



## **Subcontractor Approval 3.0 Area Engineer & Group Engineer Review**

The purpose of this flow is to walk users in the Area Engineer and Group Engineer groups 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 Requi...
  - Project Co...
  - Project Esti...
  - Project Not...
  - Project Sch...
  - Project We...

DeDOT > DOTS > T2020TEST

### Project E

STEP 1/24

Click the + symbol to open a new project

+ Create

		tion	Fiscal Year Obligated	Status	Creation Date	Creator	Record No.
	0.00	<input type="checkbox"/>		Active	04/02/2024 09:56 AM	Rose Coleman	PRJEST-0004
	0.00	<input type="checkbox"/>		Active	04/02/2024 09:48 AM	Cheryl DeGraff	PRJEST-0002
	0.00	<input type="checkbox"/>		Active	04/02/2024 09:55 AM	Rose Coleman	PRJEST-0003
	0.00	<input type="checkbox"/>		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 2/24**

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

*Click Next to proceed*

**Next →**

					Record No.
<input type="checkbox"/>		Active	04/02/2024 09:48 AM	Rose Coleman	PRJEST-0004
<input type="checkbox"/>		Active	04/02/2024 09:55 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...  
Total: 4

- TEST20221024 - Home
- Tasks
- Drafts
- Notifications
- Directory
- Support >
- General >
- Design Phase >
- Construction Phase**
- Document Manager >
- Reports >
- Admin >

DWIDGT > TEST20221024

### Subcontractor Approval

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

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

STEP 3/24

**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

DelDOT > TEST20221024

### Subcontractor Approval

+ Create Actions Bulk Update View: All Records

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

STEP 4/24

**Click Contract Administration**

Click Next if already open

← Back Next →

Total: 0

Self Help



- Notifications
- Directory
- Support
- General
- Design Phase
- Construction Phase
  - Field
  - Contract Admin...
  - Notice to P...
  - Contracts ...
  - Change Or...
  - Contractor'...
  - General Co...
  - Pencil Estl...
  - Progress Es...
  - Project Clo...
  - Price Appr...
  - Request for...
  - Subcontract...**
  - Submittals
  - Time Charg...
  - Construction G...

## Subcontractor Approval

+ Create Actions Bulk Update View: All Records [Edit] [Refresh] [Print] [Search] [Filter] [Help]

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

STEP 5/24

**Click Subcontractor Approval**

Click Next of already open

[← Back](#) [Next →](#)

Total: 0

Self Help

Double click the applicable record. The status will be 'In\_AE\_Review' or 'In\_GE\_Review'

← Back

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



### Subcontractor Approva

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	Original Contract Amount
T2020TEST	8,847,777.00
	Revised Contract Amount
	0,970,271.39

#### 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	Project Vendor Type
3-D Fabrication, Inc	
DBE?	Third Tier Sub?

Self Help

# Subcontractor Approval

Decline

More

Optional Step

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 ⓘ

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:

1. In Master List - the subcontractor exists in Unifier and needs to be added to the project.
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 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 ⓘ

3DFI

Project Vendor Type ⓘ

3 D Education, Inc

Attachments

Comments

Linked Records

STEP 7/24

Click **Accept**

← Back



Information  
No Attachments.

Self Help



**Contract Info**

Contract Reference

Original Contract Agreement

Revised Contract Agreement

**Subcontractor Record Type**

Please choose one of the following:

1. In Master List - the subcontractor exists in Unifier and needs to be added to the project.
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 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

**Vendor Details**

Vendor

Vendor ID

Vendor Name

Project Vendor Type

DBE?

Third Tier Sub?

Race Conscious

Second Tier Sub

Is Contract Attached?

Is FHWA 1273 Attached?

STEP 8/24

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

Name	Title	Pub. No.	Rev. No.
Unpublished Attachments			
<input checked="" type="checkbox"/> BF list and associated Group...			

Total: 1

Self Help

# Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Race Conscious ⓘ

Is Subcontract Attached?  Yes  No

Is FHWA 1273 Attached?  Yes  No

FHWA Participation

**Remarks**

Remarks

**License Information**

All vendors require a current business license and contractor registry certificate.

If the vendor has a current business license and/or contractor registry certificate entered in Unifier, those license numbers and expiration dates will be populated. If any of the data is not populated, it will need to be entered before the record can be submitted. If either has expired, a current copy will need to be provided.

Contractor Registry Certificate information can be found at <http://contractorregistry.delaware.gov>

Business License No. ⓘ Contractor Registry Certificate No.

5306 123456

Attachments 0 Comments Linked Records Linked Mail Workflow Pr > [ ]

Unpublished Attachments

Name	Title
STEP 9/24	
Provide a remark for this record, if applicable	
Click Next to proceed	
<a href="#">← Back</a>	<a href="#">Next →</a>

Total: 1

Self Help

# Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Total Excluded Amount 0.00

Total \$ Subcontracted 0.00

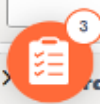
CC List \*  Required

Letter Details

**Subcontractor Rejection Justification**

Is Subcontractor Rejected? \*  Required

Justification

 **Card Information**

Attachments Comments Linked Records Linked Mail Workflow Pr

STEP 10/24

**Area Engineers, select the applicable CC List.**

**Group Engineers will review only.**

A CC List record must be created for this project before it can be selected on this record.

Click Next to proceed

[← Back](#) [Next →](#)

Total: 1

Self Help

# Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Total Excluded Amount 0.00

Total \$ Subcontracted 0.00

CC List \* ADA Guidance Request

Letter Details

**Subcontractor Rejection Justification**

Is Subcontractor Rejected? \* Select Required

Justification

**Additional Information**

Attachments Comments Linked Records Linked Mail Workflow Pr

Name	Title
STEP 11/24	
Area Engineer, add <b>Letter Details</b> , if applicable.	
<b>Group Engineers, review information only</b>	
Click Next to proceed	
← Back	Next →

Total: 1

Self Help

# Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Total Excluded Amount 0.00

Total \$ Subcontracted 0.00

CC List \*  
ADA Guidance Request

Letter Details

**Subcontractor Rejection Justification**

Is Subcontractor Rejected? \*  
Select

Justification

**Additional Information**

Attachments 0 Comments Linked Records Linked Mail Workflow Pr

Name	Title
Unpublished Attachments	
Subcontractor Approval Bu...	

STEP 12/24

Provide a response for the 'Is Subcontractor Rejected?' field. If the subcontractor is rejected, a justification will need to be provided.

Click Next to proceed

Back Next

Total: 1

STEP 13/24

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

Business Lic. Expiration Date: 05/24/2024

Is Business License Attached?  Yes  No

Contractor Registry Certificate #: 547893

Certificate Expiration Date: 05/30/2024

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

Self help

Total: 1

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



STEP 14/24

Review the Bid Pay items, then click Next to proceed

**Next** →



Section

Exclude?

**Item Details**

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

**Comments**

Remarks

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

STEP 15/24

Click **Non-Bid Pay Items** to review the items that were added to this record

**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 16/24

Review the Non-bid pay items, then click *Next* to proceed

**Next** →



Information  
No line items are available.





STEP 17/24  
Click **Address** to review the addresses provided

No.	Non-bid Pay Item Suffix	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 18/24**

Review the addresses provided and make updates, as needed

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"/>

# Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

STEP 19/24 Add Actions

Click **Subcontractor Approval** to return to the Upper form and leave a comment  
If no comment is needed, click **Next** to proceed.  
**Next** →

City	State/Province
WILMINGTON	DE

Line Item Details Attachments Linked Records

Address 1 3629 OLD CAPITOL TRL STE A  
City WILMINGTON  
Address 2  
State/Province DE  
Address 3  
Zip Code 198086025

**Contact Details**  
First Name Last Name  
Title Email  
Mobile Phone Work Phone

Cancel Save Save & Add New

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**

**Print Only**

STEP 20/24

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

[← Back](#)

Self Help

Total: 1

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Yes  No  Yes  No

Remarks

Remarks

STEP 21/24

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

Click *Next* to proceed

← Back Next →

Letter Details

Letter Non-Excluded

Previous \$ Subcontracted

% of Contract Subcontracted

Letter Excluded Amount

Previous Excluded Amount

Total Excluded Amount

Total \$ Subcontracted

Letter Details

Recent Information

in Only



Attachments Comments Linked Records Linked Mail Workflow Progress Audit Log

Self Help



Information  
No Comments are available.

# Subcontractor Approval

Save Draft More Actions **Send**

Subcontractor Approval Bid Pay Items Non-Bid Pay Items **Address**

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



Line Item Details Attachments Linked R

STEP 22/24

**Click Send**

Address 1 \*  
4211 Erdman Avenue Baltimore

Address 2  
State/Province \*  
MD

Address 3  
Zip Code \*  
21213

**Contact Details**

First Name  
Last Name

Title  
Email

Mobile Phone  
Work Phone

Cancel Save Save & Add New

Self Help

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

### Workflow Action Details

▼ Action Details

Workflow Actions \* Send For

Select

Cancel Send

STEP 23/24

Select the applicable **Workflow Action**

Click **Next** to proceed

**Next** →

MD

Zip Code \*  
21213

Details

Last Name

Email

Work Phone



Cancel Save Save & Add New



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

### Workflow Action Details

Workflow Actions: **Submit** Send For: Estimator Review

To: [Kyle Pickett/Estimators](#)

Due Date Details

Task Due Date

**i**  
Task Due Date is not available

Cancel Send

Save Draft More Actions Send

Attachments Linked Records

City: Baltimore

State/Province: MD

Zip Code: 21213

Self Help

Details

Last Name: [ ]

Email: [ ]

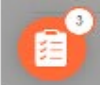
Work Phone: [ ]

Cancel Save Save & Add New

STEP 24/24

Click **Send**

← Back



No.	Address 1	Address 2	City	State/Pr
101	4211 Indian Avenue		Baltimore	MD

### Workflow Action Details

Workflow Actions: Submit

Send For: Estimator Review

To: Kyle Pickett@estimators

Task Due Date

**i**  
Task Due Date is not available

Cancel Send

Attachments Linked Records

City: Baltimore

State/Province: MD

Zip Code: 21213

Last Name

Email

Work Phone

Self Help

You have completed this task.

