



# Contractor's Guide

---



## **4. Managing Subcontract Information**

---

This chapter contains information to help the prime contractor on a state transportation department project exchange contract and vendor information with the State Highway Agency (SHA). Contractors will use the SubCon program to enter subcontract information, including subcontract vendors, items, item quantities, and item prices, generate reports, and submit the modified contract information back to the SHA.

### **4.1 Installing SubCon from Floppy Install Disks**

Follow these steps to install the Expedite SubCon application software from the floppy disk you received from the SHA:

1. Insert the Install Disk into your floppy drive.
2. The Installation window appears. Click the INSTALL button.
3. The Expedite SubCon Setup program will begin. Follow the instructions given in the setup program.

### **4.2 Starting SubCon**

You must be running Windows to start the SubCon program. To open the SubCon program, double-click on the SubCon icon.

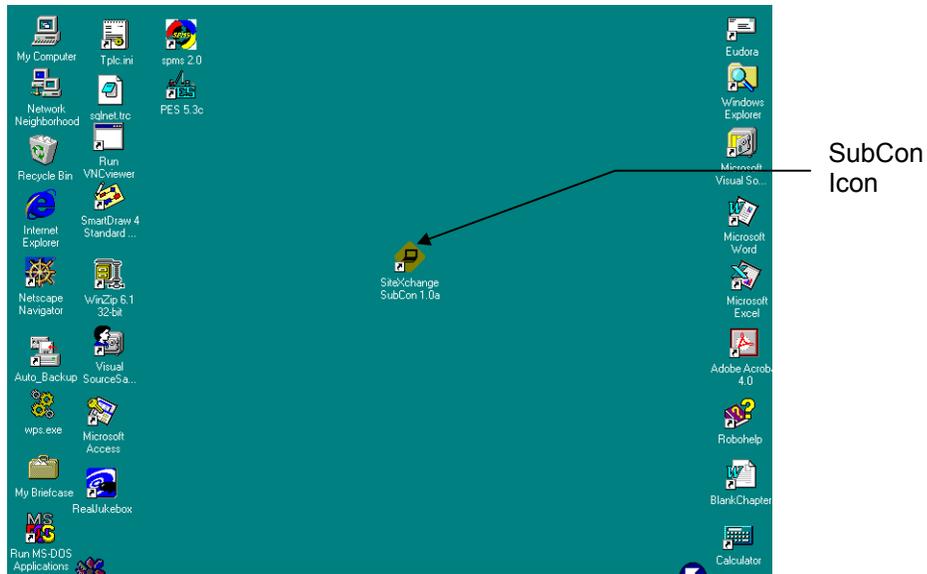


Figure 4-1. SubCon Icon

SubCon opens the main SubCon window, displaying two empty panes.

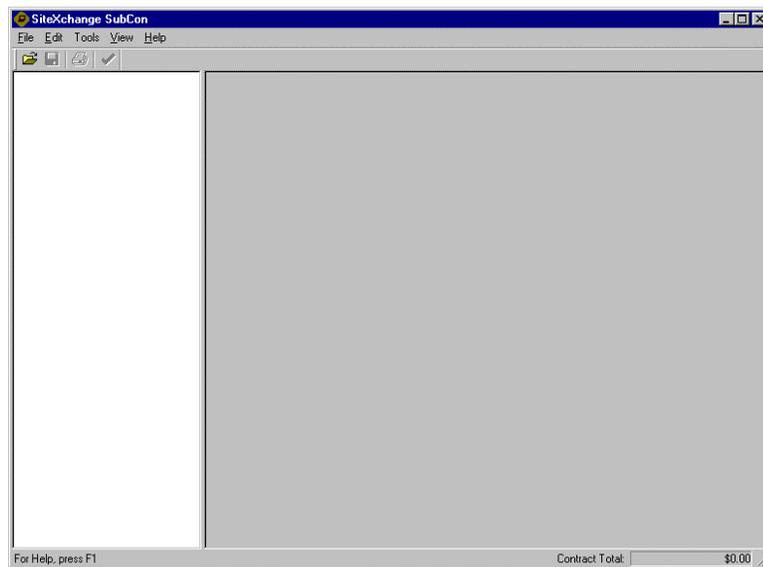


Figure 4-2. Expedite SubCon Window

## 4.3 Using Buttons and Menus to Invoke Commands

Most SubCon windows have title bars, menu bars, and button bars so you can easily activate commands.

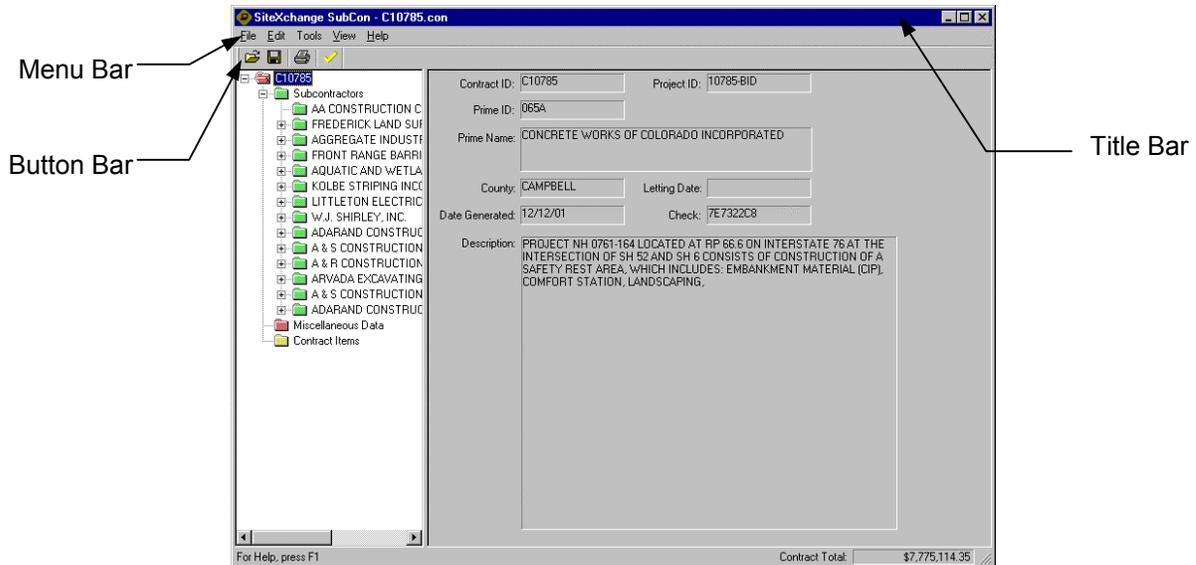


Figure 4-3. Typical SubCon Title, Menu, Button and Des Header Bars

### 4.3.1 Title Bar

The title bar contains the name of the application or window and buttons you can click to size, move, and close the window. In Windows, you can access the Control menu by clicking an icon in the upper-left corner of the window that represents the application in which you are working. In SubCon this icon will look like a small yellow triangle enclosing the letters SUB.

An easier way to manipulate the window is to use the three buttons in the upper-right corner of the window. The X button closes the application completely, the middle button either reduces the size of the window to its intermediate size or maximizes the window from its intermediate size, and the \_ button minimizes the application and displays it on the Windows taskbar.

### 4.3.2 Menu Bar

The menu bar (which includes the File, Edit, Tools, View, and Help menus) contains the names of menus of commands. Dimmed (grayed) menus are not available for the active window. You can click on a menu name to display all available commands for that menu and then click on the command to activate it.

Below the menu bar is the button bar, which contains buttons for some of the most useful commands from the menus. The buttons available on this bar depend on the window that is open. In other words, the button bar is context specific.

Select SubCon commands in one of these ways:

- Click on the menu name to display the menu items available from that menu. From there, select the command you want to run. For example, you could select **Open** from the **File** menu,
- Click on one of the buttons on the button bar to begin working with one of the major groups of data. For example, you could click on the OPEN CONTRACT button and SubCon would display the Open Proposal window.

## 4.4 Opening a Contract File

To open a contract file, select **Open** from the **File** menu. SubCon displays the Open Contract window.

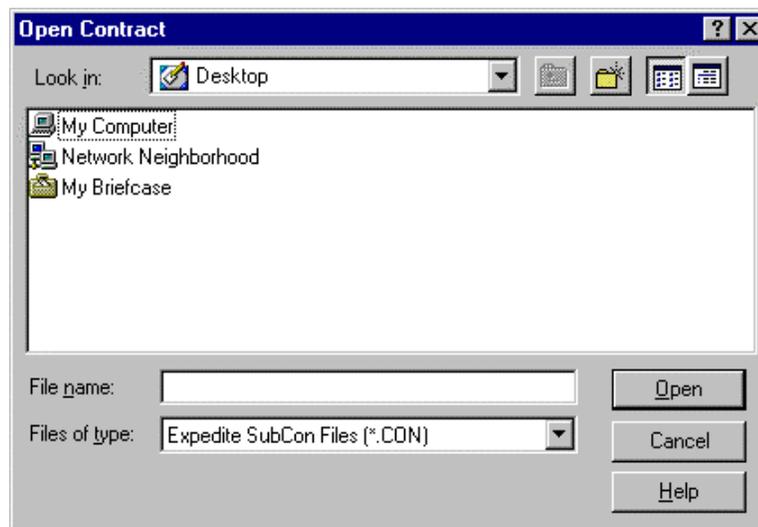


Figure 4-4. Open Contract Window

Browse to the directory where the contract data file you want to import is located. Select the file you want to import and click the OPEN button.

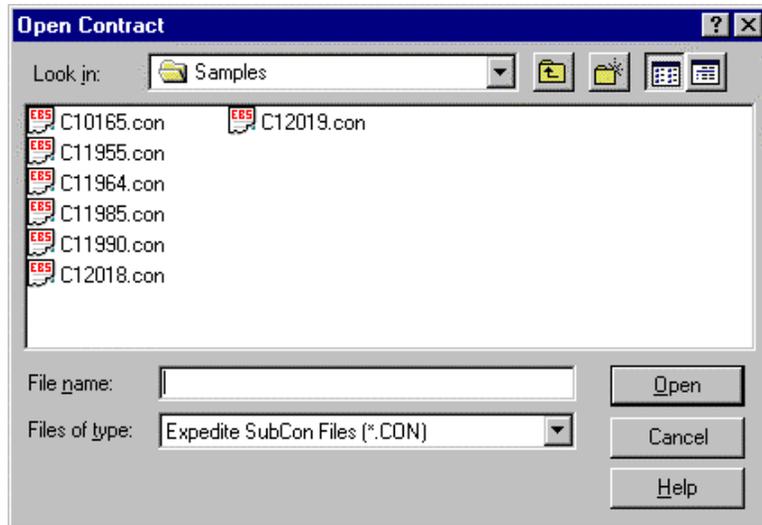


Figure 4-5. Contract Data Files

SubCon displays the main window with the contract identified in the title bar. The left pane of the window displays a tree view of the contract information and the right pane displays general information about the contract.

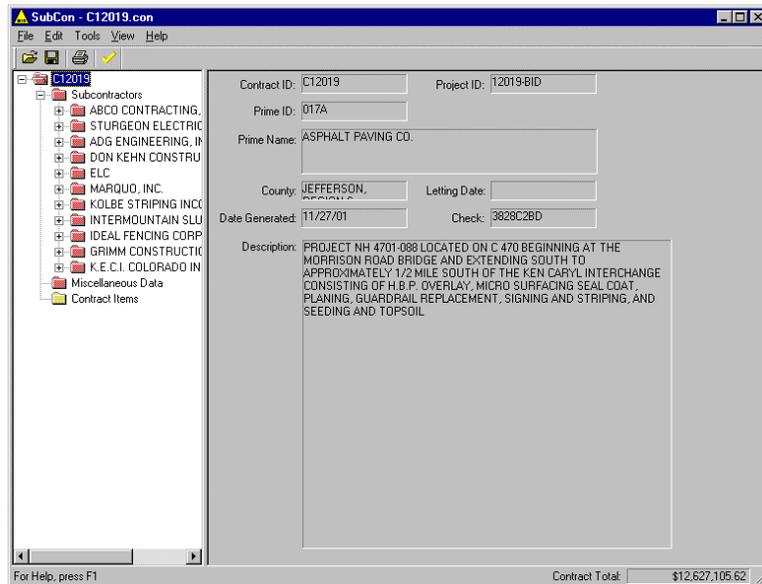


Figure 4-6. Contract Window

You can adjust the width of the panes by placing the cursor over the border between the two panes until the cursor turns into a line with arrows on each end. Press the left mouse button and drag left or right to adjust the width of the panes. The panes maintain these new widths until you change them again.

When a contract is first opened, the contract folder is displayed in the left pane of the contract window, but the folder is closed. To the left of the folder icon is a plus box [+].

Click on the plus box [+] to expand the tree view hierarchy for that contract. Notice that the plus box [+] has changed to a minus box [-]. You can collapse the tree view again by clicking the minus box [-].

Clicking on any folder in the hierarchy will open that folder and display related information in the right pane of the contract window. The tree view contains a folder for each subcontractor in the contract, including nested subcontractors.

Each subcontractor folder has a corresponding Items folder containing a list of all the contract items assigned to that subcontractor, if that subcontractor uses subcontract items.

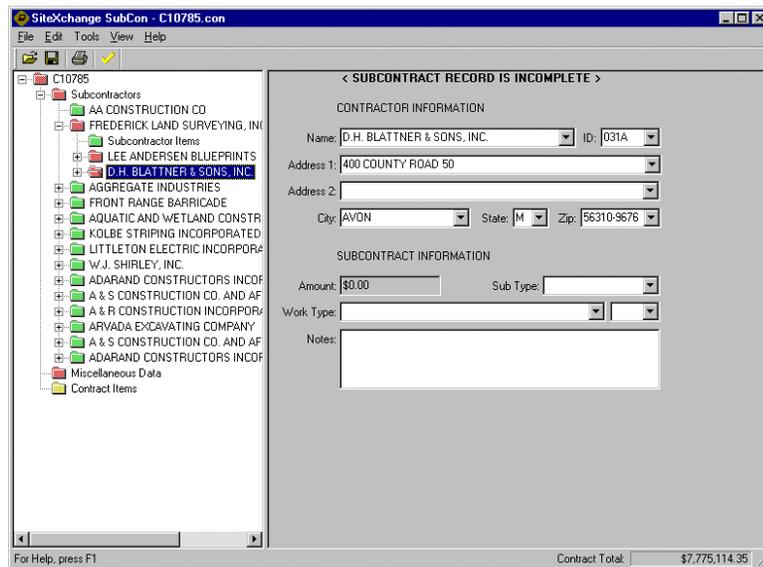


Figure 4-7. SubCon Extended Tree View

The folders in the tree view are color coded: a green folder indicates that it contains valid, error-free information; a yellow folder indicates that it contains information with warnings; and a red folder contains information with errors.

## 4.5 Managing Subcontract Information

You can add, change and delete subcontract information in the Contract window.

### 4.5.1 Adding Subcontract Information

To add a subcontractor to the contract, click on the contract folder in the tree view and select **Add Subcontractor** from the **Edit** menu. You can also add a subcontractor by clicking on the Subcontractors folder and selecting **Add Subcontractor** from the right mouse button menu.

SubCon adds a new folder to the list of subcontractors for the contract in the left pane and displays text boxes for adding new subcontract information in the right pane.

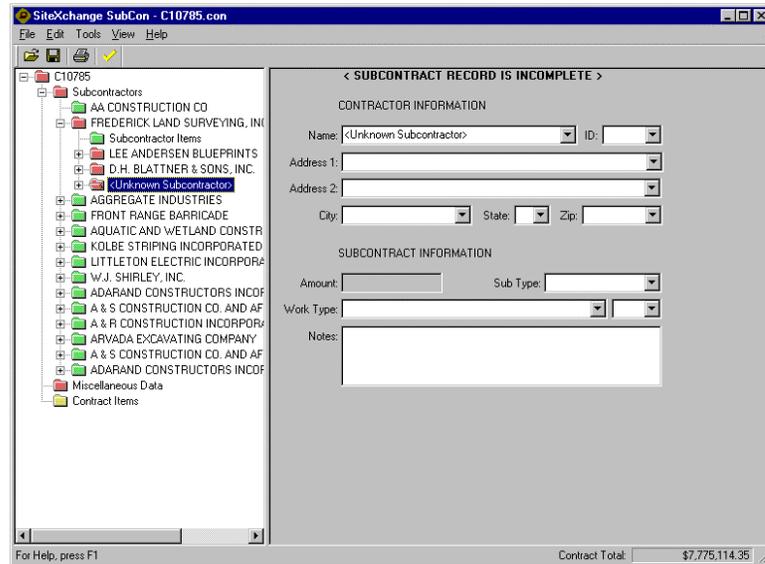


Figure 4-8. New Subcontractor Folder in Tree View

To add the new subcontractor, enter the subcontractor's name or click the down arrow to display a list of registered vendors. If you enter the first letters of a name that already exists in the list, SubCon will automatically advance the list to that name. Click on the name to select it and SubCon enters information for that vendor into the remaining text boxes. You can also select a vendor by entering the vendor's ID number in the ID text box, or the vendor's address in the Address text box. If the name of the new vendor is not in the list, type the name in the Name text box and press TAB to move to the next text box. In the left pane, SubCon adds the vendor's name to the new subcontractor folder.

Complete the subcontractor record by entering information into these remaining fields:

**Sub Type** This field contains a list of valid codes for subcontractor classifications. Certain sub types require that a subcontract amount be used instead of contract items to calculate the bid. When these sub types are chosen, you must also enter an amount in the Subcontract Amount field to create a complete record.

**Type of Work** This field contains a list of valid codes for work classifications. The choices available depend on the selected subcontractor.

**Notes** Miscellaneous comments may be added to the record in this field. These are not used in processing.

Select **Save** from the **File** menu to save the new subcontractor record.

Depending on how the option is set in the SubGen configuration file, you may be able to add nested subcontractors to the contract. SubCon adds a new subfolder in the left pane. Follow the steps described above to complete the new subcontractor record.

If nested subcontractors are not allowed, all subcontractor folders appear at the same level in the tree.

### 4.5.2 Changing Subcontract Information

To change information for a subcontractor, click on the subcontractor folder in the left pane and in the right pane, edit the information in the text boxes. Select **Save** from the **File** menu to save your work.

- 📄 **Note:** Depending on an option in the SubGen configuration file, you may not be able to change information for subcontractor records that were imported from SiteManager.

### 4.5.3 Deleting Subcontract Information

To delete a subcontractor from the list of subcontractors for this contract, select the subcontractor folder in the left pane and choose **Delete Subcontractor** from the **Edit** menu or the right mouse button menu. SubCon displays a Delete Confirmation window.

Click YES to complete the delete or NO to return to the window without deleting the subcontractor. Select **Save** from the **File** menu to save your work.

- 📄 **Note:** Depending on an option in the SubGen configuration file, you may not be able to delete a subcontractor record that was imported from SiteManager.

## 4.6 Managing Subcontract Items, Item Quantities, and Prices

When you have finished adding a new subcontractor to the contract, you can now begin to define the items on which that vendor will work. To assign items to a subcontractor, click on the Subcontractor Items folder for that subcontractor.

- 📄 **Note:** If the subcontractor is of a sub type that does not use items, SubCon will not create an Items folder for that subcontractor. For these subcontractors, you must instead enter an amount in the Subcontract Amount field.

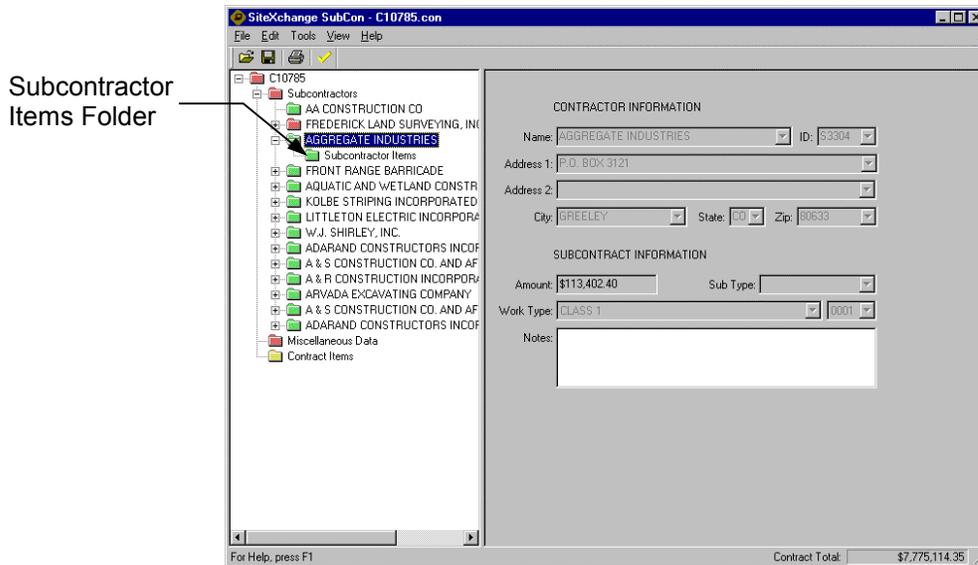


Figure 4-9. Subcontractor Items Folder

SubCon displays the Subcontractor Items window.

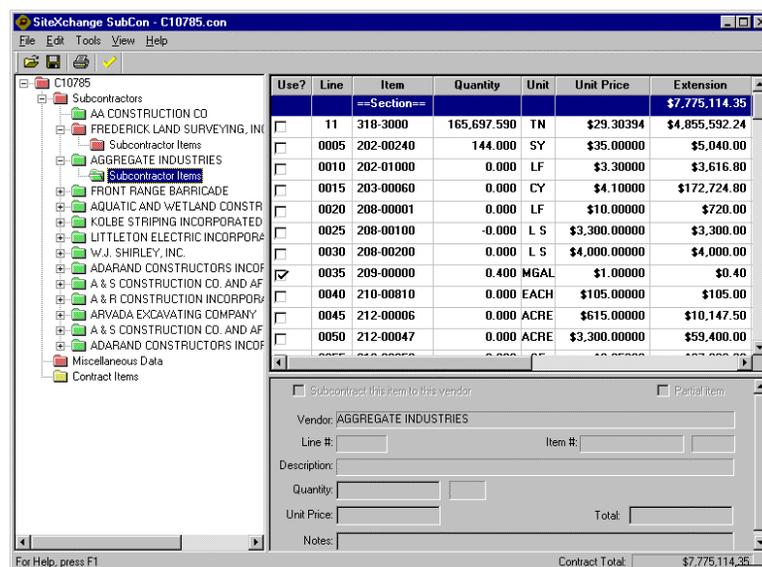


Figure 4-10. Subcontractor Items Window

The window is divided into two sections:

- The upper section of the window contains a scrollable list of all the items that can be subcontracted. The list is organized by section and line numbers. The items that are not assigned to the selected subcontractor appear dimmed.

- The lower section of the window contains information about the item currently selected in the list. You can add, change, or delete the quantity, unit price, and total cost information for the selected item. You can also add miscellaneous information in the Note field.

To subcontract an item to a vendor, select the item from the list in the upper section of the Subcontractor Item window, and either click the check box in the Use? column in the upper section of the window or the check box labeled **Subcontract this item to this vendor** in the lower section of the window.

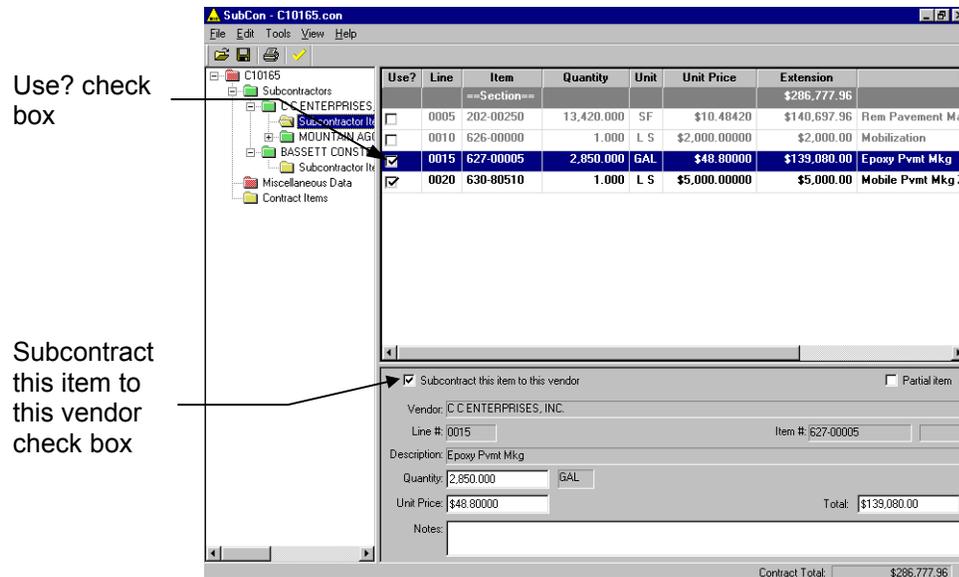


Figure 4-11. Check Box for Subcontracting Line Items

To delete an item, select the item in the upper section of the window and clear either the Use? check box or the **Subcontract this item to this vendor** check box.

**Note:** You cannot delete a subcontract item record that was created in SiteManager and imported into SubCon.

When you select an item in the upper section of the window, SubCon displays information about the selected item in the lower half of the window. You can add, change and delete information in these fields:

### Quantity

SubCon calculates the quantity for the item as the remaining quantity not already assigned to other subcontractors. Partial items are not included in this calculation. You can change the quantity by clicking in the Quantity field and editing the value.

### Unit Price

SubCon displays the awarded contract item unit price in the Unit Price field, but you can change this value at any time. If you change the unit price, SubCon recalculates the Total by multiplying the new unit price by the quantity.

**Total** SubCon automatically calculates the extended amount shown in the Total field as the product of the quantity and the unit price. You can also change this value, in which case SubCon will recalculate the quantity by dividing the new extended amount by the unit price. If the extended amount for a subcontract item exceeds the extended amount for the contract item, SubCon displays a warning message.

- 📄 **Note:** You can use math formulas to enter information in any numeric field. The formula evaluates immediately when you leave the field and is not stored.

When you have finished entering information for the item, select **Save** from the **File** menu to save your work. SubCon automatically checks to make sure you have entered information for all of the item's required fields, and displays an error message if any information is missing.

Depending on the options that have been selected in your SubGen configuration file, and whether the item record was created in SubCon or imported from SiteManager, SubCon may also perform these checks on the item quantities you have entered:

- A check to make sure you have not entered an item quantity that exceeds the contract item quantity.
- A check to make sure the quantity you entered does not fall below the amount that was assigned in SiteManager.
- If the subcontractor does not use items, a check to make sure the subcontractor amount does not fall below the amount assigned in SiteManager.

SubCon displays an error message if any of these quantity checks fail.

#### 4.6.1 Using Partial Items

*Partial items* are items that are not constrained by SubCon's usual quantity checks and whose quantities are not included in determining minimums and maximums. An item may be designated as a partial item when the total quantity for that item is assigned to more than one subcontractor, thereby avoiding what SubCon would otherwise identify as a quantity error.

As an example, suppose one of the items in a contract is 2,000 pounds of asphalt. Two subcontractors are being used, one to supply the asphalt and the other to deliver it to the construction site. You can resolve this situation in one of these two ways:

- By designating the item as a partial item and assigning the total quantity of 2,000 pounds of asphalt to both of the subcontractors. This will not cause an error because SubCon will not include this item in its quantity checks.

- By assigning a quantity of 1,000 pounds to each of the subcontractors. In this case, do **not** designate the item as a partial item.

To designate an item as a partial item, select the item in the Subcontractor Items window and click the Partial Item check box in the detail area of the window.

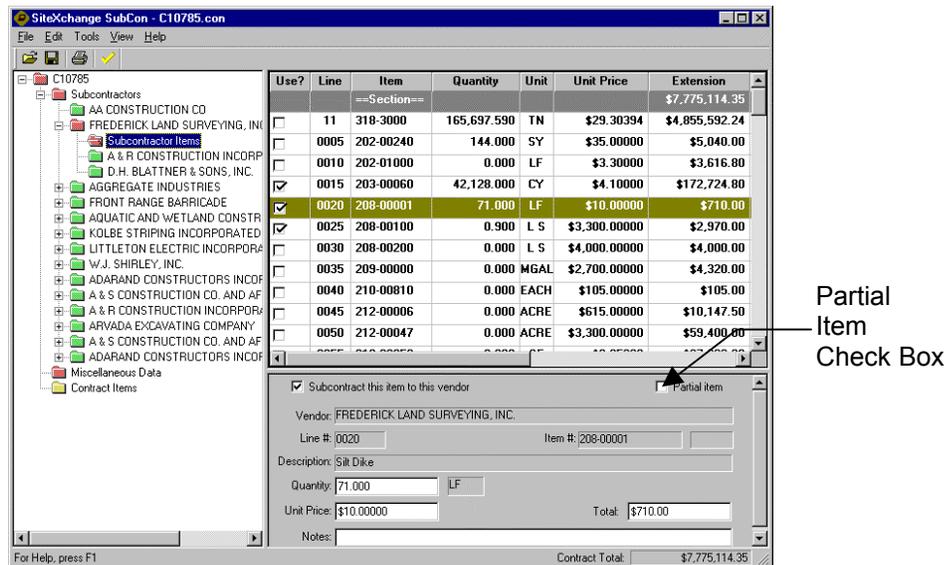


Figure 4-12. Partial Items Check Box

- Note:** You cannot designate a subcontract item that was created in SiteManager and imported into SubCon as a partial item.

## 4.7 Printing a Schedule of Items Report

The Schedule of Items report is a listing of all the items you have subcontracted to a particular vendor. Follow these steps to print this report for a vendor:

- In the left pane of the Subcontractor Items window, select the Subcontractor folder for the vendor.
- Section **Print** from the **File** menu. If any errors exist in the subcontractor record, SubCon displays a Contract Error window.
- SubCon displays a Print Option window. Select printing parameters and click OK.

## 4.8 Using SubCon Options

You have several options available to you for SubCon. To set SubCon options, select **Options** from the **Tools** menu. SubCon displays a SubCon Options window.

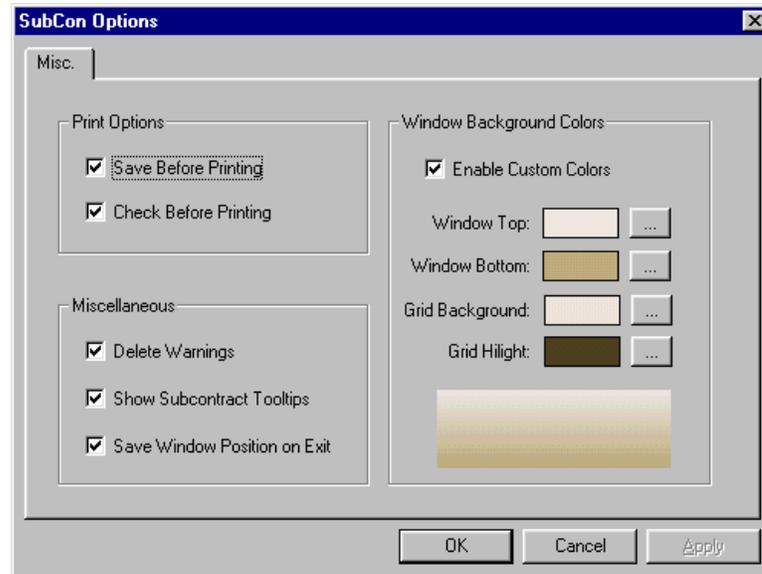


Figure 4-13. SubCon Options Window

The window displays options in four groups of checkboxes. When you have finished selecting options, click the **APPLY** button to immediately apply your choices and **OK** to close the Options window or click **CANCEL** to close the window without saving your changes.

