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COMMON FUNCTIONS AND NAVIGATION

TYPICAL ECMS SCREEN LAYOUT
The elements of a typical ECMS screen are described below. (See screens on following pages)

ECMS BANNER –

LOGOUT HYPERLINK - Appears in far right corner of ECMS Banner (after you are logged in to ECMS)

CURRENT USER HYPERLINK - Current User Name appears in far right corner of ECMS Banner

MENU BAR - Replaces navigation bar on left – now located at top of screen, used to navigate between functional areas

HOME/SITE INDEX/HELP HYPERLINKS - Hyperlinks appear in far left corner of ECMS Banner. Clicking on:
  - Home hyperlink from anywhere in ECMS returns you to the ECMS Home Page
  - Site Map hyperlink displays an index of ECMS pages divided by sections with hyperlinks for quick-jump capability.
  - Help hyperlink displays a listing of Help topics and sub-topics.

TOOLBAR - Displays buttons for most common operations on the current screen

MESSAGE AREA - Replaces most pop-up messages - Displays all informational, warnings and error messages

SCREEN TITLE - Displays name of current screen

COMMON HEADERS - Provide common information and hyperlinks to other areas of ECMS as follows:
  - Project hyperlink takes you to main screen with more information (just one click away)
  - Quick jump capability by changing project number and clicking the Go button

SECTION HEADINGS - Screens are divided into sections and sub-sections... Section and sub-section headings contain buttons or hyperlinks to create or edit section data.

REQUIRED FIELDS - Required fields denoted with a flag 📂 icon
**SCREEN ELEMENTS**

**ECMS**

**ECMS BANNER**

Includes Home Site Index and Help hyperlinks, but no logout hyperlink.

**NAVIGATION BAR**

Used to navigate to specific screens by clicking on a menu option, then on a sub-menu option.

**EMCS II**

**ECMS BANNER**

The ECMS banner always appears at the top of the screen. It contains links to the ECMS Home Page, Site Index and Help. It also contains a logout hyperlink which only appears after you have logged into ECMS.

**MENU BAR (REPLACES NAVIGATION BAR)**

Clicking on a sub-menu option, takes you to a specific screen.

**ECMS Banner**

The Menu Bar is displayed near the top of the ECMS Home Page. When you click on one of the menu bar options, a sub-menu is displayed.
SCREEN ELEMENTS

ECMS

FUNCTION BUTTONS
Common function buttons appear at the bottom of screen (for example, Back, Save and Save & Exit).

Back
Save

POP-UP MESSAGES
Pop-up message appears, click OK.

Information
080005 - The information was saved successfully.

OK

EMCS II

TOOLBAR (REPLACES COMMON FUNCTION BUTTONS AT BOTTOM OF SCREEN)

The toolbar is displayed immediately under the menu bar and displays buttons for most common functions (for example, the Save and Save & Exit buttons) on the current screen.

MESSAGE AREA - (REPLACES MOST POP-UP MESSAGES)

Confirmation and Error Messages display in the message area at the top of the screen under the Menu Bar.

Error messages display with an X next to the message and appear in red and bold.

Confirmation messages display with an informational icon next to the message and appear in black.
SCREEN ELEMENTS

ECMS

SCREEN TITLE

**My ECMS Projects**

Appears at top of the screen displaying name of current screen.

PROJECT HEADER

Appears at top of most screens with same quick jump capability.

EMCS II

SCREEN TITLE

The screen title appears near the top of the screen and displays the name of the current screen.

COMMON HEADERS

Common headers appear near the top of the screen and provide common information and hyperlinks to other areas of ECMS. The project header shown above contains a quick jump field allowing you to jump to the same screen on another project.
To navigate to the appropriate screen, make selection from the Go or Add drop-down Lists.

<table>
<thead>
<tr>
<th>Section Heading</th>
<th>Section Heading</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted Certificate</td>
<td>Adjustment</td>
</tr>
</tbody>
</table>

**REQUIRED FIELDS**
- * denotes required fields

ECMS utilizes the main page layout where screens are divided into sections and sub-sections containing buttons or hyperlinks to create or edit section data.

ECMS II

**SECTION HEADINGS**

**REQUIRED FIELDS**

Required fields are denoted with a flag icon as shown on the above screen.
**SEARCH SCREENS (PORTALS)**

Search portals available in ECMS are shown below. The above Projects Portal is used to search for projects via custom searches or express searches.

<table>
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<th>Portal</th>
<th>Access from Menu Bar</th>
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<tbody>
<tr>
<td>Projects</td>
<td>Construction Projects → Projects</td>
</tr>
<tr>
<td>Estimates</td>
<td>Construction Projects → Estimates</td>
</tr>
<tr>
<td>Work Orders</td>
<td>Construction Projects → Work Orders</td>
</tr>
<tr>
<td>Item History</td>
<td>Construction Projects → Resources → Item History</td>
</tr>
<tr>
<td>Master Items</td>
<td>Construction Projects → Resources → Master Items</td>
</tr>
<tr>
<td>Bid Packages</td>
<td>Solicitations → Contractors → Bid Packages</td>
</tr>
<tr>
<td>Bid Results</td>
<td>Solicitations → Contractors → Bid Results</td>
</tr>
<tr>
<td>Contractor Portal</td>
<td>Business Partners → Contractors</td>
</tr>
<tr>
<td>Forum</td>
<td>Solicitations → Forum</td>
</tr>
<tr>
<td>My Work Queue</td>
<td>Work Queue Icon on the Menu Bar</td>
</tr>
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</table>
PERFORM A SEARCH

ECMS

SEARCH FOR A CONSTRUCTION PROJECT

NAVIGATION BAR

Contractor Services
- Contract Awards
- Contractor Information
- eBidding
- Estimates & Work Orders
- My Projects
- My Work Queue

From the navigation bar, click on Contractor Services and then on My Projects.

Pre Construction (Post Award)

<table>
<thead>
<tr>
<th>Project</th>
<th>Status</th>
<th>Type</th>
<th>District</th>
<th>County</th>
<th>S/N</th>
<th>Section</th>
<th>Short Description</th>
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<tbody>
<tr>
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</tbody>
</table>

Click on Project Number hyperlink to go to the Construction Project Information screen.

ECMS II

SEARCH FOR A CONSTRUCTION PROJECT

1. Begin at the ECMS HOME PAGE.
2. Click CONSTRUCTION PROJECTS option from Menu Bar.
3. Select PROJECTS from sub-menu.
4. At the PROJECTS PORTAL click the ADVANCED SEARCH hyperlink.
5. At the PROJECT SEARCH screen enter your search criteria and click SEARCH on the toolbar.
6. At SEARCH RESULTS screen, if not satisfied with results, click REFINE SEARCH on the toolbar, revise your criteria or click CLEAR on the toolbar to begin over.
7. Click on PROJECT NUMBER hyperlink to go to the PROJECT INFORMATION screen.
SAVE OR RETRIEVE A SAVED SEARCH

ECMS

SEARCH FOR A CONSTRUCTION PROJECT

NAVIGATION BAR

Contractor Services
Contract Awards
Contractor Information
eBidding
Estimates & Work Orders
My Projects
My Work Queue

SAVE OR RETRIEVE A CONSTRUCTION PROJECT SEARCH

ECMS II

1. Begin at the PROJECTS PORTAL screen and click ADVANCED SEARCH.

   ![Advanced Search Screenshot]

2. At the PROJECT SEARCH screen, enter your search criteria and click SEARCH on the toolbar.

3. Scroll down to the SAVED SEARCHES heading, enter a name for the search in the SAVE SEARCH AS field and click the SAVE button. Saved searches will appear in the drop-down list under previous search criteria under the SAVED SEARCHES heading.

4. Next to the name of your last saved search are three buttons. Clicking on one of these buttons will result in the following actions.
   - EXECUTE - executes one of your saved searches
   - LOAD - loads search criteria for a saved search so you can review or update the criteria
   - DELETE - deletes one of your saved searches

5. To retrieve a saved search, select a saved search from the drop-down list next to the EXECUTE button at the top of the PROJECTS PORTAL screen and click EXECUTE.

From the navigation bar, click on Contractor Services, then My Projects, enter your search criteria and click Save.

At list of displayed projects, click on Project Number hyperlink to go to Construction Project Information screen.

Cannot save a named search.
Selection pop-up windows are available in ECMS by clicking on a drop-down selection arrow. A typical ECMS selection window is shown below.

**Filter**

Filters are available to search within lists and/or sort lists to quickly locate entries you need.

- Click the down arrow next to the Filter and select Search to search within a list.
- Click the down arrow next to the default Name field to change the field you want to filter by.
From the Navigation Bar, under Contractor Services, click on My Work Queue option.

Log into ECMS daily and check My Work Queue to view any documents requiring your action.

1. Login to ECMS and at the ECMS HOME PAGE click on MY WORK QUEUE icon.

2. At the MY WORK QUEUE PORTAL, under the CUSTOM SEARCHES, heading click ADVANCED SEARCH.

3. Under the SEARCH CRITERIA heading, click in the checkbox(es) in the EXCLUDE GROUPS or EXCLUDE SECTIONS you want to exclude from the Exclude Groups or Sections from your search and click SEARCH on the toolbar.

4. At the MY WORK QUEUE ITEMS screen, click on a hyperlink next to the item requiring an action.
PRINTING FROM ECMS

ECMS

PRINT AN ECMS SCREEN

Use the Print Screen button to print the entire screen.

ECMS II

PRINT AN ECMS SCREEN

ECMS provides print screen capability from any ECMS screen that allows a screen to be printed in its entirety. Use the Printer icon on the toolbar to ensure the entire screen is printed.

1. From any application screen, click on the PRINTER ICON on the toolbar. A separate pop-up window appears on top of the current window with the screen to be printed.

2. Click on the PRINTER ICON in the upper right corner of the ECMS Banner. The print dialog box is displayed.

3. Click the Print button on the print dialog box to send the screen to the printer.
From anywhere within ECMS the banner is visible across the top of the screen and contains three helpful links: HOME, SITE INDEX and HELP.

1. Begin at the ECMS Home Page and click the HELP hyperlink on the ECMS BANNER.

2. At the ECMS HELP screen, click the ECMS hyperlink in the left pane to display an expanded list of help topics. Click on a topic icon to expand the list further and click on a TOPIC hyperlink to view the Help screen for that topic.

3. Click the PRINT button to display the print dialog box and print a specific help topic.

4. Click the SEARCH button to search on specific keyword(s) within the ECMS help topics (including process and screen help).

5. Click the CONTENTS button to return to the list of help topics.

6. Click HELP on the toolbar on any screen and select SCREEN HELP for context sensitive help.

APPLICATION PERMISSIONS

1. Click HELP on the toolbar and select APPLICATION PERMISSIONS for specific security questions, such as who may access a specific screen in a given status (e.g., "Who can create an Authorization for Contract Work?"). That screen's security settings and the users who may access the security function within the ECMS application are displayed.
ECMS REVIEW AND APPROVALS

Reviews and approvals are performed at specific function screens, as required.

Approve and Reject buttons appear at the bottom of the screen.

ECMS REVIEW & APPROVALS

The Workflow process allows ECMS users to review and approve or reject items or documents within ECMS. The WORKFLOW button on the toolbar has several options as described in the table below.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledge</td>
<td>Allows an ECMS user to acknowledge an item in ECMS.</td>
</tr>
<tr>
<td>Approve</td>
<td>Allows for the approval by various ECMS users.</td>
</tr>
<tr>
<td>Reject</td>
<td>Allows ECMS users to reject an item in review. This option requires items to be recreated and resubmitted for review.</td>
</tr>
<tr>
<td>Reject/Revise</td>
<td>Allows ECMS users to reject an item in review and allow for revisions to be made. The Reject/Revise option allows the item to be revised and resubmitted.</td>
</tr>
<tr>
<td>Revise</td>
<td>Allows an ECMS user to revise a document after it has been submitted. Revisions can be made by either the Consultant or by PENNDOT. Various business rules dictate when and who can revise a document.</td>
</tr>
<tr>
<td>Submit</td>
<td>Allows an ECMS user to submit an item for review.</td>
</tr>
</tbody>
</table>

1. Select the WORKFLOW button on the toolbar and then select the appropriate action. The WORKFLOW section at the bottom of many ECMS screens displays who approved an item with the action taken and a date/time stamp.

2. If an item is being rejected, you must enter a comment in the COMMENTS text box under the WORKFLOW heading. (Note: Comments are associated to a workflow action and will only be saved when performing a workflow action.)
LOGGING IN

ECMS

NAVIGATION BAR

Enter login name and password. Click the GO button.

LOGGING OUT

NAVIGATION BAR

Click on logout in navigation bar and OK on pop-up message.

EMCS II

LOGGING IN

LOGGING OUT

1. Begin at the ECMS Home Page.
2. In lower right corner, enter your User ID and Password.
3. Click the Login button and click OK on the login message.

1. Click the Logout hyperlink in the upper right corner of the ECMS Home Page, not the X in the far right corner of the browser to exit ECMS.

AFTER LOGIN, CLICKING ON NAME WILL SHOW ECMS USER GROUPS ASSIGNED TO USER ID.
Begin at the navigation bar, click on Contractor Services, then My Projects. Enter your search criteria and click Save.

At list of displayed projects, click on Project Number hyperlink and navigate to the appropriate screen by making a selection from the Go or Add drop-down Lists at the bottom of the screen.

The PROJECT HEADER at the top of every screen contains a quick jump field which allows you to jump to the same screen on another project. Clicking on the PROJECT hyperlink from any screen will always take you back to the PROJECT INFORMATION screen.

Clicking on a hyperlink from the GO drop-down list on the toolbar will take you to one of the following screens where you can view, add or edit project information:

- Project Administration
- Project Status Errors
- Workspace
- Workspace Estimate
- Workflow Work Order Assignment

The DETAIL heading defaults to a collapsed heading and contains program data entered by the Portfolio Manager when creating the project. Click on EDIT in the heading to edit or add project information.

(continued on next page)
Each of these five headings contains hyperlinks to the screens under each heading. Clicking on a hyperlink under a heading will take you to a screen for that function where you can view, add or edit project information.

### Schedule Information Heading

<table>
<thead>
<tr>
<th>Schedule Information</th>
<th>Original Completion:</th>
<th>Original Completion Days:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>01/01/2008</td>
<td>1000</td>
</tr>
</tbody>
</table>

The **SCHEDULE INFORMATION** heading contains the following information:

- Approved and Pending Time Extension Days
- Original, Current and Pending Completion Dates
- Last CDS NextGen Download
PROJECT INFORMATION SCREEN LAYOUT (CONT.)

ECMS

ECMS II

Financial Information

<table>
<thead>
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<th>Financial Information</th>
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<tbody>
<tr>
<td>Design Estimate: $234,607.40</td>
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<tr>
<td>Original Contract: $102,400.40</td>
</tr>
<tr>
<td>Work Order Added: $0.00</td>
</tr>
<tr>
<td>Work Order Deducted: $0.00</td>
</tr>
<tr>
<td>Work Order Pending: $0.00</td>
</tr>
<tr>
<td>Other Adjustments Added: $0.00</td>
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<tr>
<td>Other Adjustments Deducted: $0.00</td>
</tr>
<tr>
<td>Current Contract: $182,803.40</td>
</tr>
<tr>
<td>Estimate Item Total: $0.00</td>
</tr>
<tr>
<td>Amount Tendered: $0.00</td>
</tr>
<tr>
<td>Estimate Interest Paid: $0.00</td>
</tr>
<tr>
<td>Third Party Reimbursements: $0.00</td>
</tr>
<tr>
<td>Stored Materials Total: $0.00</td>
</tr>
<tr>
<td>Uncovered Stored Materials: $0.00</td>
</tr>
<tr>
<td>Adjustments Total: $0.00</td>
</tr>
<tr>
<td>Work Order Total: $0.00</td>
</tr>
<tr>
<td>Pending Adjustments: $0.00</td>
</tr>
<tr>
<td>Prime (Original): 100.00%</td>
</tr>
<tr>
<td>Sub (Original): 0.00%</td>
</tr>
<tr>
<td>Third Party Invoices: $0.00</td>
</tr>
</tbody>
</table>

The **FINANCIAL INFORMATION** heading contains hyperlinks to the following screens where you can view, add or edit project information:

- Design Estimate
- Original Contract
- Current Contract
- Estimate Item Total
- Estimate Interest Paid
- Stored Materials Total
- Third Party Invoices
- Adjustments Total
- Work Order Total
- Pending Adjustments
- Prime (Original)
- Sub (Original)
- Third Party Invoices
- Reimbursements

Minority Goal Summary

<table>
<thead>
<tr>
<th>Minority Goal Summary</th>
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<th>WD</th>
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<tr>
<td>Minority Goal Worksheet</td>
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</tr>
<tr>
<td>Minority Participation and Commitment</td>
<td>1.00%</td>
<td>1.00%</td>
</tr>
<tr>
<td>Subcontractor Requests</td>
<td>1.00%</td>
<td>1.00%</td>
</tr>
<tr>
<td>Minority Payments</td>
<td>1.00%</td>
<td>1.00%</td>
</tr>
</tbody>
</table>

The **MINORITY GOAL WORKSHEET** contains hyperlinks to the following screens to view, add or edit minority project information.

- Minority Goal Worksheet
- Minority Participation and Commitment
- Subcontractor Requests
- Minority Payments
Begin at the navigation bar, click on Contractor Services, then My Projects. Enter your search criteria and click Save.

To enter project information, at list of displayed projects, click on checkbox next to Project Number and navigate to the appropriate screen by making a selection from the Go or Add drop-down Lists at the bottom of the screen.

1. Begin at the PROJECT INFORMATION screen.
2. Scroll down to the DETAIL heading, click EDIT in the heading and scroll down to bottom of screen.
Begin at the navigation bar, click on Contractor Services, then My Projects. Enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number. Select Contract from the GO drop-down List at the bottom of the screen and click GO.

1. Begin at the PROJECT INFORMATION screen, scroll down to the AWARD section heading and click on CONTRACT hyperlink.

2. At the CONTRACT screen, hyperlinks are available to view Plans, Bid Items, Special Provisions, Attachments, Surety and Insurance.
Begin at the navigation bar, click on Contractor Services, then My Projects. Enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number. Select Construction Items from the GO drop-down List at the bottom of the screen and click GO.

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on CONSTRUCTION ITEMS hyperlink.

2. At the CONSTRUCTION ITEMS screen, click the ITEM NUMBER hyperlink to go to the CONSTRUCTION ITEM screen.
Begin at the Construction Items screen and click the Item Number hyperlink for the item.

At the Construction Item screen, click the Project Item History icon.

At the Construction Item History screen, use the Filter to filter information by Fund Code, Data Source and status category.

1. Begin at the CONSTRUCTION ITEMS screen and click on an ITEM hyperlink.

2. At the CONSTRUCTION ITEM screen, click GO on the toolbar and select CONSTRUCTION ITEM HISTORY.

3. At the CONSTRUCTION ITEM HISTORY screen you can view construction item history. You can also filter/search within records displayed by using the ITEM HISTORY search function or navigate to the ESTIMATE or WORK ORDER screen by clicking on the NUM hyperlink.
Begin at the navigation bar, click on Contractor Services, then My Projects. Enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number. Select FPN Information from the GO drop-down List at the bottom of the screen and click GO.

1. Begin at the PROJECT INFORMATION screen, scroll down to the SETUP section heading and click on FEDERAL PROJECT NUMBERS hyperlink.

2. At the FEDERAL PROJECT NUMBERS screen, click NEW on the toolbar.

3. At the FEDERAL ESTIMATE CONSTRUCTION ENGINEERING SUMMARY screen, enter the required information and click SAVE & EXIT on the toolbar.
ECMS

Begin at My Projects screen. Enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number. Select Project Development Checklist from the GO drop-down List at the bottom of the screen and click GO.

If the third party agreements are missing, click Edit and select Add Checklist Item from the ADD drop-down list and click ADD.

Select the appropriate agreement from the Selection window and click SAVE & EXIT. Click the agreement hyperlink, enter required information and click SAVE & EXIT when finished.

ECMS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the SOLICIT section heading and click the PROJECT DEVELOPMENT CHECKLIST hyperlink.

2. At the PROJECT DEVELOPMENT CHECKLIST screen, check under LOCAL AGREEMENTS AND COORDINATION category to see if a CONTRIBUTION OR REIMBURSEMENT AGREEMENT exists. If the Third Party Funding agreement is missing, click NEW on the toolbar to add it.

3. At the PROJECT DEVELOPMENT CHECKLIST DETAIL screen, click the LOOKUP icon to select the agreement from the COMMON SELECTION screen. Enter required information and click SAVE & EXIT on the toolbar.
CREATE A FUND CODE

BEGIN AT MY PROJECTS SCREEN. ENTER YOUR SEARCH CRITERIA AND CLICK SAVE.

FROM THE LIST OF PROJECTS, CLICK ON CHECKBOX NEXT TO PROJECT NUMBER. SELECT FUNDING INFORMATION FROM THE GO DROP-DOWN LIST AT THE BOTTOM OF THE SCREEN AND CLICK GO.

AT THE FUNDING INFORMATION SCREEN, CLICK THE ADD BUTTON. AT THE FUND DESCRIPTION SCREEN, ENTER REQUIRED INFORMATION AND CLICK SAVE & EXIT WHEN FINISHED.

1. BEGIN AT THE PROJECT INFORMATION SCREEN, SCROLL DOWN TO THE SETUP SECTION HEADING AND CLICK THE FUND CODES HYPERLINK.

2. AT THE FUND CODES SCREEN, CLICK NEW ON THE TOOLBAR.

3. AT THE FUND CODE SCREEN, ENTER THE REQUIRED INFORMATION AND CLICK SAVE & EXIT ON THE TOOLBAR WHEN FINISHED.
**ECMS**

Begin at My Projects screen. Enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number. Select Funding Information from the GO drop-down List at the bottom of the screen and click GO.

At the Funding Information screen, click the Fund Code hyperlink. At the Fund Description screen, scroll to the bottom of the screen and click the Link Item button.

At the Link Construction Items to Fund Code screen, click Edit at the bottom of the screen. Link and/or unlink item quantities as necessary and click Save and OK. Select another fund code and link or unlink item quantities and click Save & Exit when finished.

**EMCS II**

1. Begin at the PROJECT INFORMATION screen, scroll down to the SETUP section heading and click the FUND CODES hyperlink.

2. At the FUND CODES screen, click on the FUND CODE hyperlink and at the FUND CODE screen, click LINK ITEM on the toolbar.

3. At the FUND CODE ITEMS screen, select the item and enter the required information. Click SAVE & EXIT when finished.
ADD CONSTRUCTION INFORMATION

ECMS

Begin at My Projects screen. Enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number. Select Construction Project Information from the GO drop-down list at the bottom of the screen and click GO.

At the Construction Project Information screen, enter required information for the Data Source, Notice to Proceed, Stop or Enable Payments, and Modify Maximum Change Amount. Click Save & Exit when finished.

ECMS II

- ESTABLISH DATA SOURCE
- ISSUE NOTICE TO PROCEED
- STOP/ENABLE PAYMENTS
- MODIFY PROJECT CHANGE AMOUNT

1. Begin at the PROJECT INFORMATION screen, scroll down to DETAIL INFORMATION heading and click EDIT in the heading.

2. At the DETAIL header, scroll down to the CONSTRUCTION INFORMATION heading.

3. At the CONSTRUCTION INFORMATION section, enter information and click SAVE & EXIT on the toolbar when finished.
   - Enter DATA SOURCE (required field)
   - Indicate YES or NO if payments are enabled/stopped
   - Click ISSUE next to the ACTUAL NTP field
   - Enter REPORT UNIT if necessary
   - MAXIMUM CHANGE AMOUNT (pre-populated required field); modify if necessary
   - Enter NTP EXTENSION REQUEST DATE if necessary
SUBCONTRACTOR REQUESTS

ECMS

Begin at My Projects screen. Enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number. Select Subcontractor Requests from the GO drop-down List at the bottom of the screen and click GO.

At the Subcontractor Requests screen, click a Request Number hyperlink.

To view request items, select Subcontractor request Items from the Go dropdown list and click the Go button.

EMCS II

VIEW SUBCONTRACTOR REQUESTS

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click the SUBCONTRACTOR REQUESTS hyperlink.

2. At the SUBCONTRACTOR REQUESTS screen, click on the REQUEST NUMBER hyperlink in the first column to view the Request(s).

3. Alternatively, click on MY WORK QUEUE icon on the Menu Bar and click on SUBCONTRACTOR REQUESTS. Then click on the PROJECT NUMBER hyperlink to view Request(s).
APPROVE OR DISAPPROVE SUBCONTRACTOR REQUEST ITEMS

**ECMS**

Begin at the Subcontractor Requests screen and click on the Request Number hyperlink.

At the Subcontractor, Service and DBE Supplier Request screen, select Subcontractor Request Items from the Go drop-down list and click GO.

At the Subcontractor, Service and DBE Supplier Request Items screen, click the checkbox next to construction items you want to approve or disapprove.

Click the Approve or Disapprove button at the bottom of the screen and OK on the confirmation message.

**EMCS II**

1. Begin at the **SUBCONTRACTOR REQUESTS** screen and click on a **REQUEST NUMBER** hyperlink.

2. At the **REQUEST** screen, scroll down towards the bottom to the **REQUEST ITEMS** heading and click on an **ITEM** hyperlink.

3. At the **REQUEST ITEM** screen, click **WORKFLOW** on the toolbar and select **APPROVE** or **DISAPPROVE**. The status of the item will change to approved or disapproved accordingly.
ECMS

Begin at the Subcontractor Requests screen and click on the Request Number hyperlink.

At the Subcontractor, Service and DBE Supplier Request screen, select Subcontractor Request from the Go drop-down list and click GO.

From the Subcontractor, Service and DBE Supplier Request Items screen, click the Edit button at the bottom of the screen.

Enter required information and click the Approve or Disapprove button at the bottom of the screen and OK on the confirmation message.

EMCS II

1. Begin at the SUBCONTRACTOR REQUESTS screen and click on a REQUEST NUMBER hyperlink.

2. At the REQUEST screen, click WORKFLOW on the toolbar and select APPROVE or DISAPPROVE. The status of the request changes accordingly. (Note: When the request is in REVIEW status you can select CORRECT from WORKFLOW on the toolbar and the status of the request changes to DRAFT. This action allows the prime/joint venture to modify the existing request.)

3. To add comments when disapproving or correcting a request, enter comments in the COMMENTS field at the bottom of the screen first, then click WORKFLOW and select an action. (Note: Comments are associated to a workflow action and will only be saved when performing a workflow action.)
**ECMS**

From the Navigation Bar, select Contractor Services, then Contractor Information screen.

At the Contractor Information screen, under the View heading, click Pending Minority Payments hyperlink.

Click the blue twisty next to IIC Review heading and click Accept or Reject button at the bottom of the screen.

**EMCS II**

1. Begin at **MY WORK QUEUE** screen and click on **MINORITY PAYMENTS**.

   **Note:** Alternatively, you may click on the **MINORITY PAYMENTS** hyperlink under the MINORITY INFORMATION section heading on the PROJECT INFORMATION screen to go to the MINORITY PAYMENTS screen.

2. At **MY WORK QUEUE ITEMS** screen, under **MINORITY PAYMENTS**, click on a **PROJECT NUMBER** hyperlink.

3. **ACCEPT** - At the **MINORITY PAYMENT** screen, click **WORKFLOW** on the toolbar, select **ACCEPT** and click **OK** on the confirmation message. The status changes to the next status (BEO Review, IIC Review and District Review.) When the District review accepts, the status will then change to Approved.

4. **REJECT** - At the **MINORITY PAYMENT** screen, click **WORKFLOW** on the toolbar, select **REJECT** and click **OK** on the confirmation message. The status changes to the previous review status or Draft status. To add comments when rejecting a minority payment, enter comments in the **COMMENTS** field at the bottom of the screen first, then click **WORKFLOW** and select an action. **(Note: Comments are associated to a workflow action and will only be saved when performing a workflow action.)**
CREATE AUTHORIZATION FOR CONTRACT WORK
PRIOR TO CREATING WORK ORDER

ECMS

From My Projects screen, enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number.

Select Authorization for Contract Work from the ADD drop-down List at the bottom of the screen and click ADD.

At the Authorization for Contract Work screen, enter required information Click Save & Exit and OK on the confirmation message.

EMCS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the CONTRACT WORK AUTHORIZATIONS hyperlink.

2. At the AUTHORIZATIONS FOR CONTRACT WORK screen, click NEW on the toolbar to go the AUTHORIZATION FOR CONTRACT WORK screen. (CONTINUE TO STEP 6 in the next topic)
CREATE AUTHORIZATION FOR CONTRACT WORK FROM WITHIN WORK ORDER

ECMS

Begin at the Work Order screen and select Authorization for Contract Work from the Add drop-down list and click the ADD button.

At the Authorization for Contract Work screen, enter the required information and click Save & Exit and OK on the confirmation message when finished.

EMCS II

Begin at the Project Information screen, scroll down to the Construct section heading and click on the Work Orders hyperlink.

3. At the Work Orders screen, click on the Work Order hyperlink to go to the Work Order screen.

4. At the Work Orders screen, click on the Work Order hyperlink to go to the Work Order screen.

(continued on next page)
CREATE AUTHORIZATION FOR CONTRACT WORK FROM WITHIN WORK ORDER (CONT.)

ECMS

5. At the WORK ORDER screen, click CREATE next to AUTH (CS-373) to go to the AUTHORIZATION.

EMCS II

6. At the AUTHORIZATION FOR CONTRACT WORK screen, complete required information and click SAVE on the toolbar.
ECMS

Begin at the Authorization for Contract Work screen and click Edit at the bottom of the screen if necessary.

Select Existing Item/Special Provision for the Add drop-down list and click the ADD button.

At the Authorization Item and Special Provision screen, click on the blue twisty next to Existing Items.

At the Authorization Item and Special Provision Selection screen, click the checkbox(es) next to the existing item(s) to add. Click Save & Exit and OK on the confirmation message when finished.

EMCS II

1. Begin at the AUTHORIZATION FOR CONTRACT WORK screen, scroll down to the bottom of the screen to the ITEMS heading and click MODIFY in the heading.

2. At the COMMON SELECTION – CONSTRUCTION ITEM LIST TO MODIFY screen, use the filter to find the item(s) and select by clicking in the checkbox(es) next to the item(s) and click OK on the toolbar.

3. At the AUTHORIZATION ITEM screen, enter the required information and click SAVE & EXIT on the toolbar.
ADD NEW STANDARD OR MODIFIED STANDARD ITEM TO AUTHORIZATION FOR CONTRACT WORK

ECMS

Begin at the Authorization for Contract Work screen and click Edit at the bottom of the screen if necessary.

Select New Item/Special Provision from the Add drop-down list and click the ADD button.

At the Authorization Item and Special Provision Selection screen, enter required information. Click Save & Exit and OK on the confirmation message when finished.

EMCS II

1. Begin at the AUTHORIZATION FOR CONTRACT WORK screen, scroll down to the bottom of the screen to the ITEMS heading and click NEW in the heading.

2. At the AUTHORIZATION ITEM screen, click the LOOKUP icon and at the SEARCH MASTER ITEM screen, enter the item number and click SEARCH on the toolbar. Then at the COMMON SELECTION – MASTER ITEMS LIST click the icon next to the item number.

3. At the AUTHORIZATION ITEM screen, enter the required information and click SAVE & EXIT on the toolbar.
ADD NEW NON-STANDARD ITEM TO AUTHORIZATION FOR CONTRACT WORK

ECMS

Begin at the Authorization for Contract Work screen and click Edit at the bottom of the screen if necessary.

Select New Item/Special Provision for the Add drop-down list and click the ADD button.

At the Authorization Item and Special Provision Selection screen, enter required information. Click Save & Exit and OK on the confirmation message when finished.

EMCS II

1. Begin at the AUTHORIZATION FOR CONTRACT WORK screen, scroll down to the bottom of the screen to the ITEMS heading and click NEW in the heading.

2. At the AUTHORIZATION ITEM screen, enter the ITEM NUMBER in the NEW NUMBER field and click the RETRIEVE icon.

3. At the AUTHORIZATION ITEM screen, enter the required information including the work class code(s) and click SAVE & EXIT on the toolbar.
ADD EXISTING SPECIAL PROVISION TO AUTHORIZATION FOR CONTRACT WORK

ECMS

Begin at the Authorization for Contract Work screen and click Edit at the bottom of the screen if necessary.

Select Existing Item/Special Provision for the Add drop-down list and click the ADD button.

At the Authorization Item and Special Provision screen, click on the blue twisty next to Existing Special Provisions.

At the Authorization Item and Special Provision Selection screen, click the checkbox(es) next to the existing special provisions to be added. Click Save & Exit and OK on the confirmation message when finished.

EMCS II

1. Begin at the AUTHORIZATION FOR CONTRACT WORK screen, scroll down to the bottom of the screen to the SPECIAL PROVISIONS heading and click MODIFY in the heading.

2. At the COMMON SELECTION – ASSOCIATED SPECIAL PROVISION LIST screen, use filter to find the item(s) and select by clicking in the checkbox next to the special provision and click OK on the toolbar.

3. At the SPECIAL PROVISION screen, enter the required information and click SAVE & EXIT on the toolbar.
ADD NEW STANDARD SPECIAL PROVISION TO AUTHORIZATION FOR CONTRACT WORK

ECMS

Begin at the Authorization for Contract Work screen and click Edit at the bottom of the screen if necessary.

Select New Item/Special Provision for the Add drop-down list and click the ADD button.

At the Authorization Item and Special Provision Selection screen, enter required information. Click Save & Exit and OK on the confirmation message when finished.

EMCS II

1. Begin at the AUTHORIZATION FOR CONTRACT WORK screen, scroll down to the bottom of the screen to the SPECIAL PROVISIONS heading and click NEW in the heading.

2. At the WORK ORDER AUTHORIZATION SPECIAL PROVISION screen, click on the LOOKUP icon next to INDEX or CATEGORY.

3. At the STANDARD SPECIAL PROVISION SELECTION LIST screen, use the filter to search for the special provision. Click on the icon next to the special provision you want to add.

4. At the WORK ORDER AUTHORIZATION SPECIAL PROVISION screen, enter the required information including the work class code(s) and click SAVE & EXIT on the toolbar.
**SUBMIT AUTHORIZATION FOR CONTRACT WORK**

### ECMS

From My Projects screen, enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number. Select Authorizations for Contract Work from the GO drop-down list at the bottom of the screen and click GO.

### EMCS II

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<th>Select</th>
<th>Award</th>
<th>Construct</th>
<th>Closeout</th>
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<tr>
<td>Team</td>
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<td>Award Checklist</td>
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<td>Project Development Checklist</td>
<td>Minority Solicitations</td>
<td>Subcontractor Requests</td>
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<td>Program Data (Z)</td>
<td>Special Provisions</td>
<td>Minority Participation and Commitment</td>
<td>Contract Work Authorizations</td>
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<tr>
<td>Minority Goal</td>
<td></td>
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</tr>
</tbody>
</table>

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the CONTRACT WORK AUTHORIZATIONS hyperlink.

2. At the AUTHORIZATION FOR CONTRACT WORK screen, click on the AUTHORIZATION NUMBER hyperlink in the first column.

3. At the AUTHORIZATION FOR CONTRACT WORK screen, click WORKFLOW on the toolbar and select SUBMIT. The workflow status is updated to SCOPE REVIEW.
DISPOSITION OF ITEMS AND ACCEPT AUTHORIZATION FOR CONTRACT WORK

ECMS

From My Projects screen, enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number. Select Authorizations for Contract Work from the GO drop-down list at the bottom of the screen and click GO.

At the Authorizations for Contract Work screen, click Authorization Number hyperlink in the Auth column.

At the Authorization for Contract Work screen in Penndot Review status, enter the required information. Click Save & Exit and OK on the confirmation message when finished.

EMCS II

1. Begin at the AUTHORIZATIONS FOR CONTRACT WORK screen and click on the AUTHORIZATION NUMBER hyperlink in the first column.

2. At the AUTHORIZATION FOR CONTRACT WORK in PENNDOT REVIEW status, scroll down to the ITEMS heading and click EDIT in the heading.

3. At the AUTHORIZATION ITEMS screen, disposition the items by clicking on the down arrow under the NEGOTIATION column, select ACCEPTED, REJECTED or FORCE ACCOUNT and click SAVE & EXIT on the toolbar.

4. At the AUTHORIZATION FOR CONTRACT WORK screen, click WORKFLOW on the toolbar, select ACCEPT and OK on the confirmation message.
CREATE A WORK ORDER

ECMS

From My Projects screen, enter your search criteria and click Save.

From the list of projects, click on checkbox next to Project Number.

Select Work Order from the ADD drop-down list at the bottom of the screen and click Add.

At the Work Order screen, enter required information and click Save and OK at the confirmation message.

EMCS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the WORK ORDERS hyperlink.

2. At the WORK ORDERS screen, click NEW on the toolbar.

3. At the WORK ORDER screen, enter required information and click SAVE & EXIT.
**ECMS**

From My Projects screen, enter your search criteria and click Save. From the list of projects, click on checkbox next to Project Number.

Select Authorizations for Contract Work from the GO drop-down List at the bottom of the screen and click GO.

At the Authorizations for Contract Work screen, click the Authorization Number hyperlink in the Auth column.

At the Authorization for Contract Work screen, click the selection arrow in the Work Order field and at the Associate Work Order selection window select the Work Order to be associated with this authorization. Click Save & Exit and OK on the confirmation message when finished.

---

**EMCS II**

1. Begin at the WORK ORDER screen, click GO on the toolbar and select AUTHORIZATIONS FOR CONTRACT WORK.

2. At the AUTHORIZATIONS FOR CONTRACT WORK screen, click on the AUTHORIZATION NUMBER hyperlink under the AUTH column.

3. At the AUTHORIZATION FOR CONTRACT WORK screen, click on the LOOKUP icon next to WORK ORDER.

4. Click in the checkbox next to the Work Order number to select it from the COMMON SELECTION – SELECT ASSOCIATED WORK ORDERS screen, click OK and click SAVE & EXIT when finished.
CREATE A WORK ORDER EXPLANATION

ECMS

Begin at the Work Order screen and select Work Order Explanation from the ADD drop-down list and click Add.

At the Work Order Explanation screen, enter required information and click Save & Exit and OK at the confirmation message.

EMCS II

1. Begin at the WORK ORDER screen and click CREATE next to EXPLANATION.

2. At the WORK ORDER EXPLANATION screen, enter the required information.

3. Click SAVE & EXIT on the toolbar when finished.
**ADD EXISTING CONSTRUCTION ITEM TO A WORK ORDER**

**ECMS**

Begin at the Work Order screen and select Existing Item from the ADD drop-down list and click Add.

At the Work Order Item Selection screen, click the blue twisty to expand the Existing Items heading. Enter required information and click Save & Exit and OK at the confirmation message when finished.

**EMCS II**

1. Begin at the WORK ORDER screen, scroll down to the ITEMS heading and click MODIFY in the heading.

2. At the COMMON SELECTION – CONSTRUCTION ITEM LIST TO MODIFY, click in the checkbox(es) next to the item(s) and click OK on the toolbar.

3. At the WORK ORDER ITEM screen enter modifications and click SAVE & EXIT when finished.
ADD NEW STANDARD OR MODIFIED ITEM TO A WORK ORDER

**ECMS**

Begin at the Work Order screen and select New Item from the ADD drop-list and click Add.

At the Work Order Item Selection screen, select the item(s) and at the Work Order screen enter required information. Click Save & Exit and OK at the confirmation message when finished.

**EMCS II**

1. Begin at the WORK ORDER screen, scroll down to the ITEMS heading and click NEW in the heading.

2. At the WORK ORDER ITEM screen, click the LOOKUP icon and at the SEARCH MASTER ITEM screen, enter the ITEM NUMBER and click SEARCH on the toolbar. Then at the COMMON SELECTION – MASTER ITEMS LIST, click the icon next to the item number.

3. At the WORK ORDER ITEM screen, enter required information and click SAVE & EXIT on the toolbar when finished.
ADD NEW NON-STANDARD ITEM TO A WORK ORDER

**ECMS**

Begin at the Work Order screen and select New Item from the ADD drop-list and click Add.

At the Work Order Item Selection screen, enter the item number and at the Work Order screen enter required information. Click Save & Exit and OK at the confirmation message when finished.

**EMCS II**

1. Begin at the WORK ORDER screen, scroll down to the ITEMS heading and click NEW in the heading.

2. At the WORK ORDER ITEM screen, enter the ITEM NUMBER, click the RETRIEVE icon and enter required information.

3. Click SAVE & EXIT on the toolbar when finished.
CREATE WORK ORDER ITEM COST JUSTIFICATION

ECMS

Begin at MY Projects screen and click the checkbox next to the Project Number. Select Work Orders by Status from the Go drop-down list and click GO.

At the Work Orders by Status screen, click the Work Order Items icon next to the Work Order number hyperlink.

Click the Item Number hyperlink and at the Work Order Item screen, select Item Cost Justification from the Go drop-down list and click GO.

At the Work Order Item Cost Justification screen, click Edit at the bottom of the screen. Select the justification method from the Justification Method drop-down list and click Save & Exit.

EMCS II

1. Begin at the WORK ORDER screen, scroll down to the ITEMS heading and click on the JUSTIFICATION hyperlink for the item.

2. At the WORK ORDER ITEM COST JUSTIFICATION screen, scroll down to the COST JUSTIFICATION heading and enter required information.

3. Click SAVE & EXIT on the toolbar when finished.
From the Work Order Item Cost Justification screen, select Item Cost Justification – Allied Contracts from the ADD drop-down list and click Add.

At the Work Order Allied Contracts screen, enter required information and click Search. Click on the checkbox(es) in the Retain column on the results screen. Click Save & Exit and OK on the confirmation message when finished.

An icon for the Work Order Allied Contracts screen appears in the Allied Contracts field.

1. Begin at the WORK ORDER screen, scroll down to the ITEMS heading and click on the JUSTIFICATION hyperlink for the item.

2. At the WORK ORDER ITEM COST JUSTIFICATION screen, scroll down to the COST JUSTIFICATION heading and click the NEW button next to ALLIED CONTRACTS.

3. At the WORK ORDER ALLIED CONTRACTS screen, enter required information under the WORK ORDER ALLIED CONTRACTS heading and click SEARCH on the toolbar.
DELETE AN ITEM FROM A WORK ORDER
AND DELETE A WORK ORDER

ECMS
DELETE ITEM FROM WORK ORDER

Begin at the Work Order by Status screen and click on the Work Order Items icon next to the Work Order.

At the Work Order Items screen, click the checkbox(es) next to the Item Number(s) hyperlink and click the Delete button and OK on the confirmation message.

DELETE A WORK ORDER

Begin at the Work Order by Status screen and click the Work Order Number hyperlink for the Work Order to be deleted.

At the Work Order screen, click the DELETE button at the bottom of the screen. Click OK on the confirmation message.

EMCS II
DELETE ITEM FROM WORK ORDER

1. Begin at the WORK ORDER screen, scroll down to the ITEMS heading and click on the ITEM hyperlink for the item to be deleted.

2. At the WORK ORDER ITEM screen, click DELETE on the toolbar and OK on the confirmation message.

DELETE A WORK ORDER

1. Begin at the WORK ORDER screen.

2. Click DELETE on the toolbar, and OK on the confirmation message.
### SUBMIT A WORK ORDER / APPROVE OR DISAPPROVE A WORK ORDER

#### ECMS

Begin at the Work Order screen.

#### EMCS II

**SUBMIT A WORK ORDER**

1. Begin at the **WORK ORDER** screen and click **WORKFLOW** on the toolbar and select **SUBMIT**. The workflow status is updated accordingly.

**APPROVE/DISAPPROVE A WORK ORDER**

1. Begin at the **WORK ORDER** screen and click **WORKFLOW** on the toolbar and select **APPROVE** or **DISAPPROVE**. The workflow status is updated accordingly.
CREATE A BALANCING WORK ORDER

ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Work Orders by Status and click Go.

At the Work Orders by Status screen, click the ADD button at the bottom of the screen.

At the blank Work Order screen enter the required information and click Save and OK on the confirmation message.

Click the Balance button and OK on the confirmation message. The Work Order items that were automatically balanced display in the item list.

EMCS II

<table>
<thead>
<tr>
<th>Setup</th>
<th>Solicit</th>
<th>Award</th>
<th>Construct</th>
<th>Closeout</th>
</tr>
</thead>
</table>
| • Team
• Milestones
• Program Data (P)
• Agreements (D)
• Roadways (R)
• Structures (S)
• Fund Codes
• Federal Project Numbers
• Minority Goal | • Project Conditions
• Project Development Checklist
• Special Provisions
• Design Items
• Bid Package 1 | • Award Checklist
• Minority Solicitations
• Minority Participation and Commitment
• Component Item Schedules
• Bonds
• Bid Items
• Contract | • Addresses
• Subcontractor Requests
• Construction Items
• Contract Work Authorizations
• Work Orders
• Estimates
• Adjustments
• Time Extensions
• Reassigned (Rb) | • Construction Records
• Contractor Evaluations
• Finalization Checklist
• Acceptance Certificate
• Final Quantities |

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the WORK ORDERS hyperlink.

2. At the WORK ORDERS screen, click NEW on the toolbar.

1. At the WORK ORDER screen, enter required information and click BALANCE on the toolbar.

2. Select the construction item(s) with available quantities you want to balance and click OK. The items are balanced and available quantities updated accordingly.)
VIEW FEDERAL AID FUNDING REPORTS
AND NON-FEDERAL AID FUNDING REPORTS

ECMS

From the Navigation Bar, select Contractor Services, then Estimates & Work Orders.

At the Estimate & Work Orders Home/Search screen, select Work Orders by Status, enter the Project Number and click the Search button.

At the Work Orders by Status screen, click the Work Order Number hyperlink.

At the Work Order screen, select the Work Order Review Report from the Go drop-down list and Click GO.


EMCS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the SETUP section heading and click on the FEDERAL PROJECT NUMBERS hyperlink.

1. At the FEDERAL PROJECT NUMBERS screen, click GO and select one of the following Federal Aid Funding Reports:
   - Federal Aid Report by Fund Code
   - Federal Aid Report by FPN
   - Federal Aid Report Summary
   - Non-Federal Aid Report by Fund Code
   - Non-Federal Aid Report by WBS

   All of these reports can be printed by clicking on the PRINTER icon on the toolbar.
CREATE A STORED MATERIALS INVOICE

ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Add drop-down list, select Stored Material Invoices and click Add.

At the Stored Material invoice screen, click the Selection Arrow button in the Item field. Select the item for the invoice.

Enter the required information and click Save & Exit when finished.

EMCS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the FINANCIAL INFORMATION heading and click on the STORED MATERIALS TOTAL hyperlink.

2. At the STORED MATERIAL INVOICES screen click NEW in the toolbar.

3. At the STORED MATERIAL INVOICE screen, click the LOOKUP icon in the INDEX field to select the item for the invoice.

4. At the COMMON SELECTION - STORED MATERIAL - ITEM LOOKUP screen, click the icon next to the ITEM NUMBER, enter required information and click SAVE & EXIT on the toolbar.
Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Stored Material Invoices and click Go.

Click the Stored Material Number hyperlink.

Click the Edit button.

Edit the information as required and click Save & Exit.

To delete the stored material invoice, click the Delete button.
**CREATE AN ADJUSTMENT**

**ECMS**

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Add drop-down list, select Adjustment and click Add.

1. At the Adjustment screen, enter the required information and click Save & Exit.

**EMCS II**

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the ADJUSTMENTS hyperlink.

2. At the ADJUSTMENTS screen, click NEW in the toolbar.

2. At the ADJUSTMENT screen enter required information and click SAVE & EXIT on the toolbar.
Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Adjustments and click Go.

Click the Adjustment Type hyperlink. Click the Edit button.

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the ADJUSTMENTS hyperlink.

2. At the ADJUSTMENTS screen, click on the ADJUSTMENT hyperlink under the TYPE column.

3. At the ADJUSTMENT screen, edit the information as necessary and click SAVE & EXIT on the toolbar.

4. To delete an adjustment, click DELETE on the toolbar.
CREATE AN ESTIMATE

**ECMS**

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Add drop-down list, select Stored Material Invoices and click Add.

Enter the Period Ending date and click Save.

Click the estimate items amount hyperlink under This Estimate.

Change the Construction Item Filter and click the Refresh button. Enter the estimated item quantities and click Save & Exit.

---

**EMCS II**

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the ESTIMATES hyperlink.

2. At the ESTIMATES screen click the NEW button. At the ESTIMATE screen, enter the PERIOD ENDING DATE and click SAVE on the toolbar to remain on this screen. Then scroll down to the SUMMARY heading and click the ESTIMATE ITEMS AMOUNT hyperlink under THIS ESTIMATE column.

3. At the ESTIMATE ITEMS screen, click the NEW button on the toolbar. At the ESTIMATE ITEM screen click the checkbox next to the ITEM NUMBER and click OK.

4. At the ESTIMATE ITEMS MAINTENANCE screen, enter the estimate quantities for the items and click SAVE & EXIT in the toolbar.
EDIT OR DELETE AN ESTIMATE

ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Estimates and click Go.

Click the Estimate Number hyperlink and then click the Edit button.

To edit estimate items, select Estimate Items from the Go drop-down list and click the Go button. Update the item quantities and click Save & Exit.

To delete the estimate, click the Delete button.

EMCS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the ESTIMATES hyperlink.

2. At the ESTIMATES screen click the ESTIMATE NUMBER hyperlink.

EDIT OR DELETE ESTIMATE ITEMS

1. To edit item quantities, click the ESTIMATE ITEMS AMOUNT hyperlink under THIS ESTIMATE column. At the ESTIMATE ITEMS screen, click EDIT on the toolbar and make updates as necessary. When finished, click SAVE & EXIT on the toolbar.

2. To delete items, click the DELETE button in the toolbar. Select the items to delete and click OK.

3. To return to the estimate, click the ESTIMATE hyperlink in the ESTIMATE heading.

DELETE AN ESTIMATE

4. To delete the estimate, click the DELETE button in the toolbar on the ESTIMATE screen.

Estimates
EXCLUDE AN ADJUSTMENT FROM AN ESTIMATE

ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Estimates and click Go.

Click the Estimate Number hyperlink. Click the Edit button.

Select Estimate Adjustments from the Go drop-down list and click the Go button. Click Edit and clear the checkbox next to the adjustment to exclude. Click Save & Exit.

EMCS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the ESTIMATES hyperlink.

2. At the ESTIMATES screen click the ESTIMATE NUMBER hyperlink

3. At the ESTIMATE screen, scroll down to the ADJUSTMENTS HEADING. Click the EDIT button in the ADJUSTMENTS heading.

4. At the ESTIMATE ADJUSTMENTS screen, click the REMOVE checkbox(es) next to the adjustment(s) under the SELECTED RECORDS heading and click SAVE on the toolbar.
SUBMIT AN ESTIMATE

ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Estimates and click Go.

Click the Estimate Number hyperlink. Click the Edit button.

Click the Submit button.

EMCS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the ESTIMATES hyperlink.

2. At the ESTIMATES screen click the ESTIMATE NUMBER hyperlink.

3. At the ESTIMATE screen, click WORKFLOW on the toolbar and then select SUBMIT. The status of the Estimate changes to DE/DA REVIEW.
**APPROVE/DISAPPROVE AN ESTIMATE**

**ECMS**

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Estimates and click Go.

Click the Estimate Number hyperlink. Click the Edit button.

Click the Submit button.

**EMCS II**

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the ESTIMATES hyperlink.

2. At the ESTIMATES screen click the ESTIMATE NUMBER hyperlink.

3. At the ESTIMATE screen, click the WORKFLOW toolbar button and then select APPROVE or DISAPPROVE. If DISAPPROVE is selected, a workflow comment is required. (Note: Comments are associated to a workflow action and will only be saved when performing a workflow action.)

4. The Estimate status changes for the next reviewer’s review.
CREATE A THIRD PARTY INVOICE

ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number. From the Add drop-down list, select Third Party Invoice and click Add.

Select the Agreement Number-Payer from the Agreement drop-down list and click the GENERATE button.

Complete the required information and click the Save button.

EMCS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the FINANCIAL INFORMATION section heading and click on the THIRD PARTY INVOICES hyperlink.

2. At the THIRD PARTY INVOICES screen click NEW in the toolbar. At the next screen, select the Project by clicking the PLUS icon.

3. At the THIRD PARTY INVOICE screen enter the required information and click SAVE on the toolbar.
VIEW THIRD PARTY INVOICES

**ECMS**

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Third Party Invoices and click Go.

Click the Invoice Number hyperlink.

View the information and when finished click the Project hyperlink.

---

**EMCS II**

1. Begin at the PROJECT INFORMATION screen, scroll down to the FINANCIAL INFORMATION section heading and click on the THIRD PARTY INVOICES hyperlink.

   **Third Party Invoices**

   **Hyperlink**

2. At the THIRD PARTY INVOICES screen click the INVOICE NUMBER hyperlink.

   **Third Party Invoices**

3. At the THIRD PARTY INVOICE screen, view the information and click BACK on the toolbar when finished.
**GENERATE THIRD PARTY REIMBURSEMENT**

**ECMS**

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Add drop-down list, select Third Party Reimbursements and click Add.

Enter the required information and click the Save button.

**EMCS II**

<table>
<thead>
<tr>
<th>Financial Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Estimate: $234,697.40</td>
<td>Adjustments Total: $0.00</td>
</tr>
<tr>
<td>Original Contract: $192,463.40</td>
<td>Work Order Portion: 0.00%</td>
</tr>
<tr>
<td>Work Order Added: $0.00</td>
<td>Work Order Total: $0.00</td>
</tr>
<tr>
<td>Work Order Deducted: $0.00</td>
<td></td>
</tr>
<tr>
<td>Encumbrance Adjustments Added: $0.00</td>
<td>Other Adjustments Added: $0.00</td>
</tr>
<tr>
<td>Encumbrance Adjustments Deducted: $0.00</td>
<td>Other Adjustments Deducted: $0.00</td>
</tr>
<tr>
<td>Current Contract: $192,463.40</td>
<td>Pending Adjustments: $0.00</td>
</tr>
<tr>
<td>Estimate Item Total: $0.00</td>
<td>Work Completed: 0.00%</td>
</tr>
<tr>
<td>Amount Tensored: $0.00</td>
<td>Prime (Original): 100.00%</td>
</tr>
<tr>
<td>Estimate Interest Paid: $0.00</td>
<td>Sub (Original): 0.00%</td>
</tr>
<tr>
<td>Third Party Reimbursements: $0.00</td>
<td>Third Party Invoices: $0.00</td>
</tr>
<tr>
<td>Stored Materials Total: $0.00</td>
<td>Reimbursed Stored Materials: $0.00</td>
</tr>
<tr>
<td>Unrecovered Stored Materials: $0.00</td>
<td>Stored Materials: 0.00%</td>
</tr>
</tbody>
</table>

1. Begin at the **PROJECT INFORMATION** screen, scroll down to the **FINANCIAL INFORMATION** section heading and click on the **THIRD PARTY REIMBURSEMENTS** hyperlink.

2. At the **THIRD PARTY REIMBURSEMENTS** screen click the **NEW** button.

3. At the **THIRD PARTY REIMBURSEMENT** screen, enter required information and click **SAVE** on the toolbar.
Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Third Party Reimbursements and click Go.

Click the Payment Number hyperlink.

View the information and when finished click the Project hyperlink.
REQUEST TIME EXTENSION

From the Navigation Bar, select Contractor Services and then My Projects.

From the list of projects displayed, click the checkbox next to the Project Number hyperlink and select Time Extension from the Add drop-down list and click the ADD button.

At the Time Extension screen enter required information. Click Submit and OK on the confirmation message.

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the TIME EXTENSIONS hyperlink.

2. At the TIME EXTENSIONS screen, click NEW on the toolbar.

3. At the TIME EXTENSION screen, complete the TIME EXTENSION DETAIL section and click SAVE & EXIT when finished.
From the Navigation Bar, select Contractor Services and then My Projects.

From the list of projects displayed, click the checkbox next to the Project Number hyperlink and select Time Extensions from the Go drop-down list and click the GO button.

At the Time Extensions screen, click the Time Extension Number hyperlink to display the Time Extension you want to submit.

At the Time Extension screen click Submit and OK on the confirmation message.

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the TIME EXTENSIONS hyperlink

2. At the TIME EXTENSIONS screen, click a NUM hyperlink to display an existing Time Extension.

3. At the TIME EXTENSION screen, scroll down to the TIME EXTENSION DETAIL heading and complete the GRANTED INFORMATION section.

4. Enter comments if necessary in the COMMENT field, click WORKFLOW on the toolbar and select SUBMIT. (Note: Comments are associated to a workflow action and will only be saved when performing a workflow action.) Click OK on the confirmation message.
**APPROVE OR DISAPPROVE A TIME EXTENSION**

**ECMS**

From the Navigation Bar, select Contractor Services and then My Projects.

From the list of projects displayed, click the checkbox next to the Project Number hyperlink and select Time Extension from the Go dropdown list and click the GO button.

At the Time Extensions screen, click on the Time Extension Number hyperlink to display the Time Extension you want to approve or disapprove.

At the Time Extension screen scroll down to the bottom and click Approve or Disapprove button and OK on the confirmation message.

**EMCS II**

1. Begin at the **PROJECT INFORMATION** screen, scroll down to the **CONSTRUCT** section heading and click on the **TIME EXTENSIONS** hyperlink.

2. At the **TIME EXTENSIONS** screen, click a NUM hyperlink to display an existing Time Extension.

3. At the **TIME EXTENSION** screen, enter comments if necessary in the **COMMENT** field and click **WORKFLOW** on the toolbar. *(Note: Comments are associated to a workflow action and will only be saved when performing a workflow action.)*

4. Select **APPROVE** or **DISAPPROVE** on the **WORKFLOW** toolbar and **OK** on the confirmation message.

5. The Time Extension status changes to the first reviewer’s “Review” (e.g., “ACE/ACM Review” or “ADE/ADM Review”).
WITHDRAW A TIME EXTENSION

ECMS

From the Navigation Bar, select Contractor Services and then My Projects.

From the list of projects displayed, click the checkbox next to the Project Number hyperlink and select Time Extension from the Go drop-down list and click the GO button.

At the Time Extensions screen, click on the Time Extension Number hyperlink to display the Time Extension you want to approve or disapprove.

At the Time Extension screen scroll down to the bottom and click Approve or Disapprove button and OK on the confirmation message.

EMCS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the CONSTRUCT section heading and click on the TIME EXTENSIONS hyperlink.

2. At the TIME EXTENSIONS screen, click a NUM hyperlink to display an existing Time Extension.

3. Enter comments (required) in the COMMENT field, click WORKFLOW on the toolbar and select WITHDRAW. (Note: Comments are associated to a workflow action and will only be saved when performing a workflow action.) Click OK on the confirmation message.

4. The Time Extension status changes to Withdrawn.
CONTRACTOR EVALUATIONS
CUSTOMIZE CRITERIA & SET POINT VALUES

**ECMS**

From the Navigation Bar, select Contractor Services and then My Projects. From the list of projects displayed, click the checkbox next to the Project Number hyperlink and select Evaluations by Project from the Go drop-down list and click GO.

Select the Contractor from the Contractor drop-down list and click the ADD button.

![ECMS Image]

At the Contractor’s Past Performance Report screen, modify the point values if necessary and click Set Possible PT values button. Click OK at the confirmation message.

**EMCS II**

1. Begin at the PROJECT INFORMATION screen, scroll down to the CLOSEOUT section heading and click on the CONTRACTOR EVALUATIONS hyperlink.

2. At the CONTRACTOR EVALUATION screen, Click GO on the toolbar and select CONTRACTOR EVALUATION – PROJECT TEMPLATE.

3. At the CONTRACTOR EVALUATION – PROJECT TEMPLATE screen, complete the required fields with values and click SAVE & EXIT on the toolbar.
CREATE A CONTRACTOR EVALUATION

ECMS
From the Navigation Bar, select Contractor Services and then My Projects.

From the list of projects displayed, click the checkbox next to the Project Number hyperlink and select Evaluations by Project from the Go drop-down list and click the GO button.

At the Contractor Evaluations screen click the Business Partner hyperlink under the Business Partner column. At the Contractor's Past Performance Report screen, click Edit and assign a rating for each of the criteria.

Click Submit For Review button if you are ready to submit the evaluation. If necessary, click OK on the confirmation message.

EMCS

1. Begin at the PROJECT INFORMATION screen, scroll down to the CLOSEOUT section heading and click on the CONTRACTOR EVALUATIONS hyperlink.

2. At the CONTRACTOR EVALUATIONS screen, click NEW on the toolbar and select the Contractor from the CONTRACTOR EVALUATION – CONTRACTOR SELECTION screen.

3. At the CONTRACTOR EVALUATION screen, enter required information and rating values, then click SAVE & EXIT and OK on the confirmation message when finished.
ECMS

From the Navigation Bar, select Contractor Services and then My Projects. From the list of projects displayed, click the checkbox next to the Project Number hyperlink and select Evaluations by Project from the Go drop-down list and click GO.

Click the Business Partner hyperlink and click Edit at the bottom of the screen.

At the Contractor’s Past Performance Report screen, assign ratings for each of the criteria and if necessary add comments.

Click Submit for Review and OK at the confirmation message.

EMCS II

1. Begin at the PROJECT INFORMATION screen, scroll down to the CLOSEOUT section heading and click on the CONTRACTOR EVALUATIONS hyperlink.

2. At the CONTRACTOR EVALUATIONS screen, click on the TOTAL SCORE hyperlink.

3. At the CONTRACTOR EVALUATION screen, click WORKFLOW on the toolbar and select SUBMIT FOR REVIEW.

4. The Contractor Evaluation status changes to the first reviewer’s REVIEW (e.g., ACE/ACM or ADE/ADM REVIEW).
From the Navigation Bar, select Contractor Services and then My Projects. From the list of projects displayed, click the checkbox next to the Project Number hyperlink and select Contractor Evaluations from the Go drop-down list and click GO.

At the Contractor Evaluation Home/Search screen, enter the Project Number and select the Business Partner and click the Search button.

At the Contractor Evaluations list click on the Business Partner name hyperlink.

1. Begin at the PROJECT INFORMATION screen, scroll down to the CLOSEOUT section heading and click on the CONTRACTOR EVALUATIONS hyperlink.

2. At the CONTRACTOR EVALUATION screen, click on the TOTAL SCORE hyperlink for the selected Business Partner.
ECMS

Begin at the Contractor’s Past Performance Report screen and click Edit at the bottom of the screen.

Click Submit for Review button and OK on the confirmation message to approve the evaluation.

EMCS II

1. Begin at the CONTRACTOR EVALUATIONS screen and select a Contractor Evaluation in REVIEW status.

2. At the CONTRACTOR EVALUATION screen, click WORKFLOW on the toolbar and select SUBMIT FOR REVIEW to approve the Evaluation and move it to the next workflow review status. Click OK on the confirmation message.

3. The status of the Contractor Evaluation is updated to either the next approver’s status or to APPROVED if no other PENNDOT personnel need to review/approve the evaluation.
ECMS

Begin at the Contractor’s Past Performance Report screen and click Edit at the bottom of the screen.

Click Reject button and OK on the confirmation message to approve the evaluation. The status is updated accordingly.

EMCS II

1. Begin at the CONTRACTOR EVALUATIONS screen and select a Contractor Evaluation in ACE/ACM OR ADE/ADM review status.

2. At the CONTRACTOR EVALUATION screen, click WORKFLOW on the toolbar and select REJECT to reject and move it to the previous workflow review status. Click OK on the confirmation message.

3. The status of the Contractor Evaluation is updated to REVIEW status (ACE/ACM or ADE/ADM Review/IIC Review).
DELETE A CONTRACTOR EVALUATION

ECMS
From the Navigation Bar, select Contractor Services and then My Projects. From the list of projects displayed, click the checkbox next to the Project Number hyperlink and select Evaluations by Project from the Go drop-down list and click GO.

Select the Contractor from the Contractor drop-down list and click the ADD button.

At the Contractor's Past Performance Report screen, modify the point values if necessary and click Set Possible PT values button. Click OK at the confirmation message.

EMCS II

1. Begin at the CONTRACTOR EVALUATIONS screen and click on the TOTAL SCORE hyperlink.

2. At the CONTRACTOR EVALUATION screen, click DELETE on the toolbar.
**VIEW AND EDIT**
**THE FINALIZATION CHECKLIST**

**ECMS**

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Finalization Checklist and click Go.

At the Finalization Checklist screen, click the Finalization Checklist Item hyperlink and then click Edit.

To delete an item, click the Delete button. To edit an item, enter required information for the item and click Save & Exit.

**EMCS II**

1. Begin at the PROJECT INFORMATION screen, scroll down to the CLOSEOUT section heading and click on the FINALIZATION CHECKLIST hyperlink.

2. At the FINALIZATION CHECKLIST screen, to edit a checklist item, scroll down to the DETAILS heading and click the CHECKLIST ITEM hyperlink under the TITLE column. Edit the required information and click SAVE & EXIT on the toolbar.

3. At the FINALIZATION CHECKLIST screen, to delete a checklist item, scroll down to the DETAILS heading, click the CHECKLIST ITEM hyperlink under the TITLE column and click DELETE on the toolbar.
ADD A FINALIZATION CHECKLIST ITEM

ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Finalization Checklist and click Go.

At the Finalization Checklist screen, click the Add drop-down list and select the item to add. Click the Add button.

At the Finalization Checklist Item Detail screen, enter the required information and click Save & Exit.

EMCS II

At the FINALIZATION CHECKLIST screen, scroll down to the DETAIL heading and click NEW in the heading and select the item to add.

1. Begin at the FINALIZATION CHECKLIST DETAIL screen, enter the required information and click SAVE & EXIT on the toolbar.

2. At the FINALIZATION CHECKLIST DETAIL screen, enter the required information and click SAVE & EXIT on the toolbar.
SET AUDIT NOTIFICATION PERCENTAGE

ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Finalization Checklist and click Go.

At the Finalization Checklist screen, click the Edit button.

Enter the percentage in the Audit Notification Percent field and click the SAVE button.

EMCS II

1. Begin at the FINALIZATION CHECKLIST screen.
2. Scroll down to the GENERAL heading.
3. Enter the percentage in the AUDIT NOTIFICATION field.
4. Click SAVE on the toolbar.
ADD AN AUDIT CHECKLIST ITEM
AND CREATE A FIELD AUDIT REPORT

ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Finalization Checklist and click Go.

At the Finalization Checklist screen, click the Edit button.

At the Finalization Checklist screen, click the Add drop-down list and select Audit Checklist Item and click the Add button.

At the Finalization Checklist Detail screen, enter the required information and click Save.

To create the Field Audit Report, click the Create Report button. Select the range for estimates to include in the report. Select the Audit Report Generated (30% or random percentage checkbox). Click the Generate button.

Click Save & Exit when finished.

EMCS II

1. At the FINALIZATION screen, scroll down to the DETAIL heading and click NEW in the heading and select AUDIT.

2. At the FINALIZATION CHECKLIST DETAIL screen, enter required information. Click SAVE on the toolbar and then click CREATE next to the Field Audit Report.

3. At the FIELD AUDIT REPORT screen, enter the range of estimates and the percentage to include in the report, then click GENERATE on the toolbar, then click SAVE & EXIT on the toolbar.
**CREATE AND SUBMIT AN ACCEPTANCE CERTIFICATE**

**ECMS**

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Finalization Checklist and click Go.

At the Finalization Checklist screen, click the Edit button.

At the Finalization Checklist screen, click the Add drop-down list and select Acceptance Certificate and click the Add button.

At the Acceptance Certificate screen, click the Submit button and OK on the confirmation message.

**EMCS II**

<table>
<thead>
<tr>
<th>Status</th>
<th>Select</th>
<th>Award</th>
<th>Construct</th>
<th>Closeout</th>
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<td>• Project Conditions</td>
<td>• Award Checklist</td>
<td>• Addresses</td>
<td>• Construction Records</td>
</tr>
<tr>
<td>Milestones</td>
<td>• Project Development Checklist</td>
<td>• Minority Solicitations</td>
<td>• Subcontractor Requests</td>
<td>• Contractor Evaluations</td>
</tr>
<tr>
<td>Program Data (G)</td>
<td>• Special Provisions</td>
<td>• Minority Participation and Commitment</td>
<td>• Construction Items</td>
<td>• Finalization Checklist</td>
</tr>
<tr>
<td>Agreements (G)</td>
<td>• Design Items</td>
<td>• Component Item Schedules</td>
<td>• Contract Work Authorizations</td>
<td>• Acceptance Certificate</td>
</tr>
<tr>
<td>Roadways (H)</td>
<td>• Bid Package 1</td>
<td>• Bonds</td>
<td>• Work Orders</td>
<td>• Final Quantities</td>
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<tr>
<td>Structures (I)</td>
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<td>• Items</td>
<td>• Estimates</td>
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<tr>
<td>Flood Codes</td>
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<td>• Time Extensions</td>
<td>• Adjustments</td>
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<td>Federal Project Numbers</td>
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<td>• Reassigned (R)</td>
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<tr>
<td>Minority Goal</td>
<td></td>
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</tbody>
</table>

1. Begin at the **PROJECT INFORMATION** screen, scroll down to the CLOSEOUT section heading and click on the **FINALIZATION CHECKLIST** hyperlink.

2. At the **FINALIZATION CHECKLIST** screen, scroll down to the **DETAIL** heading and click **NEW** in the heading, then select **ACCEPTANCE CERTIFICATE**.

3. At the **ACCEPTANCE CERTIFICATE** screen, add comments if necessary in the **COMMENTS** field, click **WORKFLOW** on the toolbar and select **SUBMIT**. (Note: Comments are associated to a workflow action and will only be saved when performing a workflow action.)
ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Acceptance Certificate and click Go.

At the Finalization Checklist screen, click the Edit button.

At the Acceptance Certificate screen, click Approve or Reject at the bottom of the screen and OK on the confirmation message.

EMCS II

1. Begin at the FINALIZATION CHECKLIST screen, scroll down to the DETAIL heading, click NEW in the heading and select ACCEPTANCE CERTIFICATE.

2. At the ACCEPTANCE CERTIFICATE screen, add comments if necessary in the COMMENTS field, click WORKFLOW on the toolbar and select APPROVE or REJECT. (Note: Comments are associated to a workflow action and will only be saved when performing a workflow action.)
CREATE AND SUBMIT NOTIFICATION OF FINAL QUANTITIES

**ECMS**

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list select Finalization Checklist and click Go.

At the Finalization Checklist screen, select Notification of Final Quantities from the Add drop-down list and click Add.

At the Notification of Final Quantities screen, click Submit at the bottom of the screen and OK on the confirmation message.

<table>
<thead>
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<th>Construct</th>
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**EMCS II**

1. Begin at the **PROJECT INFORMATION** screen, scroll down to the **CLOSEOUT** section heading and click on the **FINALIZATION CHECKLIST** hyperlink.

2. At the **FINALIZATION** screen, scroll down to the **DETAIL** heading and click **NEW** in the heading and select **NOTIFICATION OF FINAL QUANTITIES**.

3. At the **NOTIFICATION OF FINAL QUANTITIES** screen, click **WORKFLOW** on the toolbar and select **SUBMIT** and **OK** on the confirmation message.
ECMS

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Finalization Checklist and click Go.

From the Project Development Checklist screen, click the NFQ hyperlink. At the Notification of Final Quantities screen, click Accept or Reject at the bottom of the screen and OK on the confirmation message.

EMCS II

<table>
<thead>
<tr>
<th>Category</th>
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1. Begin at the FINALIZATION CHECKLIST screen, scroll down to the DETAIL heading and click on the NFQ hyperlink in the TITLE column.

2. At the NOTIFICATION OF FINAL QUANTITIES screen, click WORKFLOW on the toolbar and select ACCEPT or REJECT and OK on the confirmation message.
**FINALIZE A PROJECT**

**ECMS**

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Finalization Checklist and click Go.

At the Finalization Checklist screen, click the Finalize button at the bottom of the screen and OK on the confirmation message.

**EMCS II**

1. Begin at the PROJECT INFORMATION screen, scroll down to the CLOSEOUT section heading and click on the FINALIZATION CHECKLIST hyperlink.

2. At the FINALIZATION CHECKLIST screen, click on FINALIZE on the toolbar. The EXECUTE RULES program runs; if errors are detected these must be fixed. Otherwise, the project status changes to FINAL.
**BREAKDOWN A PROJECT**

**ECMS**

Begin at the My Projects screen. Click in the checkbox next to the Project Number.

From the Go drop-down list, select Finalization Checklist and click Go.

At the Finalization Checklist screen, click the Breakdown button at the bottom of the screen and OK on the message that appears.

**EMCS II**

1. Begin at the PROJECT INFORMATION screen, click on GO on the toolbar and select PROJECT ADMINISTRATION.

2. At the PROJECT ADMINISTRATION screen, scroll down to the PROJECT section, click on the BREAKDOWN PROJECT RUN button and OK on the confirmation message. (Projects can be broken down from Post-Construction to Construction or from NFQ Submitted to Post-Construction.)