

HiCAMS User Guide

Chapter 2: Contract Maintenance

Section 8: Review Work Items

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Revision History

Comments or concerns with this document should be directed to the NCDOT Construction Unit at 919-707-2400.

Date	Version	Description	Author
September 2008	1.0	Initial version	Tracy Johnson
October 2013	2.0	Updated document	Marie Novello

About Work Items

Design Build refers to the project delivery method that combines construction and preconstruction services into one contract. Design-Build may combine into a single contract the preconstruction, construction, construction engineering, inspection requirements and testing requirements for a project.

All activities are still performed in accordance with standard North Carolina Department of Transportation (NCDOT) criteria, specifications and contract administration practices.

Typically, Design-Build projects will be paid for on a lump sum basis for the entire project. In this case, partial payments are made based on the progress of the work. The RFP will typically require that the Team submit a Schedule of Values for all major elements of the Contract to assist in determining a proper payment schedule.

In addition, per Section 106 of the Division One Standard Special Provisions included in the contract

Prior to beginning construction, the Design-Build Team shall provide a Table of Quantities.

The Table of Quantities is "a listing of Work Items (corresponding to the items in the Trns*port pay item list) that contributes to a project completion. The table shall include estimate quantities for each work item."

Once the Table of Quantities is obtained from the Design Build Team, the Work Item list can be entered into HiCAMS.

By assigning Materials to Work Items, and tracking Work Accomplished, a more accurate determination of materials quantities required throughout the life of the project is possible.

For additional information on Work Items handling, please contact the Construction Unit at 919-707-2400 or Materials and Tests Unit at 919-329-4200.

Entering Work Items

After reviewing the Contractor's Table of Quantities for completeness, the Contract Administrator enters the Work Items in HiCAMS.

To work with the Review Work Items window, go to **Functions > Contract Maintenance > Review Work Items**. The Review Work Items window opens.

Adding a Standard Pay Item

Step 1: Enter the Contract Number to which you wish to add Work Items.

Note: For information on ways to enter your contract number, see the User Guide "Getting Started" in the User Guides section of the HiCAMS home page.

Step 2: Select the Line Item to which you are adding the Work Items by either typing the Line item number in or selecting it from the dropdown list.

An example of the Review Work Items window appears below:

HiCAMS - [testcontb]

File Edit Functions Inquiries References Admin Tools Window Help

Review Work Items (C202933)

Contract: C202933 Contractor: BLYTHE CONSTRUCTION, INC. Status: Active

Description (nickname): SALEM CREEK CONNECTOR (2013-2015)

Line Item: 1 DESIGN AND CONSTRUCTION Work Item Status: Verified

UOM: Lump Sum

Row	Line Item	Work Item	Section	Pay Item Number	Description	UOM	Plan Quantity
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Work Accomplished Materials History

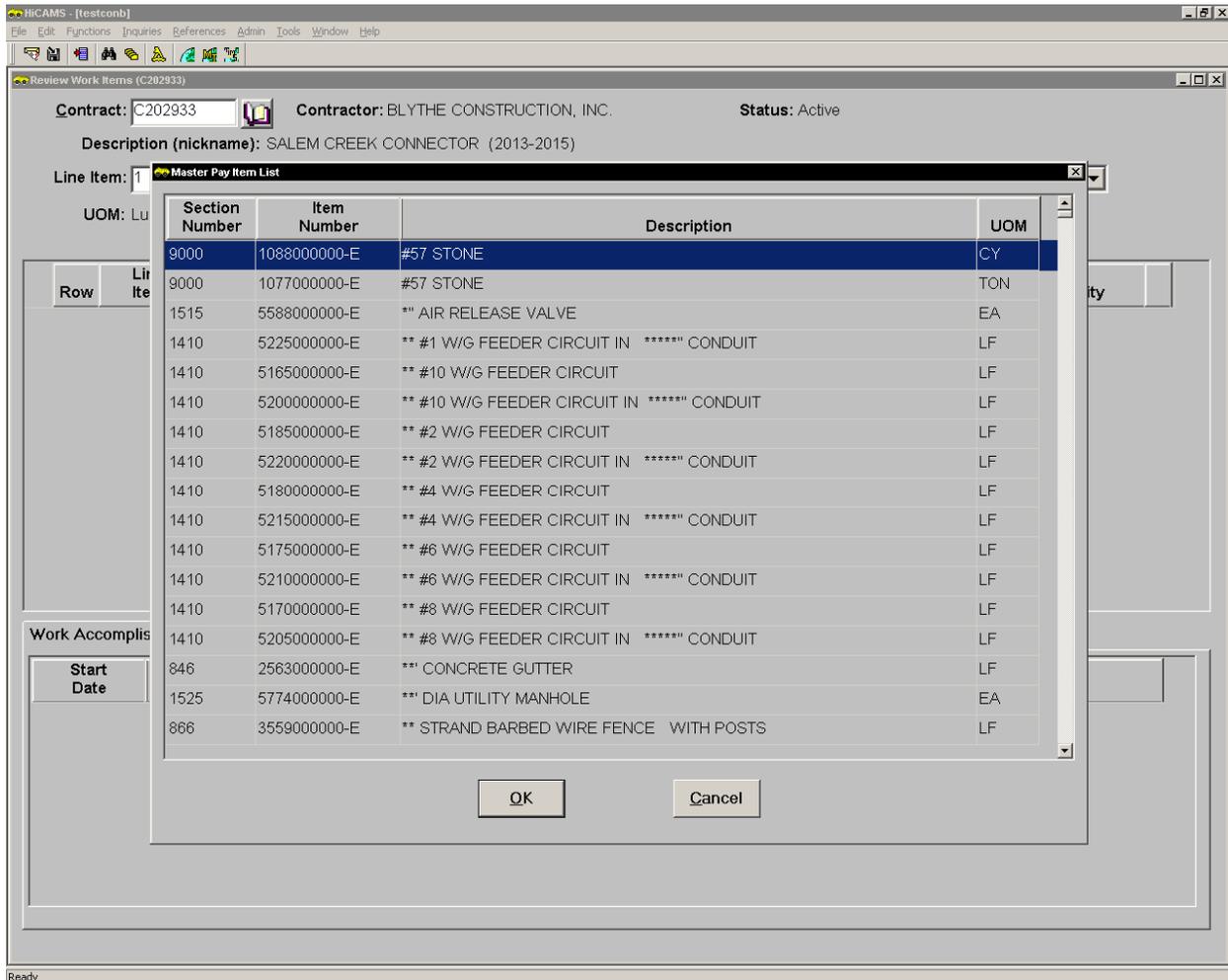
Start Date	End Date	Quantity	Quantity to Date	Comment
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Ready

If Work Items had already been added to the Contract Line Item, they would show in the upper grid.

Note: The Work Item status defaults to Verified. The other status is Void. Verified Work Items are available in other HiCAMS modules. Voided Work Items are not.

Step 3: To add a Work Item, click on the Insert icon in the toolbar, or hit the Insert key on the keyboard. The Master Pay Item Selection window opens. An example of this window is displayed below.



When it opens, the Master Pay Item List is sorted alphabetically by Description. The grid columns can be re-sorted by clicking on the headers. To put the rows in order by Item Number, click on the words Item Number. Similarly, clicking on Section Number or UOM will sort those columns.

Step 4: Select the Pay Items that correspond to the Work Items listed in the Table of Values. Click OK to add it to the Contract.

Note: It is possible to select multiple line items using either Shift-Select or CTRL-Select.

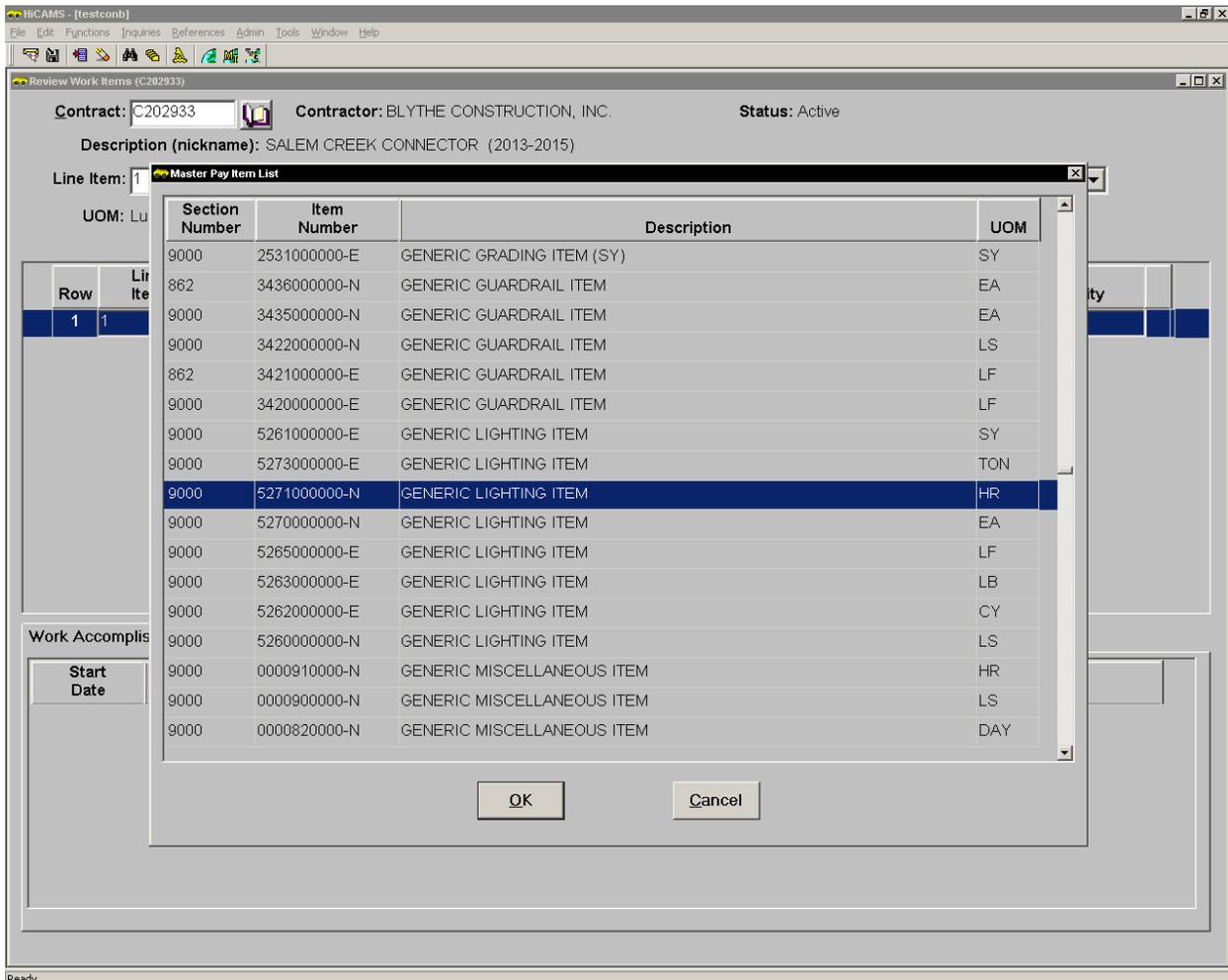
The order in which the Work Items are added is the order they will be numbered. It may be prudent to spend some time with the contractor's Table of Values and resort it in Pay Item Number order so that it more closely resembles a Bid-Build contract order.

- Step 5:** Enter the Plan Quantity of work as per the Table of Values. This quantity can be updated throughout the life of the project.
- Step 6:** Save.
- Step 7:** Follow the same process to enter additional Work Items. Additional Work Items can be added throughout the life of the project.

Adding a Generic Pay Item

To add a Work Item List that is not on the Standard Master Pay Items list, use a Generic Pay Item.

- Step 1:** To add a Generic Work Item, click the Insert icon. The Master Pay Item Selection window opens.
- Step 2:** Find the Generic Pay Items with the correct category (Guardrail, Landscape, Lighting, Utility, &c.) and select the one that has the Unit of Measure that matches the Work Item (LF, Ton, SY, &c.). An example of part of the Generic Pay Items selection window is displayed below.



- Step 3:** Click the OK button and the Work Item is added to the grid.
- Step 4:** Click in the Description Field and add the Work Item description supplied by the contractor.

Step 5: Enter the Quantity and Save.

An example of a Generic Work Item with the Description updated is shown below.

The screenshot shows the 'Review Work Items' window in the HICAMS software. The window title is 'Review Work Items (C202933)'. The contract number is 'C202933', the contractor is 'BLYTHE CONSTRUCTION, INC.', and the status is 'Active'. The description is 'SALEM CREEK CONNECTOR (2013-2015)'. The line item is '1' with the description 'DESIGN AND CONSTRUCTION' and a 'Work Item Status' of 'Verified'. The UOM is 'Lump Sum'.

Row	Line Item	Work Item	Section	Pay Item Number	Description	UOM	Plan Quantity
1	1		800	0000100000-N	MOBILIZATION	LS	1.000
2	1		9000	5271000000-N	GENERIC LIGHTING ITEM - PORTABLE POWER PLANT	HR	75.000

The Description can be updated throughout the life of the contract.

Deleting or Voiding a Work Item

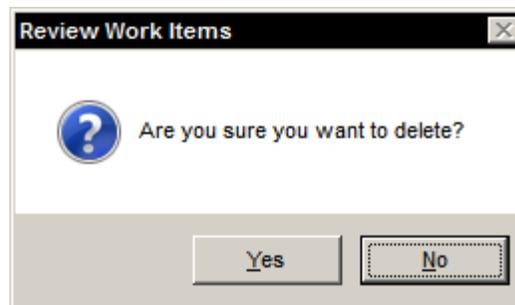
If the Work Item was entered in error, and it has not been Saved, hit the **Delete** button (in the toolbar) and it will be removed.

If the record has been Saved, use the **Void** button (in the toolbar) to remove the effect of the entered record.

Step 1: Select the record entered in error.

Step 2: Click the Delete button . If the delete button is not available, go to Step 5.

Step 3: When the "Are you sure you want to Delete?" message opens, click Yes if you want to delete the record.



Step 4: If the record has already been Saved, the Delete button will not appear. The Void button will appear instead.

Step 5: Click on the Void button .

Step 6: The Void Comment box opens.

Void Comment [X]

You are about to Void a record. A record once voided cannot be updated. All changes will be saved after Void.

Password:

Comment:

- Step 7:** Enter your HiCAMS password in the Password field and type a comment in the Comment field. The comment should provide enough information that the reason the record was voided is self explanatory. A comment such as "Entered on the wrong Contract" is better than simply stating "Error".
- Step 8:** Click OK. The Work Item status will change from Verified to Void.
- Step 9:** Save the record to lock in the Void action.

Note: *If the Void action was taken in error, do not Save. Close the window and when it is reopened, the Work Item will still be Verified.*

Window Definitions - Review Work Items

To work with the Review Work Items window, go to **Functions > Contract Maintenance > Review Work Items**. The Review Work Items window opens. Enter the Contract Number.

Note: For information on ways to enter your contract number, see the User Guide "Getting Started" in the User Guides section of the HiCAMS home page.

Below is an example of the Review Work Items window for contract C202383.

Contract: C202383 **Contractor:** FLATIRON - LANE, A JOINT VENTURE **Status:** Active
Description (nickname): YADKIN RIVER BRIDGE I-2304AC
Line Item: 1 **DESIGN AND CONSTRUCTION** **Work Item Status:** Verified
UOM: Lump Sum

Row	Line Item	Work Item	Section	Pay Item Number	Description	UOM	Plan Quantity
61	1	102	9000	8834000000-N	NOISE WALL	EA	494.000
62	1	103	501	1066000000-E	LIME FOR LIME TREATED SOIL	TON	3,000.000
63	1	104	501	1044000000-E	LIME TRTD SOIL (SLURRY)	SY	198,400.000
64	1	105	510	1110000000-E	STABILIZER AGGREGATE	TON	500.000
65	1	106	520	1121000000-E	AGGREGATE BASE COURSE	TON	42,000.000
66	1	107	542	1187000000-E	PC FOR SOIL CEMENT BASE	TON	2,671.440
67	1	108	542	1176000000-E	SOIL CEMENT BASE	SY	49,600.000
68	1	109	610	1525000000-E	ASP CONC SURF CRS SF9.5A	TON	17,280.000
69	1	110	610	1523000000-E	ASP CONC SURF CRS S9.5C	TON	1,500.000
70	1	111	610	1519000000-E	ASP CONC SURF CRS S9.5B	TON	17,800.000

Work Accomplished | Materials | History

Start Date	End Date	Quantity	Quantity to Date	Comment
11/08/2012	01/07/2013	2,272.200	6,525.300	
08/08/2012	11/07/2012	1,499.260	4,253.100	
05/08/2012	08/07/2012	904.910	2,753.840	
04/08/2012	05/07/2012	0.000	1,848.930	
03/08/2012	04/07/2012	0.000	1,848.930	

Column Definitions for the Review Work Items Window

Row: A number assigned by HiCAMS. Used to identify those rows which cannot be saved.

Line Item: The Contract Line Item associated with the Work Item.

Work Item: The sequential number assigned by HiCAMS as Work Items are entered into the system.

Section: The section of the Standard Specifications for Roads and Structures (SSRS) that specifies the Pay Item requirements

Description: The Pay Item description specified in the SSRS.

UOM: The Unit of Measure for the Pay Item as specified in the SSRS.

Plan Quantity: The amount of work estimated to be performed on the Pay Item per the Contractor's Table of Values. This number can be updated throughout the life of the contract.

Information about the Review Work Items Tabs

The information displayed on the Tabs is for the row highlighted in the Review Work Items Grid. All information on the Tabs is Read Only.

Work Accomplished Tab

Start Date: The Work Period start date from the Review Work Accomplished window. This date should be the same as the Estimate From Date.

End Date: The Work Period end date from the Review Work Accomplished window. This date should be the same as the Estimate Thru Date.

Quantity: Displays the quantity of work recorded in the Work Accomplished window for this Work Item for each Work Period.

Quantity to Date: The sum of the Quantity and the Previous Work Period's Quantity to Date.

Comment: Displays any comments associated with the work period.

Materials Tab

Below is an example of the Materials Tab for Work Item 107 on Line Item 1 for contract C202383.

Material	Master Conv Unknown	Conversion Factor	Substitution Group	Quantity	Unit of Measure	How Received	Criticality
Cement, Portland, Type I	<input type="checkbox"/>	1.000		2,671.440	Tons	Ticket	Critical

Material: The various substances assigned to this Contract Line Item to be incorporated into the Project during its construction. The Material is assigned to the Work Item using the Review Contract BOM function.

Master Conv Unknown: If this check box is checked, it indicates that the Master Bill of Materials cannot set the Conversion Factor for this Material. It must be entered by the user based on Contract Specific information.

Conversion Factor: Displays the current Conversion factor. The conversion factor defines how many Material Units are required for each Line Item Unit.

Substitution Group: Identifies Materials that can be used in place of each other. When several materials can be used for the same purpose on a Line Item, a Substitution Group is created.

Quantity: The quantity column displays the calculated quantity of Material needed if the Bid Quantity amount of work is done.

Unit of Measure: This is the Unit of Measure associated with the Material. It may or may not be the same as the Line Item Unit of Measure.

How Received: The Contract Tracking function that updates the Received Quantity for Project Certification. Possible functions include Material Receipt, Ticket, or Not Received.

Criticality: The Minimum Sampling Guide Project Certification Criticality code. The MSG Project Certification Criticality Codes are Critical, Non-Critical and Minor.

History Tab

Below is an example of the History Tab for Work Item 107 on Line Item 1 for contract C202383.

Action	Action Date	Who	Comment
Create	11/11/2010 5:07:00 PM	P. Kelly Seitz, PE	
Modify	06/17/2011 10:02:00 AM	Richard Haff	Quantity changed from 990.000 to 1100.000
Modify	02/02/2012 7:43:00 AM	P. Kelly Seitz, PE	Quantity changed from 1100.000 to 2671.440

Action: Shows what was done to the Work Item. Actions include Create, Modify, and Void.

Action Date: The date that the action was set in HiCAMS. This date and time are system generated.

Who: The display name of the person who took the action.

Comment: Records the changes made to the plan quantity.