

Connecticut DOT

Number:

CD-2016-3

Office of Construction

Date:

June 8, 2016

# **CONSTRUCTION DIRECTIVE**

Construction Administrator

## **Reporting on Project Milestones and Key Dates**

This Construction Directive establishes procedures for tracking and monitoring project milestones (Key Dates). Reporting on project milestones and important project events is not only important to Department management, but also is necessary to keep the public informed of project progress and advised of potential traffic impacts before they occur.

There is functionality within SiteManager to enter and track Key Dates for each contract. Key Dates are found under Contract Records in the Contract Administration section of SiteManager. Effective July 1, 2016, Key Dates shall be entered in SiteManager for every active project. Instructions for entering Key Dates are included as an attachment to this Construction Directive. It is expected that the primary responsibility for entering the Key Date information into SiteManager will rest with the Chief Inspector/Resident Engineer. Project Engineers should review the SiteManager information periodically to ensure the Key Dates are complete and accurate. If there is insufficient space in SiteManager to enter all the Key Dates for a particular project, then only the nearest future dates should be entered. Once a Key Date has passed, new dates may be entered, overwriting the previous Key Dates. The intent of this procedure is to be able to generate a report on important project events which are anticipated in the near future.

The Office of Construction will be responsible for publishing a monthly report of the upcoming Key Dates on our construction projects across the state. The report will be circulated to Office of Construction managers, the Department's communication office, as well as the Office of the Commissioner. The accuracy of this report will depend upon accurate data being entered by project staff.

Thank you for your cooperation with the implementation of Key Date reporting.

Attachment

# **ADDING KEY DATES IN SITEMANAGER**

Description
Target Date - Bridge Closed
Target Date - Bridge Open
Target Date - Other
Target Date - Road Closed
Target Date - Road Open
Target Date - Stage Shift #1
Target Date - Stage Shift #2

## For contracts that started before January 1, 2016:

Each **Target Date** will have to be added manually to the list (only for the first time) from the dropdown menu. Access the screen shown below using the indicated path.

#### Main Panel > Contract Administration(+) > Contract Records > Key Dates

Scroll and double-click desired contract (e.g. 0012-0095)

🌃 Key Dates								
Contract ID:	1012-0095							
К	ey Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize	<b></b>		
Acceptance Date - Progress Report		00/00/00	00/00/00	N	Y			
Finals-Material Certification Given		00/00/00	00/00/00	N	Y			
Finals-CON100 Notice of Completion		00/00/00	00/00/00	N	Y			
Finals-CON500 Cert. of Accep. of Work		00/00/00	00/00/00	N	Y			
Finals-CON501 Cert. of Accep. of Project		00/00/00	00/00/00	N	Y			
Final Inspection		00/00/00	00/00/00	N	Y			
Preconstruction Meeting Date		10/13/15	00/00/00	N	N			
		00/00/00	00/00/00	N	N			
1						-		
Key Date Type:		•						
Projected Date:	Target Date - Bridge Open			<b>_</b>	]			
Actual Date:	- Target Date - Other							
Distribution List	Target Date - Road Closed				-			
	Target Date - Road Open							
message rext.				-	1			
	•		1		1			

- 1) Click last Key Date Type listed
- 2) Click New icon
- 3) From **Key Date Type:** dropdown menu in bottom box, choose the **Target Date** for which you wish to add a date. (SM screen should look like above picture)
- 4) Enter Projected Date
- 5) Enter **Distribution List:** (required)
  - District 1 District 1 Key Dates
  - District 2 District 2 Key Dates
  - District 3 District 3 Key Dates
  - District 4 District 4 Key Dates
- 6) Message Text: Enter brief description

- 7) Click Save
- 8) To add more **Target Dates**, repeat steps #2 to #6
- 9) Proceed to next section for an explanation of how to enter a Key Date

### For contracts that started after January 1, 2016:

The **Target Dates** will already be listed and will not need to be added manually.

#### Main Panel > Contract Administration(+) > Contract Records > Key Dates

Scroll and double-click desired contract (e.g. 0065-0112)

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize				
Finals-CON500 Cert. of Accep. of Work	00/00/00	00/00/00	N	Y				
Finals-CON501 Cert. of Accep. of Project	00/00/00	00/00/00	N	Y				
Final Inspection	00/00/00	00/00/00	N	Y				
Target Date - Bridge Closed	00/00/00	00/00/00	N	N				
Target Date - Bridge Open	00/00/00	00/00/00	N	N				
Target Date - Road Closed	00/00/00	00/00/00	N	N				
Target Date - Road Open	00/00/00	00/00/00	N	N				
Target Date - Stage Shift #1	00/00/00	00/00/00	N	N	_			
Key Date Type: Acceptance Date - Progress Rep	ort 💌							
Projected Date: 00/00/00	te: 00/00/00							
Actual Date: 00/00/00	: 00/00/00 Required to Finalize							
INTER ALL AND A	Recipient:							

Note: Target Date – Stage Shift #2, if necessary, may have to be added manually (see previous section)

- 1) Click the desired Target Date
- 2) Enter Projected Date and/or Actual Date:
- 3) Enter Distribution List: (required)
  - District 1 District 1 Key Dates District 2 - District 2 Key Dates District 3 - District 3 Key Dates District 4 - District 4 Key Dates
- 4) Message Text: Enter brief description
- 5) Click Save
- 6) To add more Target Dates, repeat #1 to #4