



Subcontractor 2.0 DBE Review

The purpose of this flow is to walk users in the DBE group through reviewing a Subcontractor Approval record.

- T2020TEST - Home
- Tasks
- Drafts
- Notifications
- Directory
- Support
- General
- ADA Guidance ...
- CC List
- Contacts
- Project Locations
- Project Vendors
- Project Numbe...
- Project Inform...
- Field Requ...
- Project Co...
- Project Esti...
- Project Nat...
- Project Sch...
- Project We...

DeDOT > DOTS > T2020TEST

Project E

STEP 1/21

Click the + symbol to open a new project

+ Create

Item	Description	Fiscal Year Obligated	Status	Creation Date	Creator	Record No.
		0.00	Active	04/02/2024 09:56 AM	Rose Coleman	PRJEST-0004
		0.00	Active	04/02/2024 09:48 AM	Cheryl DeGraff	PRJEST-0002
		0.00	Active	04/02/2024 09:55 AM	Rose Coleman	PRJEST-0003
	Construction Engineering Estimate	0.00	Active	04/01/2024 03:26 PM	Rose Coleman	PRJEST-0001

Total: 4

Self Help

Search by Name or Number...

- Recent Locations**
- T2020TEST
 - T202400160
 - TEST20221024
 - T202201601
 - T202304902
 - T202304903
 - T202466303
 - T209901999
 - T202366305
 - T202301101
 - T202300801
 - T201609002
 - TEST2019051200
 - T201800402
 - DelDOT
 - M&O
 - T202003402
 - T201607002
 - T202207704
 - T201707108

- Key Locations**
- Company Workspace
 - DelDOT
- Bookmarks**
- No items to display.

STEP 2/21

Type the **Project Name** or **Number** or select from the **Recent Locations**

Click Next to proceed

Next →

					Record No.
<input type="checkbox"/>				eman	PRJEST-0004
<input type="checkbox"/>	Active	04/02/2024 09:40 AM	Cheryl DeGraff		PRJEST-0002
<input type="checkbox"/>	Active	04/02/2024 09:55 AM	Rose Coleman		PRJEST-0003
<input type="checkbox"/>	Active	04/01/2024 03:26 PM	Rose Coleman		PRJEST-0001

Self Help

Project Sch...
Project We...
3

Total: 4

Subcontractor Approval

+ Create Actions Bulk Update View: All Records [edit] [refresh] [print] [search] [list] [help]

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
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STEP 3/21

Click Construction Phase

Click Next if already open

[← Back](#) [Next →](#)



Total: 0

Self Help

- TEST20221024 - Home
- Tasks
- Drafts
- Notifications
- Directory
- Support >
- General >
- Design Phase >
- Construction Phase >
- Field >
- Contract Admini... >
- Construction Ge... >
- Document Manager >
- Reports >
- Admin >

DeDOT > TEST20221024

Subcontractor Approval

+ Create Actions Bulk Update View: All Records [edit] [refresh] [print] [search] [list] [help]

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
------------	-------------	-----------	-------------	--------------	--------	---------	---------------

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
Total: 0							

STEP 4/21

Click Contract Administration

Click Next if already open

[← Back](#) [Next →](#)

3

Navigation icons: back, home, forward

Self Help

STEP 6/21

Double click the applicable record. The status will be 'In_AE_Review' or 'In_DBE_Review'

[← Back](#)

- T2020TEST - Home
- Tasks
- Drafts
- Notifications
- Directory
- Support
- General
- Design Phase
- Construction Phase
- Field
- Contract Admi...
- Notice to P...
- Contracts -...
- Change Or...
- Contractor...
- General Co...
- Pencil Esti...
- Progress Es...
- Project Clo...
- Price Appr...
- Request for...
- Subcontract...

Subcontractor Approva

+ Create Actions Bulk U

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
SA-0001	3-D Fabrication, Inc	3DFI		T2020TEST	In_Review	Rose Colem...	04/25/2024 02:50 PM

Total: 1

Record Details Workflow Progress Attachments

Contract Info

Contract Reference: T2020TEST Original Contract Amount: 8,847,777.00

Revised Contract Amount: 8,970,271.39

CC Information

CC List

Subcontractor Record Type

Please choose one of the following:

- In Master List - the subcontractor exists in Unifier and needs to be added to the project.
- Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master list and the project.

Note: If unsure, please select in master and search for the vendor before selecting add to master list.

Subcontractor Record Type

Vendor Details

Vendor: Vendor ID: 3DFI

Vendor Name: 3-D Fabrication, Inc Project Vendor Type

DBE? Third Tier Sub?

Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Task Details

From
Rose Coleman

To
Bradley Damtoft;Cassidy Blowers;Cheryl DeGraff;Company Administrator;Diane Calloway;Jacqueline Johnston;Jie Huang;Karynn Butler;Kyle Pickett;Lim Tan;Prath Mehta;Rose...

Sent For
Review

Contract Info

Contract Reference ⓘ	Original Contract Amount
T2020TEST	8,847,777.00
	Revised Contract Amount
	8,970,271.39

CC Information

CC List ⓘ

Subcontractor Record Type

Please choose one of the following:

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Note: If unsure, please select in master and search for the vendor before selecting add to master list.

Subcontractor Record Type ⓘ

In Master List Add to Master List

Vendor Details

Vendor	Vendor ID ⓘ
<input type="text"/>	3DFI
Project Vendor Type ⓘ	

Attachments Comments Linked Records

STEP 7/21

Click **Accept**

← Back



Information
No Attachments.

Self Help

Contract Info

Contract Reference: T2020TEST

Original Contract Amount: []

Revised Contract Amount: []

Subcontractor Record Type

Please choose one of the following:

- In Master List - the subcontractor exists in Unifier and needs to be added to the project.
- Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master list and the project.

Note: If unsure, please select in master and search for the vendor before selecting add to master list.

Subcontractor Record Type: In Master List Add to Master List

CC Information

CC List: [Type a CC List Name...]

Vendor Details

Vendor: ACKBAY

Vendor Name: Ackerman & Baynes LLC

Vendor ID: ACKBAY

Project Vendor Type: Sub-Contractor

DBE?: Yes

Third Tier Sub?: No

Race Conscious:

Second Tier Sub: []

Is Contract Attached?

Is FHWA 1273 Attached?

STEP 8/21

Review the subcontractor agreement and any additional documents attached to this record.

If the business license and registry certificate within the Unifier Master Lists are valid, they are not required to be attached.

Click Next to proceed

← Back Next →

Attachments Comments Linked Records Linked Mail Workflow Progress Audit Log

Unpublished Attachments

Name	Title	Pub. No.	Rev. No.
BP list and associated Group...			

Total: 1



Contract Info

Contract Reference	Original Contract Amount
T2020TEST	8,847,777.00
	Revised Contract Amount
	8,970,271.39

CC Information

CC List

ADA Guidance Request

Subcontractor Record Type

Please choose one of the following:

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- Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master list and the project.

Note: If unsure, please select in master and search for the vendor before selecting add to master list.

Subcontractor Record Type

In Master List Add to Master List

Vendor Details

Vendor	Vendor ID
ACKBAY	ACKBAY
Vendor Name	Project Vendor Type
Ackerman & Baynes LLC	Sub-Contractor
DBE?	Third Tier Sub?
Yes	No
<input type="checkbox"/> Race Conscious	Second Tier Sub

STEP 9/21

Scroll and review the information entered by the and Project Manager

Click Next to proceed

← Back Next →

Workflow Progress Audit Log

Pub. No. Rev. No.

Self Help

Total: 1



STEP 10/21

Click **Bid Pay Items** to review any items added to this record

Contractor Registry Certificate #
547893

Certificate Expiration Date
05/30/2024

Business Lic. Expiration Date
05/24/2024

Is Business License Attached?
 Yes No

Is Registry Certificate Attached?
 Yes No

Letter Details

Letter Non-Excluded 0.00

Previous \$ Subcontracted 0.00

% of Contract Subcontracted 0


Letter Excluded Amount 0.00

Previous Excluded Amount 0.00

Total Excluded Amount 0.00

Total \$ Subcontracted 0.00

Letter Details



Name	Pub. No.	Rev. No.
Unpublished Attachments		
<input checked="" type="checkbox"/> BP list and associated Grou...		

Total: 1

Self Help

No.	Pay Item	Section	Pay Item Name	Agreement Quantity	Agreement Unit Price	Item Subtotal
001				0	0.00	0.00



STEP 11/21

Review the **Bid Pay items**, as needed by clicking on each line and reviewing the information to the right

Click **Next** to proceed

Next →

Exclude?

Item Details

Agreement UOM	Unit of Measure
<input type="text"/>	<input type="text"/>
Agreement Quantity	Quantity
<input type="text" value="0"/>	<input type="text" value="0"/>
Agreement Unit Price	Item Unit Cost
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Item Subtotal	
<input type="text" value="0.00"/>	

Comments

Remarks



No.	Agreement Quantity	Agreement Unit Price	Item Subtotal
001	0	0.00	0.00

STEP 12/21

Click the **Non-Bid Pay Items** detail form

General

Pay Item Number

Pay Item Name

Pay Item

Section

Exclude?

Item Details

Agreement UOM Unit of Measure

Agreement Quantity Quantity

Agreement Unit Price Item Unit Cost

Item Subtotal

Comments

Remarks

Self Help





No.	Non-bid Pay Item - Suffix	Existing Section	Existing Pay Item Name	Existing Pay Item Desc	Existing UOM	Agreement Quantity	Agreement Unit Pr
-----	---------------------------	------------------	------------------------	------------------------	--------------	--------------------	-------------------



STEP 13/21

Review the **Non-Bid Pay items**, as needed by clicking on each line and reviewing the information to the right

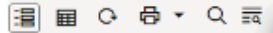
Click *Next* to proceed

Next →



Information
No line items are available.





No. Non-bid Pay Item Suffix

STEP 14/21

Click **Address** to review the addresses provided

Existing UOM Agreement Quantity Agreement Unit Pr

Self help



Information
No line items are available.



No.	Address 1	Address 2	City	State/Province
001	4211 Erdman Avenue		Baltimore	MD



STEP 15/21

Review the addresses provided

Click *Next* to proceed

Next →



Contact Details

First Name	Last Name
<input type="text"/>	<input type="text"/>
Title	Email
<input type="text"/>	<input type="text"/>
Mobile Phone	Work Phone
<input type="text"/>	<input type="text"/>

STEP 16/21

Pay Item Name	Agreement Quantity	Agreement Unit Price	Item Subtotal
	0	0.00	0.00

Click **Subcontractor Approval** to return to the upper form

General

Pay Item Number

Pay Item Name

Pay Item

Section

Exclude?

Item Details

Agreement UOM	Unit of Measure
Agreement Quantity	Quantity
Agreement Unit Price	Item Unit Cost
Item Subtotal	

Comments

Remarks



Self Help

Yes No Yes No

Remarks
Remarks

Letter Details

Letter Non-Excluded 0.00

Previous \$ Subcontracted 0.00

% of Contract Subcontracted 0

Letter Excluded Amount 0.00

Previous Excluded Amount 0.00

Total Excluded Amount 0.00

Total \$ Subcontracted 0.00

Letter Details

Record Information

in Only

Attachments Comments Linked Records Linked Mail Workflow Progress Audit Log

STEP 17/21

Click **Comments** if additional information is needed on this record, or if the record should be sent back to the record creator for revisions.

Click **Next** if no comments are needed. Clicking Next will move this flow to the next step.

← Back Next →

Title Pub. No. Rev. No.

Self Help

Total: 1

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Yes No Yes No

Remarks

Remarks

STEP 18/21

Add a detailed comment listing the required changes, then click **Post**

Click *Next* to proceed

[← Back](#) [Next →](#)

Letter Details

Letter Non-Excluded 0.00

Previous \$ Subcontracted 0.00

% of Contract Subcontracted 0

Letter Excluded Amount 0.00


Previous Excluded Amount 0.00

Total Excluded Amount 0.00

Total \$ Subcontracted 0.00

Letter Details

Rec Information

 **in Only**

Attachments Comments **Linked Records** Linked Mail Workflow Progress Audit Log


Information
No Comments are available.

Self Help

Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Contract Info

Contract Reference ⓘ	Original Contract Amount
<input type="text" value="000001"/>	<input type="text" value="0.00"/>
	Revised Contract Amount
	<input type="text" value="0.00"/>

CC Information

CC List ⓘ

Subcontractor Record Type

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2. Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master list and the project.

Note: If unsure, please select In Master List and search for the vendor before selecting add to master list.

Subcontractor Record Type ⓘ

In Master List Add to Master List

Vendor Details

Vendor ID ⓘ

Save Draft More Actions ▾ Send

STEP 19/21

Click **Send**

Attachments Comments Links



Information
No Attachments.

Self Help

Subcontractor Approval

Subcontractor Approval

Bid Pay Items

Non-Bid Pay Items

Add

Contract Info

Contract Reference ⓘ

000001

CC Information

CC List ⓘ

Subcontractor Record Type

Please choose one of the following:

1. In Master List - the subcontractor exists in Unifier and needs to be added
2. Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added

Note: If unsure, please select In Master List and search for the vendor before adding.

Subcontractor Record Type ⓘ

- In Master List Add to Master List

Subcontractor Details

Workflow Action Details

Action Details

Workflow Actions *

Send For

Select

STEP 20/21

Select the applicable workflow action, then click *Next*

Next →



Information
No Attachments.

Cancel

Send

Self Help

Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Add

Contract Info

Contract Reference ⓘ

000001

CC Information

CC List ⓘ

Subcontractor Record Type

Please choose one of the following:

1. In Master List - the subcontractor exists in Unifier and needs to be added
 2. Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added
- Note: If unsure, please select In Master List and search for the vendor before adding.

Subcontractor Record Type ⓘ

In Master List Add to Master List

Subcontractor Details

Save Draft More Actions Send

Documents Linked Records Linked Mail Workflow Progress > [Full Screen]

Self Help [Help Icon]

Workflow Action Details

Action Details

Workflow Actions *

Submit

Send For

AE Review

To

Cassidy Blowers;Karynn Butler;Kyle Pickett;Sushanth Moram;Area Engineers

Due Date Details

Task Due Date



Task Due Date is not available



Information
No Attachments.

STEP 21/21
Click **Send**

Cancel Send

Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Add

Contract Info

Contract Reference ⓘ

000001

CC Information

CC List ⓘ

Subcontractor Record Type

Please choose one of the following:

1. In Master List - the subcontractor exists in Unifier and needs to be added
2. Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added

Note: If unsure, please select In Master List and search for the vendor below

Subcontractor Record Type ⓘ

In Master List Add to Master List

Subcontractor Details

Workflow Action Details

✕

▼ Action Details

Workflow Actions ^{*} Send For

Submit AE Review

To

Cassidy Blowers;Karynn Butler;Kyle Pickett;Sushanth Moram;Area Engineers

▼ Due Date Details

Task Due Date

Cancel Send

You have completed this task.

Save Draft More Actions Send

Documents Linked Records Linked Mail Workflow Progress

Self Help



Information
No Attachments

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