, so enter the following information:
 - Will contractor complete the project on time at present rate of progress?: No
 - Why Not?: *Aggregate Shortage*
 - Have you discussed progress with the contractor this week?: Yes (You should discuss progress with the contractor on at least a weekly basis.)

- Ending dates End on Saturdays.
- After you enter the first ending date, it will be automatically entered for you on subsequent weeklies.
- Weeklies Consist of 7 Days...

As you don't have a printer today, please compare this preview screen to the screen copy below. If they don't match, please ask the instructor to review the preview screen with you.

- Select  , ICORS will create the Electronic files for the Report.
- Click on the Print  button on your toolbar to print out a hard copy.

- Close the Print Preview by clicking on the  button in the upper right hand corner of your screen.



**Illinois Department
of Transportation**

**Weekly Report
of Resident**

County: MARSHALL
Section: 101-67

Report No: 1	Week Ending: 3/19/2011	% Complete: 0.00
Contract Price: \$467,814.97	Estimated Completion Date: 6/15/2011	Route: FA 10
Contractor: Pavers, Inc.	Contract Working Days: 15.00	District: 4
Contract Completion Date:	Average Number of Persons Working: 2	Contract No. 20001
Time Limit Extended To:		Job No. C-95-100-97
		Project: FTYH-9876

Execution 02/24/2011	Start 03/15/2011	Reports Suspended:	Reports Resumed:	Significant Completion:
Resident Name: Resident Engineer				

Day	Date	Hours Worked	Controlling Item	Working Days Charged	Workable Days	Provide summary of Contractor's and Subcontractor's operations each day. Compare performance with Progress Schedule. A reason must be provided when less than a full working day is charged.
Mon	3/14/2011	8.00	Paving	0.00	0.00	Pavers set up Field Office today. Begin payment. No other work.
Tue	3/15/2011	8.00	Paving	1.00	0.00	Pavers set up traffic control. They cleaned and primed the pavement.
Wed	3/16/2011	0.00	Paving	0.00	0.00	No Work.

Total This Week:	1.00	0.00
Previous Total:	0.00	0.00
Total To Date:	1.00	0.00

Will Contractor Complete project on time at present rate of progress? No

If no - Why? Aggregate Shortage

Have you discussed rate of progress with Contractor this week?: Yes

If no - Why?

Orig: Regional Engineer
c.c.: Contractor
Bur. Construction
Project File

Resident _____ (309) 671-3658

NOTE: If the Contractor disagrees with the working day charges, detailed reasons must be expressed in writing to the Regional Engineer within 7 days after receipt of report.

Printed 3/28/2011 9:12:32 AM

BC 239 (Rev. 02/06/09)

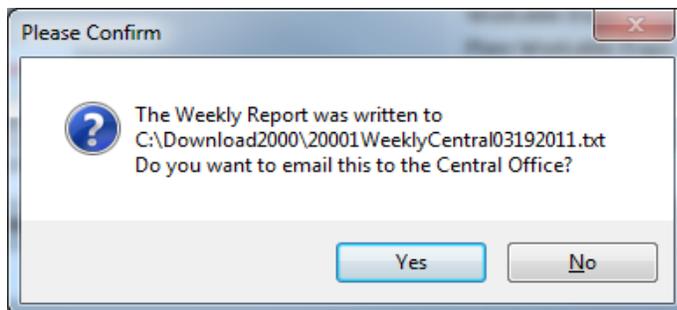
Example 47 - Weekly Report of Resident

Electronic Weekly Report Submittal Using Microsoft Outlook 2010

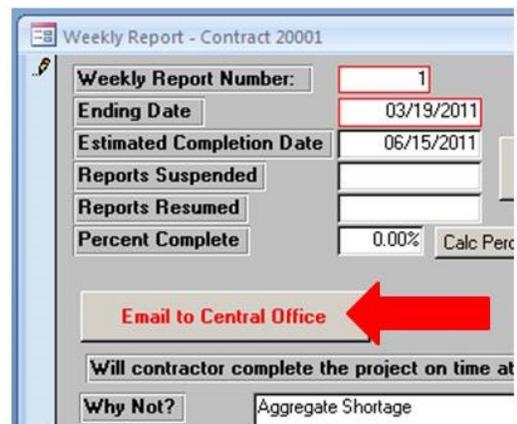
At this point you have created, reviewed and printed your Weekly Report. You are ready to submit it electronically using Microsoft Outlook.

➡ We strongly recommend you use Outlook to send your Pay Estimates / Weekly Reports ◀

- Make sure you have Outlook Open and you are logged in to your Email system.
- Switch back to ICORS (The Keyboard Shortcut is **Alt + Tab**)
- Click on the **“Email to Central Office”** button. See Example 43.
- You will get at “Please Confirm” Notification as seen in Example 44



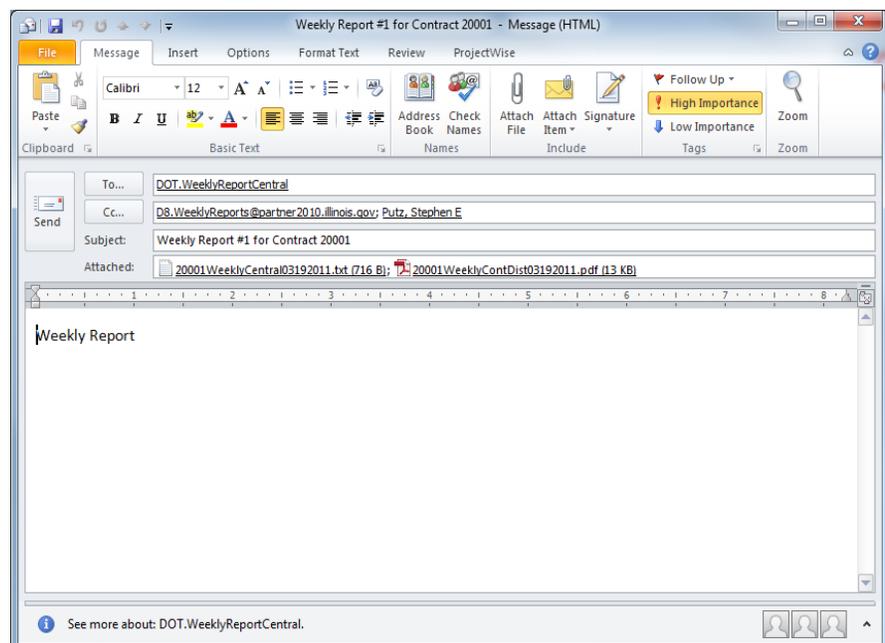
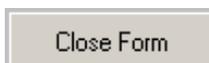
Example 49 - Email Weekly Report Please Confirm Notice



Example 48 – Email To Central Office

- Click on **“Yes”** button. ICORS will create the weekly report’s electronic files and the Email Message in the same manner as it did in the Pay Estimate, except you will not get the confirmation notifications.

- Click on the Email’s **“Send”** Button.
- Refer to the Weekly Report Email Cheat Sheet for additional information.
- Close the Weekly Report Form by Clicking on



Example 50 - Weekly Report Email

Weekly Report Submittal Not Using Outlook

If You Do Not Have Or Use Microsoft Outlook; You Will Need To Create An Email Using The Program That You Use:

- Route to the required and correct email addresses
- Create the Subject Line in the Correct Wording Format
- Attach the required files
- Add the proper wording to the body of the email with your Signature Block.
- At this point you have printed the Weekly Report. ICORS created the electronic files when I generated the Print preview of the report. You are ready to submit the Weekly Report Electronically using a Email program other than Outlook.
- The weekly report Electronic Files were written to the C:\Download2000 directory to be attached to an email for submittal.
- For Weekly Contract 20001, week ending September 26, 2009; the files will be:
 - **"20001WeeklyContDist09262009.txt"** - This is the Electronic Text Version of the Weekly Report. It is used by Springfield personnel to Process the Weekly Report.
 - **"20001WeeklyContDist09262009.pdf"** - This is the Electronic Version of the Printed Weekly Report. It is in Adobe Reader File format and is used by the District Office and is saved to the D8Implementation – Contract Support Weekly Report SharePoint Document library.
- Attach the files to an Email and send to the required email addresses as outlined in "Lesson 1 – Contract Email Address Setup".
- Remember: You must include the following in the email:
 - **The Subject Line must be formatted correctly. For additional Information Refer to:**
 - [IDOT Weekly Report & Pay Estimate Email Guideline for Local Agency/Consultants](#)
 - [IDOT Weekly Report and Pay Estimate Email Guideline for IDOT Residents](#)
 - **An email Signature that has your Name, Title, Agency/Company Name and Your Phone Number!**
- When emailing is complete, delete these files from the download directory.
- Close the form
- Now if you print the diary pages, they will reference the Weekly Report #.

Add one more diary entry for the next week:

- Select **Diary** from the menu bar.
- Select **Project Diary** from the Diary menu.
- Click on the Add New Record  button

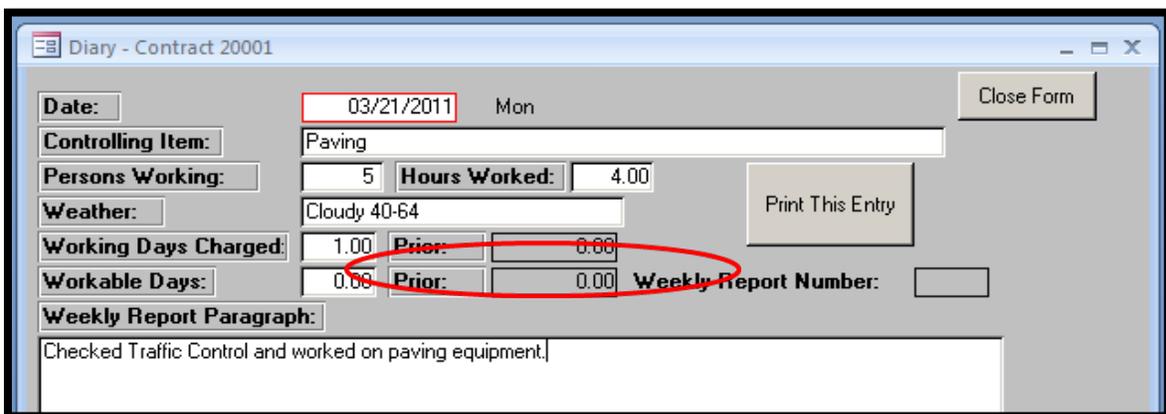
 If you don't click on the Add New Record button, you will overwrite an existing record. 

- Enter the following information:
- Date: 03-21-2011
- Controlling Item: **Ctrl** + **“**
- Persons Working: 5
- Hours Worked: 4
- Weather: Cloudy 40-64
- Working Days Charged: 1
- Weekly Report Paragraph: *Checked Traffic Control and worked on paving equipment.*

Note:

- Diary Entries should be done every day.

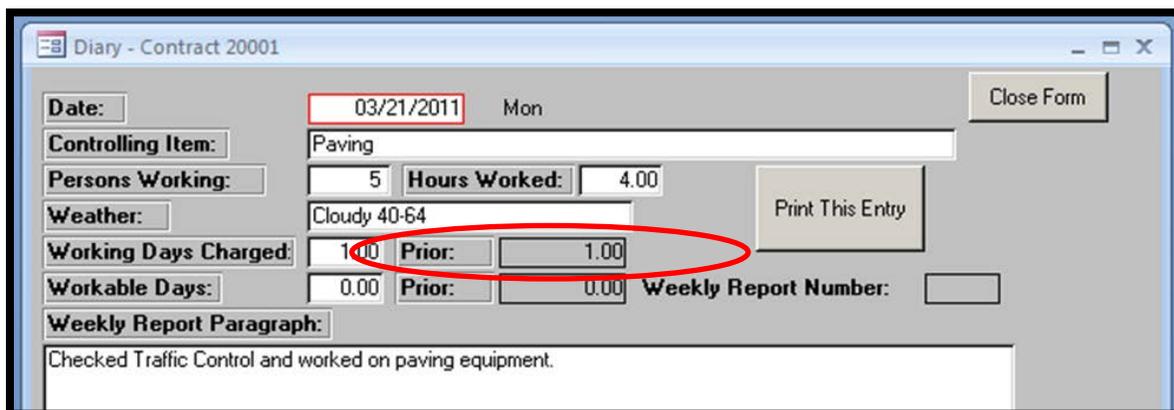
➡ Notice at this time Prior = 0.00 ◀



Example 51 - Diary Page before Work Day Change

- Press **Shift** + **Enter**

➡ Notice Prior is now 1.00 ◀



Example 52 – Diary Page after Work Day Change

- Close the form.
- Select **Diary**, then select **Weekly Report**

Lesson 4: Authorizations (BC-22)

An Authorization for Contract Change is required when you need to add new pay items to or change a pay item quantity awarded with the contract. The ICORS database has greatly reduced the amount of time it takes to prepare an Authorization. You can keep track of approvals or rejections in the database, and Balancing and Overage authorizations can be generated automatically in the database.

For additional Information, Refer to the Current Construction Memorandum #4

Entering Authorization Information

- Select **Authorizations** from the menu bar.
- Select **Authorization Entry** from the Authorizations menu.

Example 53 - Blank Authorization Form

- Enter the following information:
- AuthNum: 1
- Letter: This is the Authorization Letter. It is used when the authorization is an adjustment to a work effort submitted on a previous authorization. For this example, we will not use a letter.
- Subjob: A

- Auth Date: 03-21-2011 (field defaults to the current date, but a different date may be entered.)
- Select: **Change Order**
- Select: **Major Change**
- Change Order, Contract Adjustment, Major Change, Minor Change, Emergency Change, and Time Extension Requested. These fields should be marked as needed. This is accomplished by clicking in the check box with the mouse pointer or by tabbing to the check box and pressing the space bar.
- Determination: *The undersigned determine that the change is germane . . . because the change in design is necessary to fulfill the original intent of the contract.* Select **G4** in the Drop-down field.
- Location and Reason: *Route from location to location. See attached explanations.*
- Pay Item Key: *MX406685-Q760D01-041I000*
- Category: 26
- Quantity: 10
- Add/Deduct: A
- Now enter a second pay item record for:
 - M4812000-Q76D01-041I000 –A, Aggregate Shlds B
 - Category 26
 - Deduct 60
- Close the form.

New 2010 Version Feature:
➤ PPB Reminder

Authorizations - Contract 20001

AuthNum: [] Letter: A Subjob: [] Auth Date: 03/21/2011 Approved: [] Date Posted in BCM: []

Change Order
 Contract Adjustment

 Major Change
 Minor Change

Current Resident: Resident Engineer/Technician Current Supervisor: Supervising Field Engineer

Determination: **G4**
 The undersigned determine that the change is germane to the original contract as signed, because the change in design is necessary to fulfill the original intent of the contract.

Location and Reason: Route from location to location. See attached explanations.

New	PayItemKey	Category	Qty	Add/Deduc	Status
<input type="checkbox"/>	70100460-Q760D01-041I000 -A	26	10.000	A	Pending
<input checked="" type="checkbox"/>	M4812000-Q76D01-041I000 -A	26	60.000	D	Pending
<input type="checkbox"/>					Pending

Record: 1 of 2

Mark All Accepted Mark All Pending

PPB Authorization

Record: 1 of 1

Example 54 - Completed Authorization form

Adding a New Item

- Select **Authorizations** from the menu bar.
- Select **Add a Pay Item Key** from the Authorizations menu.

➤ **When adding a new pay item to a contract -**

DO NOT check the box "Part of the Original Notice"

Example 55- Add a Pay Item Key Form

- PayItemNbr: X9400200, **Tab**

Notice that the "Fill in the Pay Item Information" Form Appeared.

Example 56 - Fill in the Pay Item Information

- Enter the following information:
 - Description: *Tree Planting*
 - Unit: *Each*
 - Unit Price: *100*
 - For the FASID, enter *Q76C01* and press the **Tab** key
 - For the CcsCode, enter *041X020* and press the **Tab** key
 - Select *A* for the Subjob
 - Click on the **Add** button and Close this Form.

Approving an Authorization

- Select **Authorizations** from the menu bar
- Select **Authorization Entry** from the Authorization menu
 - Locate Authorization 2
 - Date Posted in BCM: 03-29-2011 **BCM: CONTRACT MANAGEMENT**
 - Click on the Mark All Accepted button at the bottom of the screen

Notice that the status on this item has changed to Accepted.

☞ You may mark each item accepted/rejected/pending by using the Drop-down menu in the Status field ☞

- Click on the APPROVE button

☞ Notice that the record is now locked. ☞

The screenshot displays the 'Authorizations - Contract 20001' window. At the top, there are fields for 'AuthNum' (2), 'Letter' (A), 'Auth Date' (03/28/2011), 'Approved' (checked), and 'Date Posted in BCM' (03/29/2011). Below these are radio buttons for 'Change Order', 'Contract Adjustment', 'Major Change', and 'Minor Change'. A red 'Record Locked' message is present. The 'Current Resident' is 'Resident Engineer/Technician' and the 'Current Supervisor' is 'Supervising Field Engineer'. The 'Determination' section contains a text box with the text: 'The undersigned determine that the change is germane to the original contract as signed, because provision for this work is included in the original contract.' Below this is the 'Location and Reason' section with the text: 'Route from location to location. See attached explanations'. A table below shows one row with columns: 'New' (checked), 'PayItemKey' (X9400200-Q76C01-041X020 -A), 'Category' (03), 'Qty' (5.000), 'Add/Deduc' (A), and 'Status' (Accepted). At the bottom, there are buttons for 'Mark All Accepted' and 'Mark All Pending'. The status bar at the very bottom shows 'Authorization' and 'Record: 2 of 2'.

Example 57 – Posted Authorization Form

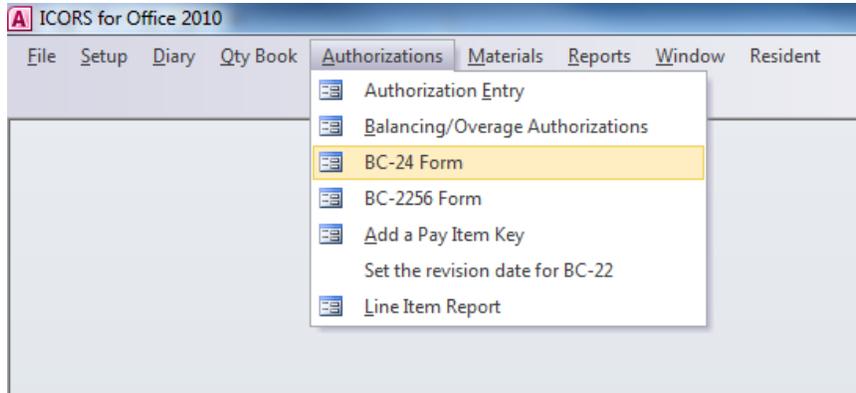
An authorization may be unlocked, to make any necessary adjustments, only by support level or higher level staff (i.e., ICORS Coordinator, Construction Field Engineer, BIP).

- Close the form.

BC 24 Form (for informational purpose only - no data entry required during lesson)

At times you may need to fill out a BC 24 Form. This form is located in the Authorization Menu. This form is filled out when your authorization exceeds \$30,000. Please read Construction Memorandum 04 for more information on the requirements on when to use this form.

- Select **A**uthorizations from the menu bar
- Select **BC-24 Form** from the Authorization menu



Example 59 - ICORS Menu - Authorizations-BC-24 Form

The screenshot shows a 'Request for Procurement Policy Board Waiver' form. It contains the following elements:

- Authorization Number:** A text input field.
- Authorization Amount:** A text input field.
- Submit** and **Close Form** buttons.
- Category Codes (Select One):** A list box with the following items: 01 Balance Final Field Measurements, 03 Allowable Contingencies, 09 Design Change, 12 Utility Caused Change/Addition, 16 Specification Performance Adjustment, 19 Contract Acceleration, 22 Differing Site Condition, 24 Contract Administration, 26 Highway Plan Quantity Omission or Error, and 28 Highway Design Engineering Error.
- What do you want to do?:** Radio buttons for 'Create a file' (selected) and 'Create a file and email it to the Central Office'.
- The undersigned determined that the change is germane to the original contract as signed:** A section with four checkboxes and their corresponding justifications:
 - because provision for this work is included in the original contract.
 - because work of this type was included in the original contract, and the additional efforts of this work are within the intent of the contract and Department policy.
 - because the change represents an adjustment required by the contract, based on unpredictable developments in the work.
 - because the change is necessary to fulfill the original intent of the contract.
- Reason for Extra Work:** A large text area for providing additional details.

Example 58 - BC-24 Blank Form

Balancing/Overage Authorizations

This allows for a balancing or overage authorization to be created automatically by the computer.

- Select **A**uthorizations from the menu bar
- Select **B**alancing/**O**verage Authorizations from the **A**uthorization menu
- **Authorization Number is automatically filled in with the next consecutive number available for authorizations**

Overage/Balancing Authorizations - Contract 20001

This form allows you to create a balancing or an overage authorization. You need to supply the following information before creating the authorization. It will insert default values into some of the fields, such as determination and Category Code. It also will not enter any negative quantities in the authorization. This is designed to handle the most common situations, but you should edit the authorization before sending it in.

Authorization Number:

Letter:

Subjob:

Type

Balancing

Overage

Select All DeSelect All Create Authorization Close Form

fm:AuthBalancingOverage

Example 60 – Overage/Balancing Authorization Form

- Enter Authorization Letter (not applicable here)
- Choose Subjob A
- Choose Overage
- Choose the **Select All** button
- Click on the **CREATE AUTHORIZATION** button
- You will get an Authorization Successfully Completed message.
- Close the form.
- Select **A**uthorizations from the menu bar
- Select **A**uthorization **E**ntry from the **A**uthorizations menu
- Select the last Authorization by clicking on the Last Record  button

Do not do balancing until ALL DQ's are done – at end of job.

ITEMS HAVE TO BE POSTED!

An authorization has been created for M4080100 for an additional 49 Liters of Bit Matls Pr Ct. Close the form.

Lesson 5: Materials

Tracking quantities of materials that have been inspected and reported on a MIRC08 or any other inspection you have received. All Concrete, Bituminous tickets, and Aggregate tickets should be entered in ICORS on a daily basis.

Entering Materials for Tickets

- Select **M**aterials from the menu bar
- Select **I**nspection by Pay Item from the **M**aterials menu
- Select **E**ntry

Inspection by Pay Item - Contract 20001

Date	3/22/2011	INCIDENTAL BIT SURF
Material:	84BIT252S	
Pay Item	M4080400	
Material Qty	157.00	
Unit	TON	
Producer	Oliver Stone	
Inspection/ Remarks	Right Shoulder - Sta 100+00 to 500+67.5	
This is a ticket	<input checked="" type="checkbox"/>	
Inspection Received	<input type="checkbox"/>	
Ticket Type	Bituminous	

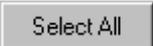
Record: 1 of 1 | No Filter | Search

Example 61 – Inspection by Pay Item form

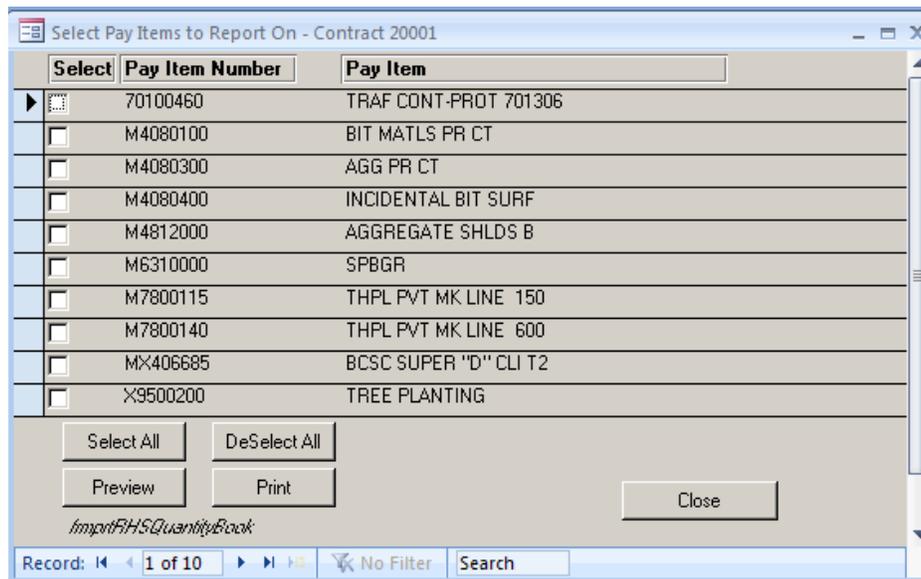
- Enter the following information:
 - Date: 03-22-2011 (**Date on Ticket**)
 - Material: *Mix Design number (Example 84BIT252S 84PCC1234)*
 - Pay Item: *M4080400 INCIDENTAL BIT SURF*
 - Material Qty: 157
 - Unit: TON
 - Producer: *Oliver Stone*
 - Click on this is a ticket
 - Select **Bituminous** under Ticket Type
 - Close the Form.

Viewing Ticket Reports

- Select **M**aterials from the menu bar
- Then **I**nspection by Pay
- Select **R**eport from the

From this window you can individually select Pay Items or .

- Select M4080400 INCIDENTAL BIT SURF



Select	Pay Item Number	Pay Item
<input checked="" type="checkbox"/>	70100460	TRAF CONT-PROT 701306
<input type="checkbox"/>	M4080100	BIT MATLS PR CT
<input type="checkbox"/>	M4080300	AGG PR CT
<input type="checkbox"/>	M4080400	INCIDENTAL BIT SURF
<input type="checkbox"/>	M4812000	AGGREGATE SHLDS B
<input type="checkbox"/>	M6310000	SPBGR
<input type="checkbox"/>	M7800115	THPL PVT MK LINE 150
<input type="checkbox"/>	M7800140	THPL PVT MK LINE 600
<input type="checkbox"/>	MX406685	BCSC SUPER "D" CLI T2
<input type="checkbox"/>	X9500200	TREE PLANTING

Select All DeSelect All

Preview Print Close

Import/HSQuantityBack

Record: 1 of 10 No Filter Search

Example 34 – Select Pay Items to Report On form

- Click on 

This will take you to a Print Preview screen. You can click on the Print  button on your toolbar or press the lower X in the upper left corner of your screen to exit Print Preview.

Miscellaneous Materials Options

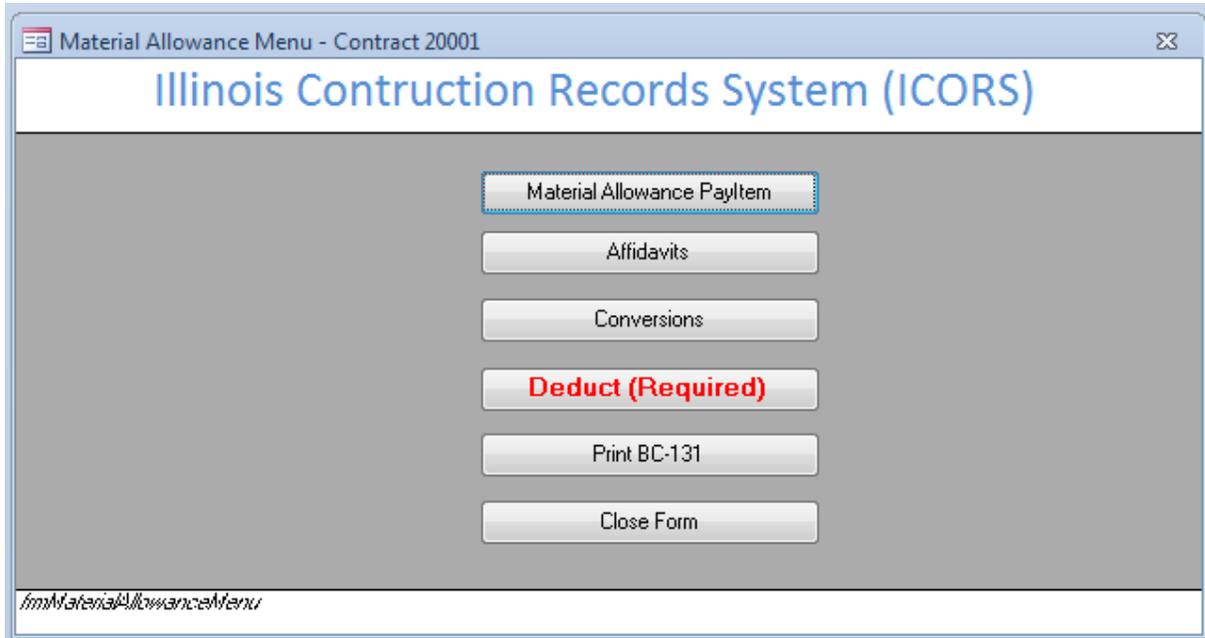
In the **M**aterials Drop-down menu under Inspection by Pay Item there is a ticket report you can generate by each ticket type, material type, date and producer. These reports come in handy for finaling out projects. You can also email these reports to anyone with a snapshot viewer.

Lesson 6: Material Allowances

First time use of the Material Allowance is a simple process. We will be using contract number 20001.

First Time Use of the Material Allowance

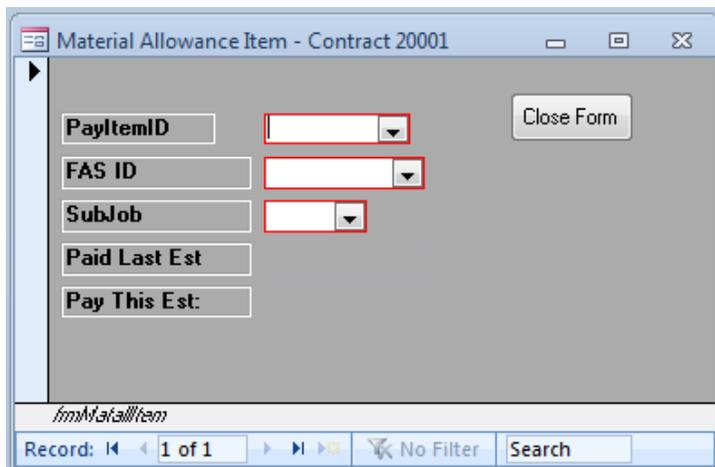
- Select **Qty Book** from the menu bar.
- Select **Material Allowance Menu** from the Drop-down list.
- Click on the **Material Allowance PayItem** button in the Material Allowance Menu dialog box



Example 62 – Material Allowance Menu Dialog Box

or press **Enter** on your keyboard.

- Enter the following information:
 - PayItemID: *MATALL00*
 - FASID: *Q760D01*
 - SubJob: *A*
 - Close the form.



Example 63 - PayItem Entry Form

- From the Material Allowance Menu, select 
- Enter the following information:
 - Material: *GUARDRAIL*
 - Material Allowance Quantity Book Page: *MATALL00-Q760D01-A*
 - Qty: *1000*
 - Unit: *Foot*
 - Unit Cost: *26*
 - Affidavit Date: *3/11/2011*
 - Date Proof of Pay Due: The data for field is automatically generated when a BC 131 is produced.
 - Evidence of Inspection: *Inspected by Dist. Mat'ls.*
- Close the Form.

Automatically calculates 60 consecutive days from Day BC-49 is entered.

Springfield Watches This Closely!
 – We will get a call or email if wrong

Example 64 – Material Allowance Affidavits Form

You should be back at the Material Allowance Menu for Contract 20001.

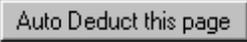
- Click on the  button to link a pay item to the material you want to pay on the allowance.
- Quantity Book Page: *M6310000-Q76D01-A*
- Material: *Guardrail*
- Conv. Factor: *1*
- Close the form.

FUND CODE MUST BE CORRECT AS THIS IS LINKED

CONVERSION LINKS TO A PAY ITEM

When the Conversion Factor Isn't 1

The conversion factor is a ratio of the affidavit quantity to the pay item quantity. ie. guardrail posts to SPBGR lineal ft. Let's say 2 posts per 12.5 foot of rail. So 2 divided by 12.5 equals 0.16, which is your conversion factor.

- Select  from the Material Allowance Menu
- The Qty Used and Qty to Deduct is 0. Click on  to verify the quantity. (You cannot skip this step even though the deduction is zero.)

- Close the form.

- Select  from the Material Allowance Menu

- Preview is the default Output selection. Click on 



Example 65 – Print BC 131 Form

- This will allow you to preview your BC 131 prior to posting. You have the option of printing from the Preview screen or returning to the Print BC 131 Dialog to print a hard copy.
- As you don't have a printer today, please compare this preview screen to the screen copy below. If they don't match, please ask the instructor to review the preview screen with you.

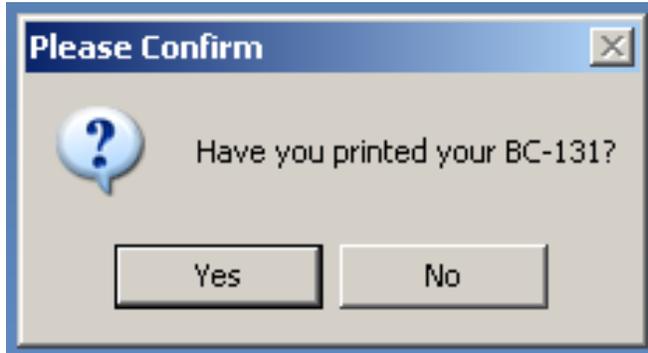
		Statement of Material Allowance							Contract: 20001 County: MARSHALL Section: 101-67 Route: FA 10 District: 4 Job No.: C9510097 Project No.: FTYH-9876	
Submit with Resident's Pay Estimate Estimate No. _____										
Subjob	A									
FASID	Q760D01									
Material	Unit	Receipted Bill Due	Receipted Bill Received	Total From Form(s) BC-49	Paid for in Place to Date	Remaining in Storage	Unit Cost	Remaining		
Guardrail	FOOT	06/06/2011		1,000.00	0.000	1,000.000	\$26.00	\$26,000.00		
Pay Items Using this Material:										
M6310000	SPBGR									
Value of Material on hand:								\$26,000.00		

Example 66 - Printed Statement of Material Allowance

- If this is the correct output, you have to post your Material Allowance.

- Click on 

➡ You must print a BC 131 before posting. ⬅



Example 67 - Please Confirm Printed Copy Dialog Box

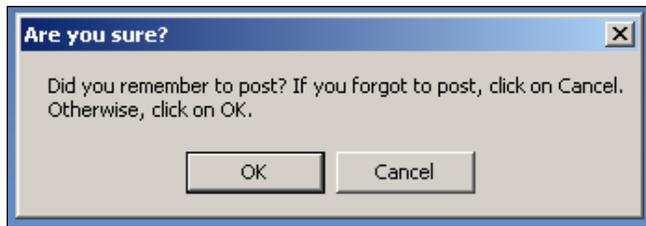
- Click on 



Example 68 – Material Allowance Successfully Posted Dialog Box

- Click on 

- Close the form.



Example 69 – Are You Sure? Dialog Box

- Click on 

- Click on 

NEW Material Allowance Info -

- SEND BC 131
- SEND BC 49
- SEND Invoice

- NO memos
- NO bill of lading
- NO shipping manifests
- NO certified test reports
- NO packing slips
- NO certificate of compliance
- NO pictures

Checking the MATALL00 on the Test Estimate

Assume that you are ready to do a pay estimate. Let's check the test estimate to see if the MATALL00 is correct.

- Select **Qty Book** from the menu bar
- Select **Pay Estimates** from the **Qty Book** menu
- Select **New Pay Estimates** from the Pay Estimate menu
- Select Print a Test Estimate
- Click on 

Your test estimate should show \$26,000 for the MATALL00.

- Close the test estimate

Subsequent MATALL00 Deductions

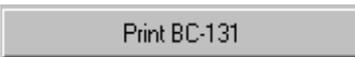
Assume you don't have time to finish your pay estimate and Stripers are installing guardrail. Enter a DQ for SPBGR.

- Select **Qty Book**
- Select **Daily Quantities**
- Click on the **Add New Record** button and enter the following information:
 - Date: *03-28-2011*
 - Contractor: *Stripers, Inc.*
 - Pay Item Key: *SPBGR*
 - Qty Inspected: *380*
 - Estimate or Final: *Final*
 - ✓ *OK to Post*
 - Evid. of Inspection: *LA-15*
 - Location: *Sta. 103+453 to 103+586*
 - Source of Progress Doc: *IDR*
- Click on  (Record is now locked).
- Close the form.
- Select **Qty Book**
- Select **Material Allowance Menu**
- Select **Deduct**
- 380 is the correct converted quantity. Select 

This enters 380 in Qty to Deduct.

Example 70 - Material Allowance Deduction Form

- Close the form

- Click on 

- Preview the BC 131 for accuracy (it should say \$16,120) then 

- Close the form.

- Select **Qty Book**, **Pay Estimates**, **New Pay Estimates**

- Select Print a Test Estimate, then click 

Your test estimate now shows \$16,120 in the Total Completed to Date column for the MATALL00 pay item.

Note: When doing a pay estimate the BC 131 must be attached to the pay estimate.

The only time we need a BC-131 Submitted w/ Pay Estimates is if:

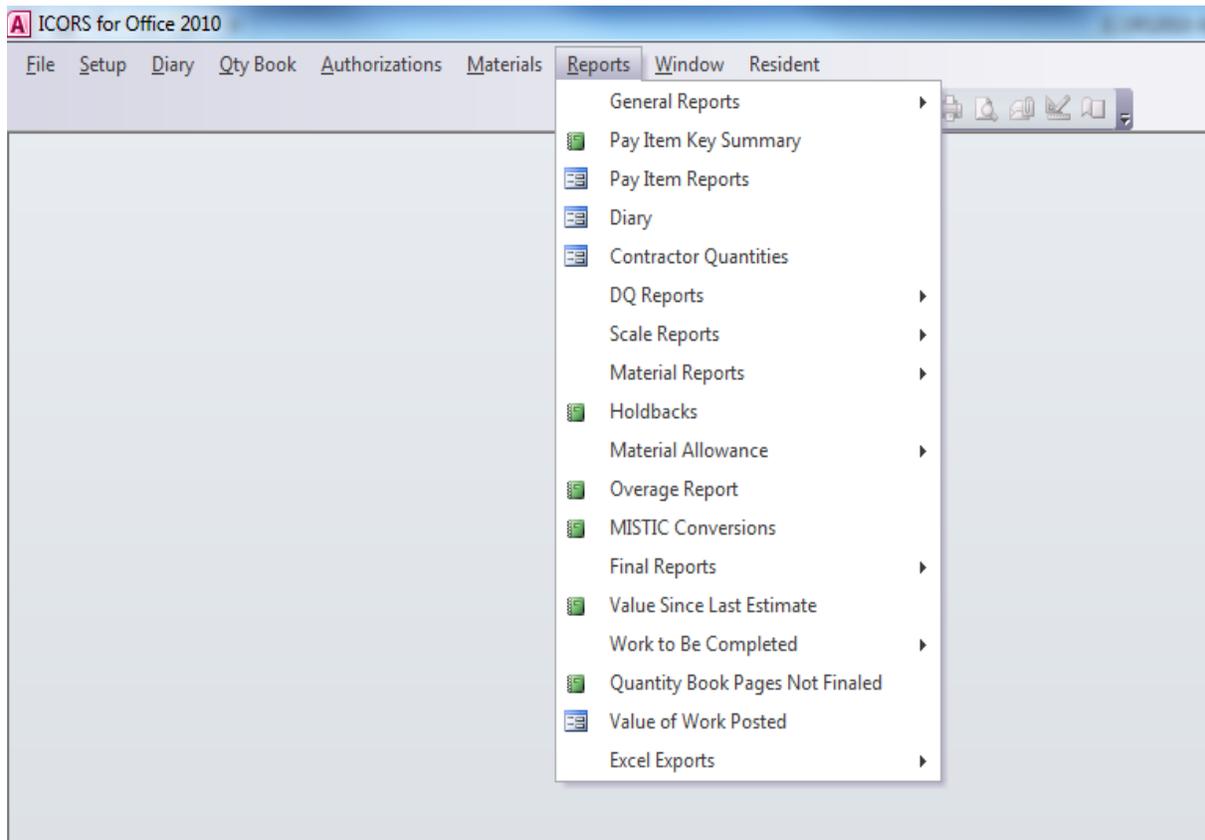
- The Material Allowance is New;
- The Amount is Changing;
- Or the "Receipt Bill Received" Date has been Entered.

If the additional affidavit has the same FASID and Subjob as the first one, start with



on the Material Allowance Menu.

Lesson 7: Reports



Example 71 - Reports Menu

The following are brief explanations of each report available to Resident's.

General Reports

JobStamp	Job stamp information
Supplier Listing	Suppliers
Contractor Listing	Contractors
Pay Item Listing	Pay items, description, unit and unit price
Units and Their Pay Items	Used at the end of the contract after balancing all items. Auditors will use this report.

Pay Item Key Summary

Pay item key, description, awarded quantity, added quantity, deducted quantity, adjusted quantity, and posted quantity.

Pay Item Reports

Pay Item Summary	Pay item number, description, quantity posted, unit price and posted dollar.
Posted Quantities	Posted quantities by pay item key including description, date, quantity, evidence of inspection and location.
Unposted Quantities	Unposted quantities by pay item key including description, date, quantity, evidence of inspection and location.

Value of Pay Estimate - Detail

Duplicates the information from a requested pay estimate and includes the total price per pay item. Summary of dollar amounts for FASID, Subjob and pay estimate.

Diary

Diary pages, all or by date range selection. (This is the same as selecting Diary, Print Diary Records.)

Contractor Quantities

Choose all or any contractor by ranges of dates or pay estimate number.

Level of Detail:	Daily Quantity Line Item Detail	By pay item number, description, DQ number, date, location, quantity and cumulative quantity.
	Summary Information	By pay item number, description, posted quantity.
	Dollars	By pay item number, description, DQ number, location, quantity, unit price and total pay item price.

DQ Reports

Printed Daily Quantities	Daily quantities by range of DQ number or date
Unposted Quantities	Unposted quantities by pay item key

Qty's to be Completed Quantities to be completed by quantity book page item

DQ Grouped by QB Page Daily quantities grouped by quantity book page item

Scale Reports

Scales by Pay Item Scales by pay item, decal number, decal date, location and remarks

Scales by Decal ID Scales by decal number, decal date, location and remarks

Materials Needing Inspection

Holdbacks

Prints out any holdbacks on the contract

Material Allowance

BC49 by Material

BC49s by Date

Material Allowance
Conversions

Overage Report

Lists any overages by pay item key

Mistic Conversions

List of Mistic Conversions

Final Reports

Net Cost of Section Creates net cost of section

Cost Breakdown – Summary Creates cost breakdown showing total dollar value per FAS/CCS

Cost Breakdown Creates cost breakdown showing total dollar value per FAS/CCS listing pay items

Value Since Last Pay Estimate

Shows dollar value of approved posted daily quantities

Work to be Completed

By Quantity Book Page Lists work to be completed by quantity book page item (Item/FAS)

By Pay Item Key Lists work to be completed by pay item key (Item/FAS/CCS)

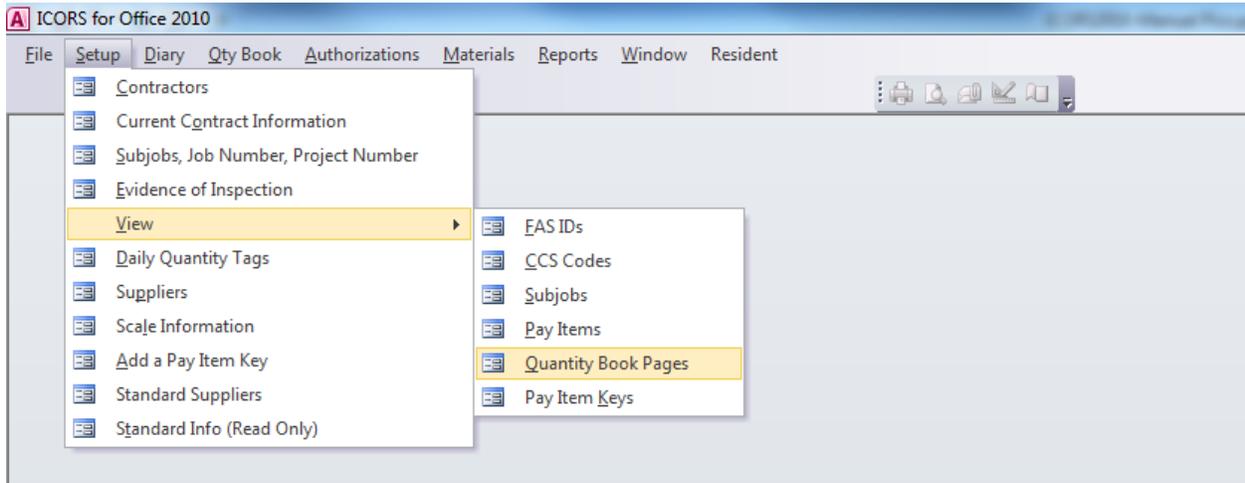
☛ You can exit from any report quickly by pressing the **Esc** key on your keyboard. ☛

Miscellaneous Information

Finaling out the Contract

At the end of the contract, the Resident will need to final all the pay items.

This is located under **Setup, View, Quantity Book Pages**.

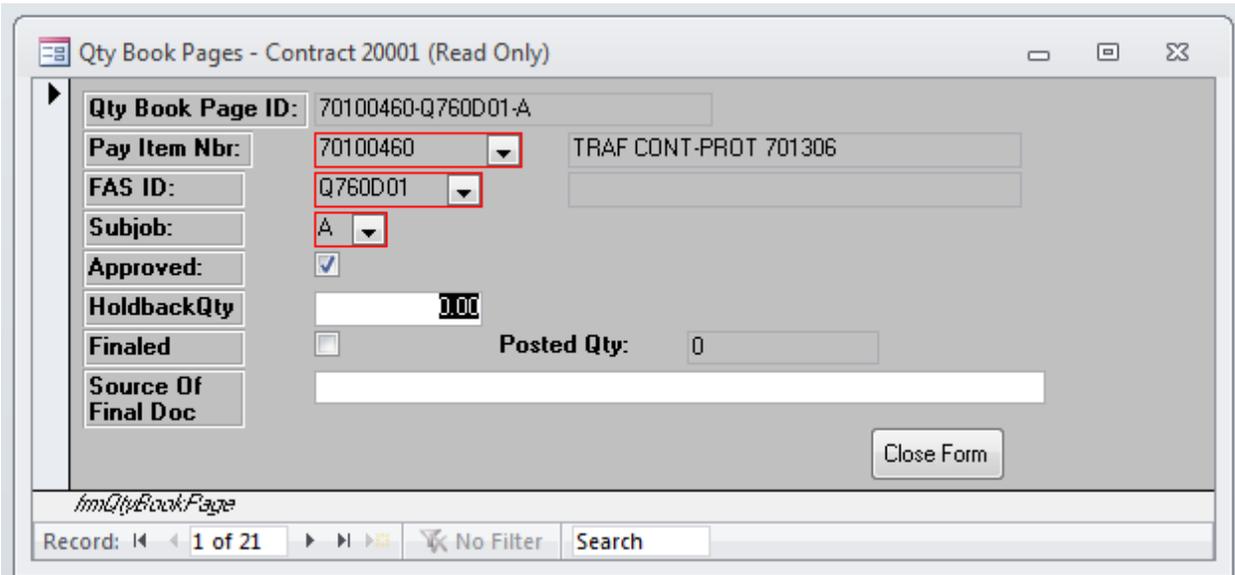


Example 72 - ICORS Menu Quantity Book Pages

Review the final quantity of the pay item. If you agree, place a check in the final box.

Indicate the Source of Final Documentation (per the Documentation Manual directions). For this example of the below pay item use: *Ticket File*

Do this for all your pay items.

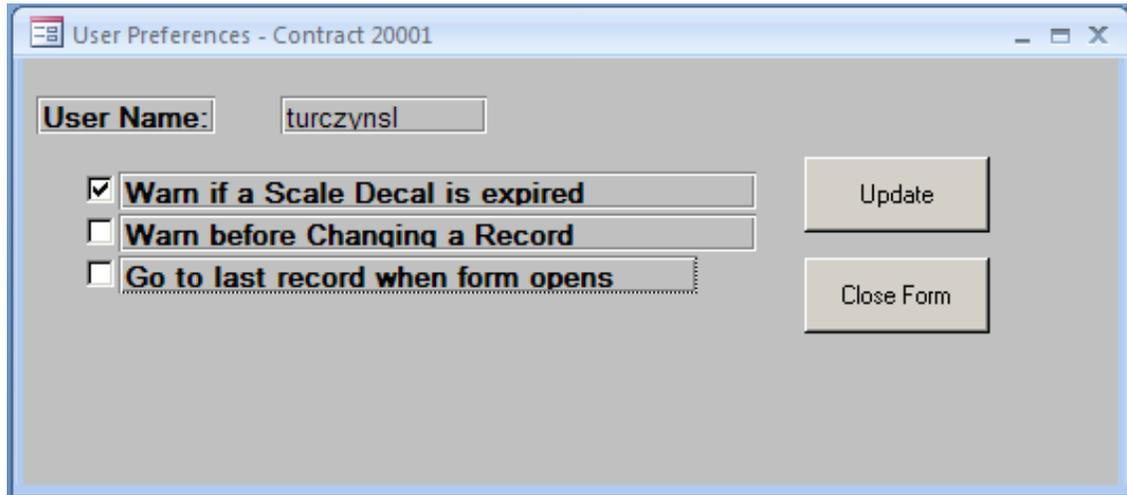


Example 73 - Qty Book Pages

Remember, you can edit all of the Pay Items by Clicking on the  button in the Toolbar

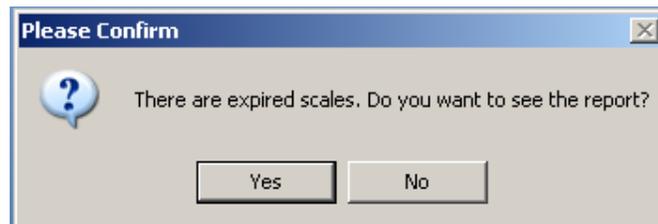
User Preferences

- Select **File, User Preferences**
- Click in the check box for **Warn if a Scale Decal is expired**



Example 74 – User Preferences Dialog Box

- Close this form.
- Select **Qty Book** from the menu bar, then select **Daily Quantities**



Example 75 – Expired Scale Warning

- Select **Yes**.

The scales you have entered for this lesson have not expired. This is for information purposes only.

You will get the above message every time you open the DQ's until you turn off the warning.

- Select **Setup, Scale Information**
- Deselect the check box for **Warn me if this is expired** (Do this for both scale records.)
- Close the form. (This cancellation will not take effect until this form is closed.)

Now open the DQ's. You should no longer get the warning message.

- Select **File, User Preferences**
- Warn before Changing a Record

This may be handy while getting used to ICORS 2010. It won't take long before you will want to turn this option off.

- Go to last record when form opens

Use this selection if you like the most recent record to appear on the screen, or you can use the Last Record  button when the form opens.

Resident

As a resident of a project, it is up to your discretion to add ICORS users

- Select **Resident, Add a User**
 - **.DATA ENTRY is for DQ entry only** – No posting of quantities allowed, No Pay Estimates or Authorizations.
 - **ASSISTANT** - Has the same level of usage as the Resident: Assistant Abilities:
 - Can Post Quantities
 - Create and Accept Authorizations
 - Send Pay Estimates
 - Cannot add Users.
 - User Name should be 4 – 20 characters in length. Enter the user name and security group. The user should create, enter and verify his/her password.
 - Residents should not know anyone else's password. You take on additional liability if you do.
 - Resident can also change a user security level or delete users by:
 - Select **Resident, Change User Security Level** or
 - Select **Resident, Change User Level**.

Remarks for FAS ID's, CCS Codes or Subjobs

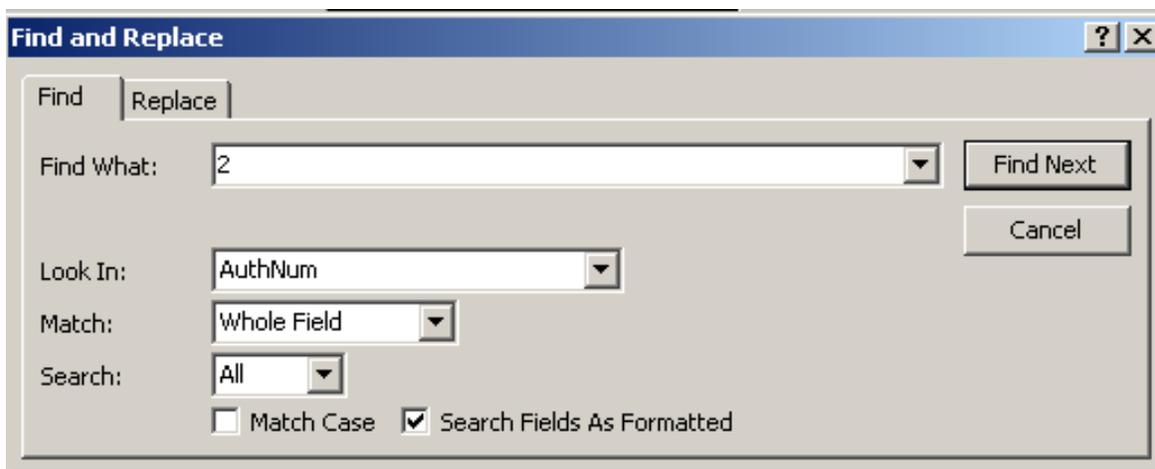
- Select **Setup, View, FAS ID, CCS Codes** or **Subjobs**
- Then enter your remarks.

Database Maintenance

You should NOT use any of the other ICORS Utilities unless instructed to do so by ICORS Support.

Finding Data Using the Find Icon

If you ever need to go to a authorization or DQ that may me require to page through a lot of entries the "Find" icon  could make things easier.



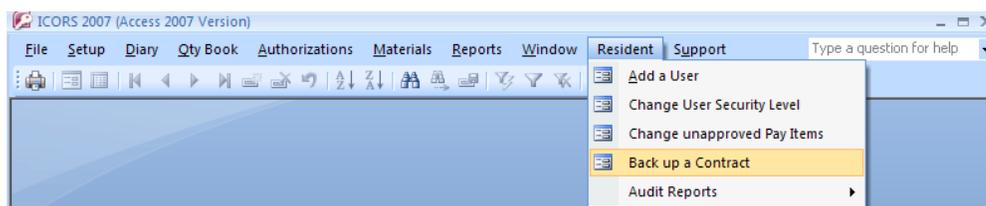
Example 76 - Find and Replace Dialog Box

- Highlight the field of what you want to locate
- Click on the  or Select "CTRL" & "F"
- Type in the number of which entries you are looking for.
- Use the pull down menu to customize your search

ICORS Final Contract Backup – Email to District Office

This Procedure has been revised; Residents now submit their Contracts Final Backup via Email to the Following Email address: D8.ICORS-Backups@partner.illinois.Gov

- **DO NOT** create a final back up of the files until:
 - 1. The Contract is at 100% Completion and**
 - 2. You receive the final pay estimate letter.**
- In order to get the final backup through the firewall, you must create a compressed file folder (.Zip). Follow these Steps:
 1. In the ICORS menu under the **Resident** choose "**Back up a Contract**".



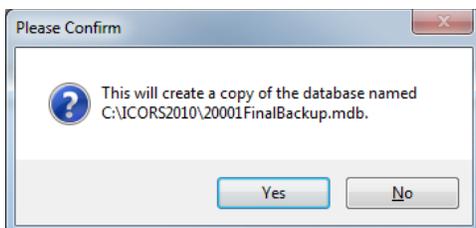
Example 77 - Resident-Back up a Contract

2. Select the contract number to back up and click on **Create Backup File.**



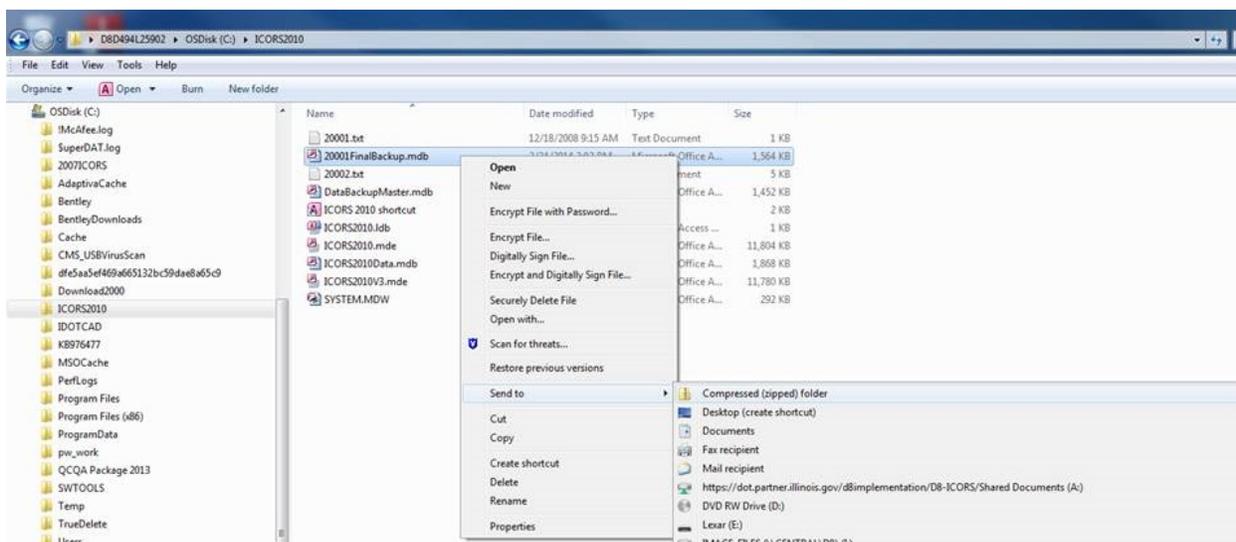
Example 78- ICORS Contract Backup Form

3. You will be prompted to Confirm, Click **“Yes”**.



Example 74 - Backup File Please Confirm

4. Follow the prompts to create the contract file. **Exit ICORS** when complete and then **Open Outlook.**
5. The final backup file that was created is located in the C:\ICORS2010 directory.
6. Highlight the file that was created in step 4 (Example 75)
7. Right click on the contract#FinalBackup.mdb file
8. Select: **Send To**



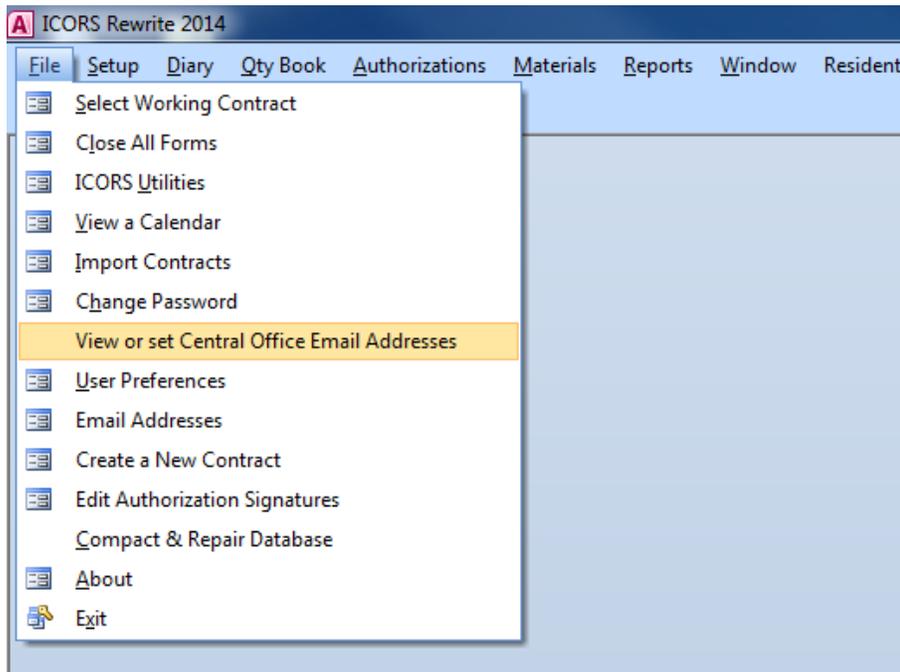
Example 80 - ICORS Backup File Location

9. Select: **Compressed (Zippered) Folder** (This new folder will be created in the ICORS directory folder)
10. Right click on zippered folder
11. Select: **Send To**
12. Select: **Mail Recipient**
13. An Email Message will be created with the backup file attached. Enter the email address in the "To:" field - D8.ICORS-Backups@partner.illinois.gov
14. Click on **Send**.

View or set Central Office Email Addresses

The ICORS Program has been revised to allow changes to the Central Office Email Addresses. This allows Local Agency and Consultants to change the email address for all of their contracts so that Pay Estimates are forwarded to the correct person.

1. Select **File**, the select **View or set Central Office Email Addresses**



Example 81 - View or set Central Office Email Addresses

2. The "Set Email addresses for Pay Estimates and Weekly Reports Dialog box will open as show in Example

Set Email Addresses For Pay Estimates and Weekly Reports

Illinois Construction Records System (ICORS)

Pay Estimate Email Address: dot.payest@illinois.gov

Weekly Report Email Address: weekly.reportcentral@illinois.gov

Procurement Board Email Address: dot.ppbw@illinois.gov

Save

frmCentralOfficeEmailAddress 2/2/2015 10:41:47 AM

Example 82 - Set Email Addresses for Pay Estimates and Weekly Reports

3. Make the necessary changes and then click on "Save". Note – Changes to these email addresses are made on all contracts, they are not contract specific!

Central Office Email Addresses:

Current list of the IDOT Central Office ICORS Email addresses:

- Pay Estimate Email Address: DOT.PAYEST@Illinois.gov
- Weekly Report Email Address: Weekly.ReportCentral@illinois.gov
- Procurement Board Email Address: DOT.PPBW@Illinois.gov

ICORS Help – Assistance

**For ICORS Assistance Contact Your
District ICORS Support Person!**

**Marvin Kessler
at (618)346-3304**

or by Email: Marvin.Kessler@illinois.gov

DO NOT CALL BIP IN SPRINGFIELD!

Links

All of the Links below require Users to log in using either an IDOT User ID or External User ID. If you do not have an User ID, Contact Marvin and he will assist you in acquiring one.

- [District 8 Implementation SharePoint Site](#)
 - [Weekly Activity Report List](#)
 - [District 8 Construction Site](#)
 - [District 8 Contract Support Site](#)
 - [Weekly Report Document Library](#)
 - [Pay Estimate Document Library](#)
 - [Certified Payrolls Document Library](#)
 - [District 8 Materials Site](#)
 - [On-line Request for Assignment Program List](#)
 - [District 8 PCC SharePoint Site](#)
 - [PCC Pour Call-In Log List](#)
 - [District 8 HMA SharePoint Site](#)
 - [District 8 ICORS SharePoint Site](#)
 - [District 8 ICORS Help Request List](#)
 - [District 8 ICORS Shared Doc's \(Manuals, Help Files, Cheat Sheets\)](#)

APPENDIX A - HOMEWORK ASSIGNMENT CONTRACT 2002

Homework: Contract 2002

Add the Course Instructor's email address to receive Weekly Reports and Pay Estimates to document your homework and completion of this course. It is not necessary to print the documentation generated in this exercise. All items must be turned in to receive credit for Class.

Open ICORS and Install the text file for contract 20002.

Setup this Contract using the following information:

Contractor:

- Name: Effingham Roadbuilders, Inc.
- Contractor Number:12345
- Address: 123 W. Wabash
- City: Effingham
- State: IL
- ZIP: 62401
- Phone: (217)342-1234
- Contractor:
 - Name: Altamont Landscaping
 - Contractor Number: 12346
 - Address: 100 S. Main
 - City: Altamont
 - State: IL
 - ZIP: 62411
 - Phone: (618)483-1000
- Contractor.
 - Name: Mason Striping Co.
 - Contractor Number: 12347
 - Address: 500 W. Main
 - City: Mason
 - State: IL
 - ZIP: 62418
 - Phone: (618)555-9876
- Contract Information:
 - County: Effingham
 - Section: RS-1
 - Route: SBI 45
 - District: 02
 - Project Type: Exempt
 - Location: Effingham, IL
 - Resident Name: Enter Your Name
 - Supervisor Name: Enter the Instructor's Name
 - Prime Contractor: Effingham Roadbuilders, Inc.
 - Mystic Number: Leave blank
 - Field Office Phone: Enter Your Current Phone Number
 - Time Limit Type: Working Days
 - Partnered or Non-Partnered: Partnered
 - Consultant Plans: In House
 - Working Days: 25

- Letting Date: 05/01/99
- Award Date: 05/15/99
- Executed Date: 05/26/99
- Add the following information:
 - Subjob: A
 - Job Number: C97-001-95
 - Project Number: NHF(2)
- Scale Information:
 - Tie all weight items to a Dept. of Ag. Scale or a dummy scale if BC-981 quantity.
 - Decal Number: 1234
 - Decal Date; 01/01/99
 - Location; Effingham Roadbuilders plant, Effingham, IL.
 - Tag all items that apply:
 - Agg Bse Cse B
 - Bit Matis Pr Ct
 - Agg Pr Ct
 - Bit Cone Surf Cse
 - D CLI T1
 - Nitrogen fertilizer
 - Phosphorus fertilizer
 - Potassium fertilizer
 - Mulch method I.

Enter the following day by day diary and daily quantity entries and others as described:

Diary Date: 06/01/99 Tuesday **Weather: 50-75, sunny**

- Diary Entry: Effingham Roadbuilders set up field office, set traffic control and removed existing structure. Altamont Landscaping completed all tree removal.
- 2 persons - 8 hrs.
- Controlling Item -Traffic control
- Additional Paragraph in Diary: Begin payment of field office this date.
- Daily Quantities:
 - Effingham Roadbuilders:
 - #70103700 Traf Cont. Comp. 0.25 LS Est
 - Evidence of inspection: As per standard
 - Location: Jobsite*
 - Source of progress doc.: See calculations in traffic control file.
 - Mark "OK to Post"
 - #50100100 Rem. Exist Struct. 1.0 EA Final
 - Evidence of inspection: N/A
 - Location: Jobsite
 - Source of progress doc.: Daily Quantity
 - Mark "OK to Post"
 - Altamont Landscaping:
 - #M2010110 Tree Remov 6-15 26.00 Units Final
 - Evidence of inspection: N/A
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 1
 - Mark "OK to Post"

- #M2010210 Tree Remov over 15 160.00 UNIT Final
- Evidence of inspection: N/A
- Location: Jobsite
- Source of progress doc.: Field Book #1 p. 2
- Mark "OK to Post"

Note: We will use "Jobsite" for all locations in this example contract to save time in data entry. Use the proper location in your actual contracts.

Diary Date: 06/02/99 Wednesday Weather: 60-80, pt sunny

- Diary Entry: Effingham Roadbuilders worked on storm sewer items, completed an estimated 1/2 of earth excavation and embankment quantities.
- 10 persons - 8 hrs.
- Controlling Item - Storm Sewer
- Daily Quantities:
 - Effingham Roadbuilders:
 - #60246705 Med Inlet (604101) SPL 2.0 EA Final
 - Evidence of inspection: Stamped CERTIFIED from approved source.
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 10
 - Mark "OK to Post"
 - #60500090 Rem Inlet Main Flow 2.0 EA Final
 - Evidence of inspection: N/A
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 11
 - Mark "OK to Post"
 - #M2020010 Earth Excavation 15570 CM. Est.
 - Evidence of inspection: N/A Location: Jobsite
 - Source of progress doc.: Estimated 1/2 of BC-981 quantity
 - Mark "OK to Post"
 - #M2050150 Embankment 30 CM Est
 - Evidence of inspection: Letter of acceptance from District Materials
 - Location: Jobsite
 - Source of progress doc.: Estimated 1/2 of BC-981 quantity
 - Mark "OK to Post"

Diary Date: 06/03/99 Thursday Weather: 65-90, pt cloudy

- Diary Entry: Effingham Roadbuilders continued working on storm sewer items, removed curb at existing structure.
- 10 persons - 8 hrs.
- Controlling Item - Storm Sewer
- Daily Quantities
 - Effingham Roadbuilders:
 - #M4402020 Curb Rem 170.00 M Final
 - Evidence of inspection: N/A Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 20
 - Mark "OK to Post"

- #M542B128 RC Pipe Elbow 2.0 EA Final
- Evidence of inspection: Stamped CERTIFIED from approved source
- Location: Jobsite
- Source of progress doc.: Field Book #1 p. 12
- Mark "OK to Post"

- #M5500465 SS CL A 2 600 5.5 M Final
- Evidence of inspection: Stamped CERTIFIED from approved source
- Location: Jobsite
- Source of progress doc.: Field Book #1 p. 13
- Mark "OK to Post"

- #M6021810 ManA1.8DT1FCL 2.0EA Final
- Evidence of inspection: Stamped CERTIFIED from approved source
- Location: Jobsite
- Source of progress doc.: Field Book #1 p. 14
- Mark "OK to Post"

Diary Date: 06/04/99 Friday**Weather: 60-85, rain**

- Diary Entry: No work- rain out. No W.O. charged due to rain.
- 0 persons - 0 hrs.
- Controlling Item - Storm Sewer
- Additional Paragraph - Pay 0.13 cal mo field office. 4days/30 days = 0.13 cal mo.

Since it's raining, we have some time to catch up on paperwork. We need to do a pay estimate, but first we have to make some payment for the field office and traffic control. (Normally pay estimates would be done on the 15th and 30th of each month, but for this project we will do them more often to better illustrate the process).

- Daily Quantities:
 - Effingham Roadbuilders:
 - #67000400 Engr Field Office A 0.13 Cal Mo Est
 - Evidence of inspection: Approved by resident
 - Location: Jobsite
 - Source of progress doc.: See job diary
 - Mark "OK to Post"

 - #70103700 TrafContCompl 0.13LS Est
 - Evidence of inspection: As per standard
 - Location: Jobsite
 - Source of progress doc.: See calculations in traffic control file. (4 days/20 days estimated use • 0.65 = 0.13 L.S.)
 - Mark "OK to Post"

Post all Daily Quantities. (Quantities- Post Quantities - "select all" button -"post" button)
 Check for daily quantities not marked "ok to post".

(Reports-DQ Reports-Quantities Not "OK to Post").

Run Test Estimate and print out- Check & double check w/ at least two others and master copy.

Run pay Estimate- Select Email (When the Email message has been created, delete the Central PayEstimate Email address. The Instructors email address should be in the cc address section. You do not need to print hard copy unless you want one for your class records.

Diary Date: 06/07199 Monday Weather: 65-90, pt cloudy

- It's Monday, first we need to make the diary entries for Saturday and Sunday. (Always 0 W.D. for weekends and holidays)
 - 06/05/99: Saturday 55-75, cloudy – No Work - Controlling Item is the same as Friday
 - 06/06/99: Sunday 60-80, sunny – No Work - Controlling Item is the same as Friday
- Go to Setup Menu- Contract information and enter Start date of 06/01/99. Now create Weekly Report #1. Ending Date: 06/05/99 Est. Completion Date: 06/30/99 (Remember - Weekly Reports always Start on Sunday and end on Saturday. Never skip days in your diary.)
- Use "Calc % Complete" button.
- Press the "Print weekly report" button to preview the report. If ok, close the preview and press the "Email to Central Office" button to create the report email, Click "Yes" and then "Send" to complete the process.
- Print last week's Daily Quantities. Print last week's Diary entries.
- You also got a Material Allowance form BC-49 (Material Allowance Affidavit) in the mail over the weekend. It listed:
 - 32.5 Mton of CA-6 @ \$12/Mton for Agg Sse Cse B and
 - 4 ROW Markers@ \$10/ea on the BC-49.
- Go to Qty Book- Material Allowance menu, start at the top and follow each step down.
 1. Select MATALLOO pay item from drop down menu, use same CCS codes, subjob, etc.
 2. Input affidavits. (BC-49) Remember to include both items.
 3. Conversions are 1 for each item. But remember to tie contract pay item to material from BC-49, not MATALLOO pay item.
 4. Deduct 0 the first time through. Be sure to use "Auto deduct" for each pay item.
 5. BC-131: Preview - Go button - print from preview screen, for test sheet. If test is OK, Hardcopy - Go, to print. Then be sure to click "Post Material Allowance" button. The computer will remind you to print and post before closing!
 6. Close form.
- Diary Entry: Effingham Roadbuilders completed work on earth excavation and embankment.
 - 10 persons - 8 hrs
 - Controlling Item – Embankment
- Daily Quantities:
 - Effingham Roadbuilders:
 - #M2020010 Earth Excavation 15570 CM Final
 - Evidence of inspection: N/A Location: Jobsite
 - Source of progress doc.: Final payment for balance of BC-981
 - Mark "OK to Post"
 - #M12050150 Embankment 30 CM Final
 - Evidence of inspection: Letter of acceptance from District Materials.

- Location: Jobsite
- Source of progress doc.: Final payment for balance of BC-981
- Mark "OK to Post"

Diary Date: 06/08/99 Tuesday Weather: 70-90, sunny

- Diary Entry: Effingham Roadbuilders Poured CL SI Concrete Outlet and Concrete Gutter TA Mod rt. sta. 1+000.
- 8 persons - 8 hrs.
- Controlling Item- Concrete Gutter TA Mod
- Daily Quantities:
 - Effingham Roadbuilders:
 - #M6060010 CL SI Concrete Outlet 4.2 CM Final
 - Evidence of inspection: Plant Report & Tickets
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 30
 - Mark "OK to Post"
 -
 - #M6060270 Cone Gutter TA Mod 775.00 M Final
 - Evidence of inspection: Plant Report&. Tickets
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 31
 - Mark "OK to Post"

Diary Date: 06/09/99 Wednesday Weather: 70-85, Cloudy AM, Rain PM

- Diary Entry: Effingham Roadbuilders set 2 ROW markers rt sta 1+000 and 2+000. Rain out at noon -charge 1/2 WD due to rain.
- 8 persons - 4 hrs.
- Controlling Item - Agg Bse Cse B
- Daily Quantities:
 - Effingham Roadbuilders:
 - #66600105 ROW Markers 2 EA Final
 - Evidence of inspection: LA-15
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 40
 - Mark "OK to Post"

Diary Date: 06/10/99 Thursday Weather: 60-80, sunny

- Diary Entry: Effingham Roadbuilders constructed aggregate base course B.
- 8 person - 8 hrs .
- Controlling Item - Agg Bse Cse B
- Daily Quantities:
 - Effingham Roadbuilders:
 - #M3511010 Agg Bse Cse B 33.0 Mton Final
 - Evidence of inspection: Approved source and shipment tickets.
 - Location: Jobsite
 - Source of progress doc.: Wt Tickets in file
 - Mark "OK to Post"

Diary Date: 06/11/99 Friday**Weather: 65-75, pt sunny**

- Diary Entry: Effingham Roadbuilders removed guardrail at all locations and constructed bit. Shldr. 200mm.
- 10 persons- 8 hrs
- Controlling Item- Guardrail
- Additional Paragraph - Pay 0.25 cal mo field office this date. 7 days/30 days = 0.25 cal mo.

You need to run a Pay Estimate. But before you do that you need to add Daily Quantities for Engr. Field Office and Traffic Control.

- Daily Quantities:
 - Effingham Roadbuilders:
 - #M6320020 SPBGR Rem 101.00 M Final
 - Evidence of inspection: N/A Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 50
 - Mark "OK to Post"
 - #M4820200 Bit Shldr. 200mm 1210.00 SM Final
 - Evidence of inspection: Plant report & tickets
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 60
 - Mark "OK to Post"
 -
 - #67000400 Engr Field Office A 0.25 Cal Mo Est.
 - Evidence of inspection: Approved by resident
 - Location: Jobsite
 - Source of progress doc.: See job diary
 - Mark "OK to Post"
 - #70103700 Traf Cont Compl 0.23 LS Est.
 - Evidence of inspection: .As per standard
 - Location: Jobsite
 - Source of progress doc.: See calculations in traffic control file (7days/20 days est* 0.65 = 0.23 LS)
 - Mark "OK to Post"

Post all quantities.

Check for daily quantities not marked "ok to post". (Reports- DQ Reports- Quantities not "OK to Post").

Go through Material Allowance from the "deduct" procedure down. Make sure to complete all to bottom. Make sure you "Auto deduct" each item and DO NOT print final copy of BC-131 from print preview screen! (Print hardcopy- Go)

Run a Test Estimate-- (Check, Recheck, and Triple check!). Run a Pay Estimate- Diskette, and print a hard copy.

Diary Date: 06/14/99 Monday**Weather: 60-75, sunny**

- First you need to make the Diary entries for the Weekend.
 - Saturday: 06/12/99 50-70, sunny
 - Sunday: 06/13/99 55-75, sunny
- Create Weekly Report #2.
- Print last week's Daily Quantities and Diary entries.
- Diary Entry: Effingham Roadbuilders completed ROW marker installation, constructed Bit Surf Rem Butt Joint, Temp Ramp, Primed and sanded in preparation for paving. Pavement cleaning at force account was also completed today.
- 18 persons- 10 hrs.
- Controlling Item - Bit cone surf cse D
- Daily Quantities:
 - Effingham Roadbuilders:
 - #66600105 Fur Erect ROW Markers 2.0 EA Final
 - Evidence of inspection: LA-15
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 40
 - Mark "OK to Post"

 - #M4060980 Bit Surf Rem Butt Joint 78.0 SM Final
 - Evidence of inspection: N/A Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 70
 - Mark "OK to Post"

 - #M4060990 Temp Ramp 78.0 SM Final
 - Evidence of inspection: Plant report & tickets
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 71
 - Mark "OK to Post"

 - #M4060200 Bit Matis Pr Ct 1.03 Mton Final
 - Evidence of inspection: Bill of lading w/ tested tank indicated.
 - Location: Jobsite
 - Source of progress doc.: see wt tickets and calcs.
 - Mark "OK to Post"

 - #M4060300 Agg Pr Ct 4 Mton Final
 - Evidence of inspection: Appr source & shipment tickets.
 - Location: Jobsite
 - Source of progress doc.: Wt Tickets in file.
 - Mark "OK to Post"
 - Roadbuilders has a crack office team, so you get the force acct bill at the end of the day. Create a new pay item
 - #FRC00001 Pavt Cleaning
 - Units are dollar
 - Unit price is 1.00
 - Quantity is 1023.76
 - Use same CCS and Subjob, FASID codes.

- Note: This item is not an approved item, so do not check the "Approved" box.
- Create Authorization #1, print and submit to the office for signatures.
 - Authorization entry: #1, No letter, Subjob A, Contract Adjustment, Minor Change, use first determination statement from drop down box, Location and Reason is "See attached sheets", Check "new" box, Click mouse under Pay Item Key field to get drop down box and select FRC00001, Category is 02, Quantity is 1023.76, Addition.
 - We will add this pay item Daily quantity to the above list.

NOTE - You can either do the daily quantity the day you check the bill or the day you get the approved authorization back. Both are acceptable, they won't be posted until approved and can be edited if needed, but remain consistent or you could forget to pay for the item.

- #FRC00001 Pavt Cleaning 1023.76 \$ Final
- Evidence of inspection: N/A
- Location: Jobsite
- Source of progress doc.: See force acct bill and BC-635 in file
- Mark "OK to Post"

Diary Date: 06/15199 Tuesday

Weather: 66-76, pt sunny

- Diary Entry: Effingham Roadbuilders constructed Bit Cone Surf Cse D CLI T1 and short term pavt marking.
- 12 persons - 10 hrs
- Controlling Item - Bit cone surf cse D
- Daily Quantities:
 - Effingham Roadbuilders:
 - #M4060820 Bit Con Surf Cse D CLI 382.0 Mton Final
 - Evidence of inspection: Plant report & tickets
 - Location: Jobsite
 - Source of progress doc.: Wt. Tickets in file.
 - Mark "OK to Post"
 - #M7030100 Short Term Pavt Mking 84.00 M Final
 - Evidence of inspection: LA-15
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 80
 - Mark "OK to Post"

You also received an approved copy of Authorization #1 back, but Springfield has changed the pay item code to XXX19700.

Handle this by going to "Resident" from the menu bar and using the drop down box, select "Change unapproved pay items". Then a Dialog Box will appear called "Unapproved Pay Items". Find the record that has the information for FRC00001 and change it to XXX19700. **Note: This will change that pay item on your authorization and daily quantity.**

Now mark all accepted and approve Authorization #1.

Diary Date: 06/16/99 Wednesday Weather: 60-80, pt cloudy

- Diary Entry: Altamont Landscaping planted trees, fertilized, seeded, and mulched CL 4 areas only.
- 4 persons - 8 hrs.
- Controlling Item- Seeding
- Daily Quantities:
 - Altamont Landscaping:
 - #B1002010 Cercis Canadensis 10 1.0 EA Final
 - Evidence of inspection: LA-15
 - • Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 90
 - Mark "OK to Post"

 - #M2500310 Seeding CL 4 0.63 HA Final
 - Evidence of inspection: RE memo & certificate signed by reg. seed technologist.
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 91
 - Mark "OK to Post"

 - #M2500400 Nitrogen Fert Nutr 48 KG Final
 - Evidence of inspection: Guaranteed analysis on bag & RE memo
 - Location: Jobsite
 - Source of progress doc.: Wt. Tickets in seeding file.
 - Mark "OK to Post"

 - #M2500500 Phosphorus Fert Nutr 48 KG Final
 - Evidence of inspection: Guaranteed analysis on bag & RE memo
 - Location: Jobsite
 - Source of progress doc.: Wt. Tickets in seeding file.
 - Mark "OK to Post"

 - #M2500600 Potassium Fert Nutr 48 KG Final
 - Evidence of inspection: Guaranteed analysis on bag & RE memo
 - Location: Jobsite
 - Source of progress doc.: Wt. Tickets in seeding file.
 - Mark "OK to Post"

 - #M2510110 Mulch Method I 0.63 Mton Final
 - Evidence of inspection: RE memo
 - Location: Jobsite
 - Source of progress doc.: Wt. Tickets in seeding file.
 - Mark "OK to Post"

Date: 06/17/99 Thu Weather: 60-85, pt cloudy

- Diary Entry: Altamont Landscaping fertilized, seeded and mulched CL 5 areas only and constructed erosion control blanket.
- 8 persons - 8 hrs

- Controlling Item – Seeding
- Daily Quantities:
 - Altamont Landscaping:
 - #M2510630 Erosion Cont Blanket 4002.0 SM Final
 - Evidence of inspection: LA-15
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 95
 - Mark "OK to Post"
 -
 - #M2500320 Seeding CL 5 0.41 HA Final
 - Evidence of inspection: RE memo & cert signed by reg. seed Tech.
 - Location: Jobsite
 - Source of progress doc.: Field Book #1 p. 96
 - Mark "OK to Post"
 -
 - #M2500400 Nitrogen Fert Nutr 15 KG Final
 - Evidence of inspection: Guaranteed analysis on bag & RE memo
 - Location: Jobsite
 - Source of progress doc.: Wt. Tickets in seeding file.
 - Mark "OK to Post"
 -
 - #M2500500 Phosphorus Fert Nutr 15 KG Final
 - Evidence of inspection: Guaranteed analysis on bag & RE memo
 - Location: Jobsite
 - Source of progress doc.: Wt. Tickets in seeding file.
 - Mark "OK to Post"
 -
 - #M2500600 Potassium Fert Nutr 15 KG Final
 - Evidence of inspection: Guaranteed analysis on bag & RE memo
 - Location: Jobsite
 - Source of progress doc.: Wt. Tickets in seeding file.
 - Mark "OK to Post"
 -
 - #M2510110 Mulch Method I 0.41 Mton Final
 - Evidence of inspection: RE memo
 - Location: Jobsite
 - Source of progress doc.: Wt. Tickets in seeding file.
 - Mark "OK to Post"

Date: 06/18/1999 Fri Weather: 65-90, sunny

- Diary Entry: Mason Striping constructed paint pavement marking line 100mm. Effingham Roadbuilders removed traffic control and field office. Project 99.9% complete pending final inspection and punch list.
- 4 persons- 10 hrs.
- Controlling Item - Pavement Markings
- Additional Paragraph - End payment of field office this date. 6 days/30 days = 0.20 cal. mo.
- Daily Quantities:
 - Mason Striping:
 - #M7800205 Paint Pvt Mk Ln 100 999.0 M Final

- Evidence of inspection: LA-15
- Location: Jobsite
- Source of progress doc: Field Book #1 p. 99
- Mark "OK to Post"
- Effingham Roadbuilders:
 - #67000400 Engr Field Office A 0.20 Cal Mo Final
 - Evidence of inspection: Approved by resident
 - Location: Jobsite
 - Source of progress doc.: Job Diary 6days/30days = 0.20
 - Mark "OK to Post"
 - #70103700 Traf Cont Comp 0.39 LS Final
 - Evidence of inspection: As per standard
 - Location: Jobsite
 - Source of progress doc.: See calculations in traffic control file.
(1.0- prev paid 0.61 = 0.39 LS)
 - Mark "OK to Post"
- Post all Daily Quantities.
- Check for daily quantities not marked "Ok to Post".
- Run the Material Allowance procedure from the "deduct" down to the bottom.
- Preview the Test Estimate - Check before running pay estimate. If ok, then create and send a Pay Estimate.

Daily Diary: 6/21/99 Monday**Weather: 60-75, sunny**

- You need to enter the diary entries for Saturday and Sunday:
 - 06/19/99 Saturday, 55-75, sunny
 - 06/20/99 Sunday: 50-65, sunny
- Create Weekly Report #3,
- Use the "Calculate % Complete" button, but you must overwrite to 99.9%
- Print last week's Daily Quantities and Diary Entries.
- Daily Diary Entry: Field engineer came by today and did the final inspection. No punch list required. Project 100%
- 0 persons- 0 hrs. 0 W.D.
- Controlling Item – Punch list
- Now Final out the Contract and Post any remaining DO's.
- Check for daily quantities not marked "Ok to Post".
- Now you need to create a balancing authorization to balance awarded quantities with as built quantities. Create and send it off to the office. (Authorizations- Balance/Overage).
Note: Be sure Auth Date" is 6/21/99.
- Through the miracle of modern technology, you received Authorization #2 approved the same day. Accept all and approve.
- Run Test Estimate.

Note: After a balancing Authorization, the "Adjusted Total Quantity" Column should equal either the "Completed at Last Report" or "Total Completed to Date" Column for each pay item.

- Run Final Pay Estimate and send to office.
- Input Date Completed, Final Inspection Date and Punch list Date on Contract Information.
- Create the final weekly report (#4). Note you will have to change the % complete field to 100% manually.
- Print remaining Diary entry & Cover Sheet.
- Mark all quantities "Final" by clicking in "Final" box and enter source of documentation of final quantity. (Setup- View- Quantity Book Pages) You will have to look at your daily quantities and/or use Construction Manual to determine the proper source.

Note: Only do the first five items, you might remember that we said that you might have to print out your Quantity Book a few times throughout the job, this would be a good time to print out the first five items.

Print the Quantity Book and the Cover Sheet.

Note: To include index, you cannot print out of print preview screen.

Note: Only do the first five items.

- Print the following Reports:
 - Scale Reports;
 - Net cost of section report
 - Cost Breakdown Summary
 - Print Cost Breakdown.
- Create your final backup in ICORS and send to the District Office per the instructions.
- **Your job is now complete!**

APPENDIX B – IDOT DEPARTMENTAL ORDER 8-2



Illinois Department of Transportation

Departmental Orders

ORDER 8-2

Effective Date: September 10, 2010
Scheduled Review Date: September 10, 2012

INFORMATION TECHNOLOGY RESOURCES USAGE CODE

1. ORDER

It is the policy of the Department of Transportation to authorize and use Information Technology (IT) resources for business purpose only. All state IT resources must be protected from accidental or unauthorized access, use, disclosure, modification, or destruction by employees, contractors, or any individual whether on state or non-state provided equipment. The Bureau of Information Processing (BIP) is responsible for establishing, directing and enforcing IT resource policies and procedures for the department.

2. PURPOSE

The purpose of this order is to provide information technology resources for operations that affect day-to-day business functions and impact public safety and security. This order provides guidelines for use of and access to department IT resources that will maximize the security of those resources and ensure compliance with applicable laws and policies.

This order covers the general use of IT resources. Detailed information technology resource policies and procedures issued by BIP are subject to this order. The BIP Policies and Procedures online manual is posted on the IDOT intranet at <https://insideidot.portal.illinois.gov/SiteDirectory/idotpolicies/default.aspx> and is accessible to all IT resource users.

On suspicion that a security breach (or any violation of this order) has occurred, the findings are to be reported to the Bureau Chief of BIP to determine if the breach is significant enough to warrant further investigation. If it is determined that an employee has used IT resources in violation of this order, the employee will be subject to appropriate disciplinary action for misuse of state property, up to and including discharge. Noncompliance with this order may also result in monetary charges being assessed where appropriate.

3. DEFINITIONS

A. Information Technology Resources. The department's entire computer network. Specifically, *information technology resources* include, but are not limited to host computers, file servers, application servers, communication servers, mail servers, fax servers, web servers, workstations, stand-alone computers, laptops, personal digital assistants, software, applications, data files,

and all internal and external computer and communications networks (for example, Internet, commercial online services, value-added networks, e-mail systems) that may be accessed directly or indirectly from the department's computer network.

- B. Users.** All employees, independent contractors, consultants, temporary workers, and other persons or entities who use department's IT resources. BIP personnel and designated information technology services staff are exempted from certain restrictions while performing assigned duties.

4. GUIDELINES FOR IMPLEMENTATION

Detailed policies and procedures for these guidelines are defined in the [BIP Policies and Procedures online manual](#).

A. Information Access

- 1) Each user is authorized to access information that is required to do his or her job. Unauthorized access to any other information is strictly prohibited.
- 2) All users must safeguard all department information.
- 3) Access to IT resources will be immediately deactivated when employment or contract is terminated or rights are withdrawn for any reason.

B. Personal Privacy

- 1) *No expectation of personal privacy.*

The department's IT resources and access accounts are made available to users to assist them in performing their job duties. Users do not have an expectation of personal privacy in anything they search, access, create, store, send, or receive on or from the department's IT resources as defined in paragraph 3(A).

Use of passwords to gain access to the department's IT resources as defined in paragraph 3(A), or to encode particular files or messages, does not imply that users have an expectation of personal privacy or confidentiality in the material they search, access, create, store, send or receive on or from the department's IT resources.

- 2) *Waiver of personal privacy rights.*

Users expressly waive any right of personal privacy or expectation of personal privacy in anything they search, access, create, store, send or receive on or from the department's IT resources. Users consent to allowing personnel selected at the sole discretion of the department to access and review all materials users search, access, create, store, send or receive on or from the department's IT resources as defined in paragraph 3(A).

C. Security

1) Passwords

Access to department IT resources is protected by unique user accounts and restricted by password control.

Users are responsible for:

- all transactions performed on or through the department's IT resources as defined in paragraph 3(A) using their password;
- creating and changing their password(s) per the policies and procedures;
- safeguarding their password(s) by NOT printing, posting or storing them online, or giving them to others; and,
- notifying management if they suspect their password has been compromised.

2) Hardware Security

Users who are assigned information technology hardware resources such as desktop computers, laptop computers, personal digital assistants, cell phones, pagers, etc., must exercise responsible care of these resources.

Users are responsible for:

- protecting hardware assets from loss, theft or damage per the policies and procedures;
- immediately notifying management of any loss, theft or damage and fully cooperating with any official investigation;
- using hardware assets in accordance with this order and the [BIP Policies and Procedures online manual](#); and,
- returning hardware assets prior to separation, relocation or reassignment.

3) Data Security

Department data is proprietary and must be protected from unauthorized access.

Users are responsible for:

- ensuring private, sensitive information such as Social Security Numbers or FEIN is not stored on portable IT resources (i.e. laptops, personal digital assistants, etc.) unless authorized and proper procedures for securing the hardware are utilized;

- ensuring financial information, including credit card numbers and bank information, is not stored on portable IT resources (i.e. laptops, personal digital assistants, etc.) unless authorized and proper procedures for securing the hardware are utilized;
- ensuring protected health information, including health records and medical information, is not stored on portable IT resources (i.e. laptops, personal digital assistants, etc.) unless authorized and proper procedures for securing the hardware are utilized; and,
- locking or restarting their computers when away from their desks.

4) Viruses, Network and Data Intrusion

Users are responsible for ensuring that use of outside computers and networks, such as the Internet, does not compromise the security and integrity of the department's information technology resources.

This duty includes taking reasonable precautions to prevent intruders from accessing the department's network, or department mobile computing or stand-alone computing devices, and to prevent the introduction and spread of computer viruses and other forms of malware.

Users are responsible for:

- accessing the Internet through the department's Internet firewall when possible;
- notifying management immediately of inappropriate Internet pop-ups or access to inappropriate Internet sites;
- notifying management immediately of e-mail chain letters, spam, and other inappropriate uses of the department's e-mail;
- scanning all digital media from an external source for viruses and other forms or malware before transferring onto department information technology resources; and,
- notifying management immediately of suspected virus/malware infection.

5) Data Backups

All data and development files must be backed up in a timely manner. Data and files stored on local drives, such as C:\, are not backed up by infrastructure personnel. Data and files stored on network drives, such as P:\ or S:\, are backed up nightly by infrastructure personnel.

Users are responsible for:

- ensuring data and files are backed up by copying to a network drive or backing up to external media such as disks or flash drives; and,
- ensuring all records (according to the IDOT [Records Management Manual](#)) are stored on a network drive, such as the P:\ or S:\ or a SharePoint site.

D. Communication

1) Proprietary and Confidential Information

Sending, transmitting, posting, or otherwise disseminating proprietary department data or other information identified as confidential without authorization is strictly prohibited.

Users are responsible for:

- exercising reasonable judgment to maintain confidentiality when sending proprietary or confidential information to shared devices such as printers and facsimile machines;
- shredding hard copy documents that contain proprietary or confidential information, such as computer code or sensitive personal information like social security numbers, FEIN or TIN numbers, medical information, financial information or any other personal/ confidential information prior to disposal per Departmental Orders [6-10: Order on Personal Employee and Private Entity Confidential Information](#) and [9-2: Records Management](#);
- rendering unreadable any digital storage device (i.e., floppy disks, CD's, magnetic tape, DVD's, etc.) that at any time contained this type of confidential information prior to disposal per the defined procedures; and,
- notifying management immediately of any suspected breach of proprietary or confidential information.

2) E-mail Use

The use of department e-mail is limited to official business. Other use of department e-mail will be considered reasonable if:

- it does not adversely affect the performance of official duties by the employee or the employee's organization, and;
- it is of reasonable duration and frequency.

Users must keep in mind that e-mail messages can, at any time, be entered into the public domain by news media and Internet postings. If publishing an e-mail message would harm or embarrass the department

or any department personnel then the message should not be sent.

E-mail messages containing chain letters, cartoons, games, non-work related photographs and advertisements for non-work related functions or events are not considered reasonable use of the e-mail system.

Access to personal e-mail servers (AOL, Yahoo, HotMail, etc.) through department information technology resources is generally prohibited unless it falls within the reasonable clauses outlined within 4.D.2 above.

Users are responsible for:

- exercising professionalism in all e-mail correspondence;
- including a confidentiality statement with e-mail that contains confidential or sensitive information, especially when transmitted outside the department, such as:

PRIVILEGED & CONFIDENTIALITY NOTICE: This e-mail and any attachments is intended only for the use of the individual or entity above. If you are not the named or intended recipient, you are hereby notified that any disclosure, copying, distribution, or the taking of any action in reliance on the contents of such information is strictly prohibited. If you have received this transmission in error, please immediately notify the sender by telephone to arrange for the secure return of the document.

- ensuring e-mail messages do not contain language or references that is or would be perceived by a reasonable person to be offensive or harassing, including but not limited to; disparagement of others based on their race, national origin, sex, sexual orientation, age, ability, religion, political beliefs, etc. This is strictly prohibited, and the employee will be subject to appropriate disciplinary action, up to and including discharge; and,
- ensuring email messages do not contain threatening language to subordinates/managements/peers/others. This is strictly prohibited, and the employee will be subject to appropriate disciplinary action, up to and including discharge.

3) E-mail Record Retention

E-mail messages that contain records are subject to management under the office-wide records management function as mandated by the [State Records Act \(5 ILCS 160\)](#). Employees have the same responsibilities in managing e-mail records as they have in managing paper, microfilm or other digital-based recordkeeping systems. E-mail messages include both the message transmitted and any files attached to and transmitted with a message. E-mail messages also include both messages received by an employee as well as copies of messages sent by the employee in

circumstances where the employee would retain a copy of that message if a different means of delivering the message had been utilized.

Users are responsible for:

- proper identification and handling of records, according to the IDOT [Records Management Manual](#) and [Record Management Tools](#);
- contacting the [departmental records officer](#) if unclear on record identification,;
- ensuring records are retained until a release is communicated when records pertain to an audit/litigation hold.

4) Attribution Information

Attribution information such as "From:" and "Date:" is part of the official communication record. Altering the "From:" line, "Date" line, or any other attribution-of-origin information in e-mail messages, Intranet or Internet postings is strictly prohibited. Anonymous or pseudonymous electronic communications are also strictly prohibited.

Users are responsible for:

- ensuring attribution information of incoming and outgoing electronic communications is accurate and complete; and,
- notifying management immediately of any unauthorized changes in attribution information on any incoming or outgoing electronic communication.

E. Internet

1) Viewing Web Sites

The Internet is a valuable source of information and research. Many web pages, however, have the potential to include inappropriate material. Innocuous search requests may lead to sites with offensive content, or inappropriate pop-ups may display.

Internet use is monitored and tracked. Viewing web sites with inappropriate content is strictly prohibited.

Users are responsible for:

- notifying management immediately of accidental access to inappropriate sites or pop-ups, including how it was accessed and the URL if possible.

2) Downloading

Downloading any software, including freeware, shareware, demo programs, training programs, etc., and any software upgrades or patches from the Internet is strictly prohibited. Downloading documents, clip art, templates, and other non-executable files from the Internet requires prior written authorization from BIP.

Users are responsible for:

- requesting Internet download approval from their manager/supervisor;
- downloading Internet files only after receiving written authorization; and,
- scanning all material downloaded from the Internet for viruses and other malware before transferring onto department IT resources.

3) Prohibited Uses

Internet usage is monitored and tracked. Internet use that does not pertain to official business will be considered reasonable if:

- it does not adversely affect the performance of official duties by the employee or the employee's office/bureau;
- it is of reasonable duration and frequency; and,
- the prohibited guidelines below are followed.

IDOT Internet users are prohibited from:

- sending or requesting information that violates state and/or federal laws;
- distributing non-business related advertising;
- propagating computer worms, viruses, or any other form of malware; and,
- attempting to make unauthorized entry into any other network node (hacking).

Users are responsible for:

- reporting immediately any accidental or intentional Internet use violations to their manager/supervisor.

4) Accessing the Internet

Access to the Internet outside the proxy server using the department's information technology resources is restricted. However, the department

recognizes the value of Internet resources in performing job duties and grants Internet access for specific, job-related purposes.

Users are responsible for:

- requesting approval from their manager/supervisor for Internet access outside the proxy server;
- providing the specific, job-related reasons for Internet access, including specific web sites, in their request;
- accessing the Internet through the department's Internet firewall when possible; and,
- reporting immediately any accidental or intentional Internet use violations to their manager/supervisor.

F. Technical Support

Technical support encompasses the support of all department hardware, software and applications.

- 1) Hardware support includes moving hardware (between and within workspaces), ensuring proper hookup of relocated components and investigating computer or printer malfunctions, etc.
- 2) Software support includes software installation, analysis and correction of errors, assignment of network IDs and passwords, etc.
- 3) Application support includes assistance with changes to application permissions, either developed or administered by BIP.

All technical support must be requested through the designated channels outlined in the BIP Policies and Procedures online manual at <https://insideidot.portal.illinois.gov/SiteDirectory/idotpolicies/default.aspx>. Users requesting application support directly from BIP personnel will be redirected to the designated channel, which could result in a delayed response.

Users are responsible for:

- 1) requesting technical support using the designated channel;
- 2) providing required information as accurately and completely as possible;
- 3) ensuring requested support is completed satisfactorily;
- 4) ensuring only authorized CMS personnel perform hardware support and BIP personnel perform software and application support; and,
- 5) BIP staff are responsible for ensuring support needs are requested via the designated channel with the appropriate approval.

G. Compliance with Applicable Laws and Licenses

1) Inappropriate or Unlawful Material

Material that is fraudulent, sexually explicit, profane, obscene, defamatory; or that is intended to harass, embarrass or intimidate; or that is unlawful or otherwise determined by the department to be inappropriate shall not be sent by e-mail or other form of electronic communication (such as bulletin board systems, newsgroups, chat groups, etc.) or displayed on or stored in department IT resources.

Users are responsible for:

- ensuring information they post or transmit is truthful, accurate and lawful; and,
- notifying their manager/supervisor immediately if they receive or encounter inappropriate or unlawful material.

2) Licenses, Software and Intellectual Property

- Applications and software loaded on the department's IT resources or in the department's software inventory may not be:
- installed or copied for use on home computers;
- installed or copied for use by independent contractors of the department or by any firm or individual unless specifically authorized through an official department contract or agreement;
- installed on any department IT resource except by authorized personnel;
- modified, revised, transformed, recast, or adapted unless specifically authorized through an official department contract or agreement; and,
- reverse-engineered, disassembled or decompiled without written authorization.

Users are responsible for:

- complying with all software licenses, copyrights and all other state, federal and international laws governing intellectual property and online activities;
- protecting department proprietary data and intellectual property; and,
- notifying their manager/supervisor immediately of any unlawful activities regarding licenses, software and intellectual property.

5. RESPONSIBILITIES

The following outlines the individual and office responsibilities to ensure compliance with the provisions of this order.

A. User Responsibilities

Users of department IT resources are responsible for:

- 1) complying with the guidelines in this order and reviewing the material within the [Information Technology Security Awareness Program](#);
- 2) providing accurate and complete information when addressing department IT issues; and,
- 3) reporting any suspicion of a security breach or violation of this order to their manager/supervisor and/or the Bureau Chief of BIP in order to determine if the breach is significant enough to warrant further investigation.

B. Manager/Supervisor Responsibilities

Department managers and supervisors are responsible for:

- 1) ensuring IT resource users in their areas know how to access the [Information Technology Security Awareness Program](#);
- 2) ensuring that all users have access to the IT resources needed to perform their job duties;
- 3) ensuring users have read and understand the content of this order;
- 4) ensuring that all users understand their obligation to protect IT resources;
- 5) ensuring application account access is revoked upon transfer or job duty changes as needed;
- 6) ensuring network and application account access is revoked upon separation from the department;
- 7) ensuring assigned hardware is collected upon separation from the department;
- 8) reporting any suspicion of a security breach or violation of this order to the Bureau Chief of Information Processing in order to determine if the breach is significant enough to warrant further investigation; and,
- 9) initiating corrective action as needed.

C. BIP Responsibilities

BIP managers and personnel are responsible for:

- 1) maintaining user confidence in availability, reliability, and productivity of department IT resources for the purposes set forth in this order,
- 2) ensuring the integrity of the information technology environment; and,
- 3) ensuring support needs are requested via the designated channel with the appropriate approval.

6. ACCESSIBILITY

A. LOCATION

Electronic versions of this order are located at the [Policy & Research Center](#) site on InsideIDOT, the department's internal website.

B. COPIES

Hard copies of this order may be obtained by contacting the Bureau of Business Services' (BoBS), Quality and Document Management Services Section.

C. ARCHIVES & REVISION HISTORY

Archived versions of this order and its revision history may be examined by contacting BoBS' Quality and Document Management Services Section.

CLOSING NOTICE

Supersedes: Departmental Order 8-2: Information Technology;
Effective: June 15, 2009.

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