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Getting Started

Introduction

This training guide and the Virginia Department of Transportation (VDOT) database allow you to practice using AASHTOWare Project Civil Rights & Labor™. References to the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users are included to obtain more information.

⚠️ Note: AASHTOWare Project Civil Rights & Labor 3.01 is a later version of Trns•port CRLMS 2.02, after rebranding.

Please note that depending on the policies, system configurations, and roles at your agency, you may not have access to all of the AASHTOWare Project Civil Rights & Labor™ functionality shown in this training guide.

AASHTOWare Project™ is the American Association of State Highway and Transportation Officials’ information system for managing transportation programs. It is an integrated software system used by transportation agencies to support highway construction management activities.

AASHTOWare Project Civil Rights & Labor is a comprehensive web-based application that allows agencies to receive and process the data required to meet federal and state requirements for civil rights and labor compliance activities. The collection of this information in one unified software application improves the quality of the information, eliminates duplicate data entry, and significantly reduces the time and effort to perform important tasks such as federal reporting, disparity studies, and data analysis (e.g. payrolls).
AASHTOWare Project Civil Rights & Labor allows for the effective administration of an agency’s external civil rights and labor compliance activities such as contractor payrolls and labor compliance, wage decisions, Disadvantaged Business Enterprise (DBE) certification, vendor data management, DBE commitments, On-the-Job Trainees (OJT) tracking and monitoring, subcontractor data and prompt payment tracking, bidder/quoter submittals, and trucking types and tracking.

Functionality and security is also available to allow non-agency users (e.g. contractors and subcontractors) to access AASHTOWare Project Civil Rights & Labor to submit electronic payroll, and subcontractor payment information.

**Setting Up Your Browser**

Because AASHTOWare Project Civil Rights & Labor is a web-based application, correct browser settings are an important part of making sure the application performs as it should. The information in this topic will help you to set your web browser options correctly.

**Using the Correct Browser**

Web-based AASHTOWare Project is designed to run on Google Chrome, Microsoft Edge, or Internet Explorer version 11 (IE11). If you are using Internet Explorer, make sure you update your browser to this version.

**Setting the Browser Mode in Internet Explorer**

If you will use Internet Explorer, after you complete this training and before you use AASHTOWare Project on your own computer, see the Setting Up Your Browser section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users and set your browser mode.
Exercise 1

In this exercise, you will ensure the browser mode is properly set in Internet Explorer.

1. Open the Internet Explorer browser.
2. Press the Alt key to display the toolbar.
3. From the Tools menu, select Compatibility View Settings.

   The browser opens a Compatibility View Settings dialog window.

4. In the Compatibility View Settings window, clear the Display intranet sites in Compatibility View check box.
5. Click the Close button.
Setting Internet Options in Internet Explorer

If you will use Internet Explorer, after you complete this training and before you use AASHTOWare Project on your own computer, see the Setting Internet Options section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users and set your internet options and enable your Data Object Model (DOM) storage.

⚠️ Note: If the icons in the system do not display properly, perform one of the following actions:
- Set the Internet Explorer option for Font Download to Enable (Open Internet Options. On the Security tab, select the Custom level button. Scroll to Downloads > Font download, and select Enable.)
- Add the AASHTOWare Project website to the list of Trusted Sites

![Figure 2. Setting Internet Options](image)
Exercise 2

In this exercise, you will ensure the browser internet options are properly set and that the DOM storage is enabled.

1. Open the Internet Explorer browser.
2. Navigate to the Tools menu, and select Internet Options.

   The browser displays the Internet Options dialog box.
3. Under Browsing History, click the Settings button.

   The browser displays the Temporary Internet Files and History Settings dialog box.
4. For the Check for newer versions of stored pages setting, click the Every time I visit the webpage option.
5. Click the OK button.
6. In the Internet Options dialog box, click the Advanced tab.
7. In the Settings box, scroll down to the Security section, and ensure the Enable DOM Storage option is selected.
8. Click the OK button.
Configuring Browser Settings for Microsoft Edge

For user interface elements to be displayed properly in Microsoft Edge, settings for touch and mouse events must be configured correctly.

Exercise 3

To verify or update the settings in your Microsoft Edge browser:

1. Open the Microsoft Edge browser.
2. In the address bar, type about:flags.
3. On the Developer Settings page, scroll to and select the Touch section.
4. Under Touch events, ensure that the Enable touch events field is set to either Always on or Only on when a touchscreen is detected.
5. Under Mouse events for touch, ensure that the Fire compatible mouse events in response to the tap gesture field is set to either Always on or Only on when touch is enabled.
6. If you made changes, close the browser to allow the changes to take effect.
Logging On

AASHTOWare Project Civil Rights & Labor is a web-based application. Start AASHTOWare Project Civil Rights & Labor by opening a web browser and entering the address of the program.

⚠️ Note: You will receive your agency’s AASHTOWare Project Civil Rights & Labor website link after your account is approved and created.

![Figure 3. Logging On](image)
In this exercise, you will log on to AASHTOWare Project Civil Rights & Labor and select the active role.

Username: **CRL.PRIMEXX**    Password: **Virginia!**
Role: **EXTPRIMEPAYROLL**    Vendor: **Smithton**

1. In Internet Explorer, navigate to the AASHTOWare Project Civil Rights & Labor web address supplied by your instructor.
2. In the **Username** field, type **CRL.PRIMEXX** (Note: XX is your user number).
3. In the **Password** field, type **Virginia!**.
4. In the **Domain** field, click the drop-down arrow and select **AUTH Users**.
5. Click the **Log On** button.
6. Click the **Home** drop-down arrow and select the **EXTPRIMEPAYROLL** role.
Using Online Help

The AASHTOWare Project Help system provides a wealth of information immediately available to you while you work. Understanding how the Help system works makes it easier to find the information you need.

When you access the context sensitive Help, the system displays information for the current component, with no further searching needed.

For more information, see the Using Online Help section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

Searching in Online Help

The Search pane provides a rapid full-text search of all the topics in the Help system. For more information, see the Search section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

⚠️ Note: If your search phrase includes words that can be mistaken for the operators Or, And, or Not, place your search terms in quotation marks. For example, if you want to search for information on the tab “Bids Not On Proposal”, place the tab name in quotation marks. Otherwise the search will not return the desired results.

⚠️ Note: At VDOT, the Help system can be accessed with the link: http://aashtocrlstrain.cov.virginia.gov/Help/AASHTOWare_Project_Help.htm
Welcome to Web-Based AASHTOWare Project™ Help

Welcome to the web-based AASHTOWare Project Help system. If you are new to this application, the information on this page will help you understand how the Help system works.

The Help system is context sensitive, which means that when you click the Help button on a component in the software, the system provides information on the functionality of that component only. Each Help page provides links to other Help pages containing related information.

Contents

The Help system also contains many topics that are more general in nature and not linked to a specific component in the software. You can navigate the entire Help system by clicking the Contents link in the top left corner of any Help page to open the Help explorer. You can search the entire Help system by typing your search criteria in the Search box on the toolbar and clicking the Go button.

The Contents pane is organized by business category and uses expandable and collapsible books and pages to display the list of topics available in the Help system. This pane helps you navigate through the Help hierarchy to find a desired category and subject.

Click a book to expand it and then click the page you want to see. The system displays the page in the right pane of the browser window.

Search

The Search pane provides a rapid full-text search of all the topics in the online Help. To perform a search, type your search criteria in the Search input field on the toolbar and click the Go button. To search for a phrase, enclose the phrase in quotes in the Search field.

The system performs the search and automatically opens the Search pane, which displays a list of the topics in which the search text appears. Topics are ranked in order of best match. Click a topic to display the page in the right pane of the browser window.

You can also perform a search in the Search pane itself by clicking on the Search tab.

To make your first experiences with the system easier and more intuitive, you might also want to explore the Help system by clicking on the Help button on a component in the software.

Figure 4. AASHTOWare Project Civil Rights & Labor Online Help
Exercise 5

In this exercise, you will view the Online Help.

Username: CRL.PRIMEXX       Password: Virginia!
Role: EXTPRIMEPAYROLL       Vendor: Smithton

1. From the homepage, click the system Help button.
2. Click the Glossary link.
3. The Glossary folder expands; click the Glossary link.
5. To access the context sensitive help, click the Vendor Payrolls component Help button.
6. At the bottom of the page, click the related topic Working with Contract Vendor Payrolls link.
7. Close the Help window.
8. Click the Unapproved Payrolls component Help button.
9. At the bottom of the page, click the related topic Maintaining a Payroll Record link.
Navigating in Web-Based AASHTOWare Project™

AASHTOWare Project components and webpages include a variety of features to help you navigate more easily through the system. The features described in this section are standard throughout the system.

For more information, see the Navigating in Web-Based AASHTOWare Project section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

Dashboard
When you log on to the system, the software opens on the dashboard. You can also go to the dashboard at any time by clicking the Home button on the Menu bar. The dashboard contains one or more components. Each component is identified by a title set within a header bar. Each component provides access to the information and processes required for a specific area of your agency's work.

Menu bar
The system displays the Menu bar at the top of every webpage in the system. The buttons and menus on this bar help you to move quickly through the system to visit the pages and components you use most often.

Quick Links
Quick links are displayed below the Menu bar and above the webpage title. These links allow you to quickly jump to application pages related to the current page.

Hypertext Links
Hypertext links can be located anywhere on an application component or webpage and are identified by underlined text. When clicked, a link takes you to another component or page, usually one containing more detailed information than what is available in the current component.

Icons
Icons are small images throughout the system that either convey information or can be clicked to perform an action. For example, a red asterisk icon indicates a required field. An eraser icon in a Quick Find search box can be clicked to reset search criteria.

Alternate Paths
Keep in mind that all of the various navigational elements, such as hypertext links, quick links, previous pages, and Actions menus, can all provide different ways of accomplishing the same task. The same command might be accessible from an Actions menu or as a link.

Bookmarks
You can bookmark specific pages in the software just as you would for any other website.
Figure 5. Sample Dashboard
Logging Off

You can log off the system at any time by clicking the Log off button on the Menu bar on any page in the application. When you log off, the system ends your session and takes you to the logon page.

Exercise 6

In this exercise, you will log off the system.

Username: CRL.PRIMEXX  Password: Virginia!
Role: EXTPRIMEPAYROLL  Vendor: Smithton

1. On the Menu bar, click the Log off button.

Understanding Your Role

A user role is a name associated with a collection of security access rights to the information contained in system components. Roles combine the permissions needed for several related tasks and allow you more efficient access to the parts of the system you need. Roles are designed and assigned to you by your agency.

Depending on the work you perform for your firm, you may have one or more roles. You can switch your role at any time while working in the application.

For more information, see the Understanding Your Role section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.
Exercise 7

In this exercise, you will view and change your active role.

Username: CRL.PRIMEXX       Password: Virginia!
Role: EXTSUBPAYMENT       Vendor: Smithton

1. In the Username field, type CRL.PRIMEXX (Note: XX is your user number).
2. In the Password field, type Virginia!.
3. In the Domain field, click the drop-down arrow and select AUTH Users.
4. Click the Log On button.
5. Click the Home drop-down arrow. Note that you are currently in the EXTPRIMEPAYROLL role.
6. Click the **EXTSUBPAYMENT** role.

### Viewing Previous Activity

The Previous functionality allows you to return to pages and components that you previously visited in the system for your active role.

For more information, see the *Viewing Previous Activity* section in the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

![Figure 7. Viewing Previous Activity](image)
Exercise 8

In this exercise, you will view and maintain previous activity.

Username: **CRL.PRIMEXX**  
Password: **Virginia!**
Role: **EXTSUBPAYMENT**  
Vendor: **Smithton**

1. Click the *Previous* button to return to the last page you visited in the system in your active role.

2. On the *Previous* button, click the drop-down arrow.

3. If applicable, from the list of previous windows, select the entry for the appropriate window to which to navigate.
Viewing My Pages

The My Page Overview component contains a list of all the pages you have added to your My Pages list for your active role. This component functions similarly to a list of favorites in a browser.

For more information, see the Viewing My Pages section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

Figure 8. My Page Overview
Exercise 9

In this exercise, you will view and maintain My Pages.

Username: CRL.PRIMEXX          Password: Virginia!
Role:  EXTSUBPAYMENT          Vendor: Smithton

1. On the My Pages button, click the drop-down arrow.
   
   You can click Remember this Page on pages in the system to add a link to this list.

2. Click the Close button in the My Pages pop-up window.

3. Click the My Pages button.

4. Click the Home drop-down arrow.

5. Click your User ID.

6. Click the Home button.
Using Components

The web-based AASHTOWare Project Civil Rights & Labor system displays information in application components. A component is a container for the information and business functions on an application webpage. Components are made up of elements such as fields, lists, and links. Some components contain a list of tabs along the left side, each of which corresponds to a subset of information related to the component entity.

⚠️ Note: To protect the information contained in the VDOT system, components and webpages only display the information and action features for which your active role has been assigned access.

For more information, see the Using Components section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

Component features include:

- Component header with Save, Actions, and Help button
- Vertical Scroll Bar
- Fields
- Lists
- Filters
- Actions menus
- Modal windows
- Tabs
<table>
<thead>
<tr>
<th>Contract</th>
<th>Description</th>
<th>Prime ID</th>
<th>Prime Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTRAIN01</td>
<td>GRADE, DRAIN, ASP, PAVE, AND GU</td>
<td>Z525</td>
<td>Smithton Road Company</td>
</tr>
<tr>
<td>CONTRAIN02</td>
<td>GRADE, DRAIN, ASP, PAVE, AND GU</td>
<td>Z525</td>
<td>Smithton Road Company</td>
</tr>
<tr>
<td>CONTRAIN03</td>
<td>GRADE, DRAIN, ASP, PAVE, AND GU</td>
<td>Z525</td>
<td>Smithton Road Company</td>
</tr>
<tr>
<td>CONTRAIN04</td>
<td>GRADE, DRAIN, ASP, PAVE, AND GU</td>
<td>Z525</td>
<td>Smithton Road Company</td>
</tr>
<tr>
<td>CONTRAIN05</td>
<td>GRADE, DRAIN, ASP, PAVE, AND GU</td>
<td>Z525</td>
<td>Smithton Road Company</td>
</tr>
<tr>
<td>CONTRAIN06</td>
<td>GRADE, DRAIN, ASP, PAVE, AND GU</td>
<td>Z525</td>
<td>Smithton Road Company</td>
</tr>
<tr>
<td>CONTRAIN07</td>
<td>GRADE, DRAIN, ASP, PAVE, AND GU</td>
<td>Z525</td>
<td>Smithton Road Company</td>
</tr>
<tr>
<td>CONTRAIN08</td>
<td>GRADE, DRAIN, ASP, PAVE, AND GU</td>
<td>Z525</td>
<td>Smithton Road Company</td>
</tr>
<tr>
<td>CONTRAIN09</td>
<td>GRADE, DRAIN, ASP, PAVE, AND GU</td>
<td>Z525</td>
<td>Smithton Road Company</td>
</tr>
</tbody>
</table>

Figure 9. Overview Component Example
**Working with Fields**

Fields are the most common element found on components. Information can be recorded in fields. You can move from one field to another by pressing the Tab key or moving your pointer to the field and clicking the left mouse button. The system has several different types of fields, as described below.

For more information, see the *Working with Fields* section in the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Text Boxes</strong></td>
<td>Directly type or delete information.</td>
</tr>
<tr>
<td><strong>Numeric Fields</strong></td>
<td>Numeric fields allow only numeric characters.</td>
</tr>
<tr>
<td><strong>Auto-complete Fields</strong></td>
<td>Auto-complete fields are similar to text boxes except that they automatically display a filtered list of field values based on the first few characters typed into the field.</td>
</tr>
<tr>
<td><strong>Date Fields</strong></td>
<td>Date fields include a calendar button next to the field. Click the calendar button to display a calendar and select a date to populate the field.</td>
</tr>
<tr>
<td><strong>Drop-down List Boxes</strong></td>
<td>Drop-down list boxes include a down arrow next to the field. Click the drop-down arrow to display a list of possible field values.</td>
</tr>
<tr>
<td><strong>Non-editable Fields</strong></td>
<td>Non-editable fields display information without a text box. The information cannot be changed.</td>
</tr>
<tr>
<td><strong>Check boxes</strong></td>
<td>Check boxes are square boxes that can be selected or cleared by positioning the mouse pointer over them and clicking the left mouse button. Check boxes are used to turn an option on or off.</td>
</tr>
<tr>
<td><strong>Agency Fields</strong></td>
<td>Agency fields look and behave like any other field, but have been customized for purposes specific to an agency.</td>
</tr>
</tbody>
</table>
### Working with Lists

Many system components contain lists of rows for a type of data, such as payrolls or payments. You can browse list information using the scroll bar on the right side of the component. The system has several different types of lists, as described below.

For more information, see the `Lists` section in the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Simple Lists</strong></td>
<td>These are read-only lists of information. If the rows in a simple list contain enough information, they may be collapsed or expanded.</td>
</tr>
<tr>
<td><strong>Rolling Lists</strong></td>
<td>These typically contain only a few fields, and no more than two lines of information per row. Rolling lists are used for quick entry, maintenance, or view.</td>
</tr>
<tr>
<td><strong>Accordion Lists</strong></td>
<td>Used to manage rows that require input into more fields than allowed in a rolling list. A row in an accordion list can be expanded or collapsed by clicking the expand/collapse button.</td>
</tr>
<tr>
<td><strong>Grouped Lists</strong></td>
<td>Some components allow data in lists to be grouped relative to a field from that list.</td>
</tr>
<tr>
<td><strong>Grouped Associations</strong></td>
<td>Grouped associations are similar to grouped lists, except that the data is grouped according to an association between multiple entities, not a field contained in the list.</td>
</tr>
<tr>
<td><strong>Selection Lists</strong></td>
<td>To select a single data row, click anywhere inside the row. The system adds a check mark beside each row you select and shades the row. To cancel a selection, click the selected row again.</td>
</tr>
</tbody>
</table>

Figure 10. Simple List Example

Figure 11. Accordion List Example
Exercise 10

In this exercise, you will view the different types of list components and view a tabbed component.

Username: CRL.Primexx  Password: Virginia!
Role: EXTPRIMEPAYROLL  Vendor: Smithton

1. Click the Home drop-down arrow. Click the EXTPRIMEPAYROLL role.

2. Under the Vendor Payrolls component, in the Quick Find search box, type TRAINXX (Note: XX is your user number).

3. View the vendor payrolls displayed in a simple list.

4. For CONTRAINXX and Z525 Smithton Road Company, click the row Actions button.

5. Click the Open action.

6. View the payroll displayed in another example of a simple list.

7. Click payroll 1.

8. Click the Employee quick link.

9. Scroll through the Employees component.

10. View the records for Ronald Curtis displayed as an accordion list.

11. Click the Home button.
**Sorting and Filtering Lists**

System components with lists allow you to sort and filter the list to make it easier to find specific rows. You can create advanced sorts and filters that search on multiple criteria.

For more information, see the *Sorting and Filtering Lists* section in the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

**Using the Quick Find Search Box**

A Quick Find search box is standard on each component that contains a list. It searches all rows in the list for a string of text and then displays only rows with fields containing that string.

⚠️ **Note:** The Quick Find search is not case sensitive.

⚠️ **Note:** The word Temporary appears next to the Quick Find search field when a sort or filter is applied to the results list.

For more information, see the *Using the Quick Find Search Box* section in the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

**Using Advanced Sorting and Filters**

Every system component that contains a Quick Find search box provides an **Advanced** filter link that allows you to create and save custom sorts and filters that search on multiple criteria. Sorts and filters can be based on both visible and hidden fields for an entity.

Some field types may not be used as sort and filter criteria, including system generated IDs, code table descriptions in fields associated with a code table, counts that are not stored in the database, passwords, and fields that are a list of other fields.

For more information, see the *Using Advanced Filters and Sorts* section in the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*. 
In this exercise, you will filter the contract list using the Advanced Filter/Sort window.

Username: CRL.PRIMEXX  
Password: Virginia!  
Role: EXTSUBPAYMENT  
Vendor: Smithton

1. Click the Home drop-down arrow. Click the EXTSUBPAYMENT role.
2. Under the Contract Overview component, next to the Quick Find search box, click the Advanced link.
3. In the Filters section, click the drop-down arrow and select Contract ID.
4. Note that the second field displays Contains.
5. Click in the text box and type TRAIN.
6. In the Apply Settings section, in the Save as text box type TRAIN Contracts.
   
   Note that there is a 20 character limit for the setting name.
7. Click the Save and Apply button.
Exercise 12

In this exercise, you will sort the contract list using the Advanced Filter/Sort window.

Username: CRL.PRIMEXX        Password: Virginia!
Role:         EXTSUBPAYMENT          Vendor: Smithton

1. Next to the Quick Find search box, click the drop-down arrow.

   Note that System Default and TRAIN Contracts settings are listed.

2. Click the Advanced link.

3. In the Sort section, click the drop-down arrow and select Prime ID.

   In this example, all the contracts returned by this search have the same Prime Contractor.

4. In the Apply Settings section, click the Apply without saving link.
Modifying and Deleting Saved Settings

You can modify the filter and sort settings that you save.

For more information, see the Modifying Saved Settings section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

Exercise 13

In this exercise, you will delete the settings you created.

Username: CRL.PRIMEXX  
Password: Virginia!
Role: EXTSUBPAYMENT  
Vendor: Smithton

1. Next to the Quick Find search box, click the drop-down arrow.
   
   *Note that System Default, Temporary, and TRAIN Contracts settings are listed.*

2. Click the Advanced link.

3. In the Editing section, click the drop-down arrow and select TRAIN Contracts.

4. Click the Delete this setting link.

5. In the Editing section, click the drop-down arrow and select Temporary.

6. Click the Delete this setting link.

7. Click the Close button.
Using Actions Menus

Actions menus allow you to choose a function or process to perform on data. Actions menus are located throughout the application and are accessed by clicking an Actions button. The system has several different types of action menus, as described below.

For more information, see the Using Actions Menus section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

<table>
<thead>
<tr>
<th>System Actions Menu</th>
<th>The Actions menu for system-level functions and processes is located on the Menu bar, a horizontal strip at the top of every system webpage. Clicking the Actions button opens the Actions menu.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Component Actions Menus</td>
<td>Component Actions menus contain functions and processes that can be performed on the component level, for example, adding or importing a new project.</td>
</tr>
<tr>
<td>Row Actions Menus</td>
<td>Row Actions menus contain functions and processes that are performed on an individual data row in a list, for example, adding or deleting an item. The Actions button is located on the right side of each row. Row Actions menus on a worksheet list are different from those on other types of lists. For more information about row Actions menus on a worksheet, see the Working with Worksheets section in the AASHTOWare Project Civil Rights &amp; Labor™ User’s Guide for Non-Agency Users.</td>
</tr>
</tbody>
</table>
Figure 13. Actions Buttons
This page intentionally left blank.
Subcontractor Payments

Subcontractor Payment Overview

After the agency makes a payment to the prime contractor for work on the contract, the prime contractor is in turn responsible for paying the subcontractors and other vendors who performed the work. When the prime contractor has paid the subcontractors, those subcontractors are responsible for paying their own subcontractors and other vendors (suppliers, brokers, and truckers) who provided materials or services for contract work.

The general subcontract payment process follows these workflow steps:

- **Pending**: If you are the prime contractor, enter subcontract payment records for the work subcontractors performed for each estimate payment. To enter subcontract payments, first locate the contract payment from which the subcontract payment is being made. If you are a subcontractor entering payments made to other vendors, locate the appropriate subcontract payment for which you are the payee. Record the information required by VDOT for the payment. In addition to general information and any amounts being withheld, this might include work items or work types being paid. Sign each subcontract payment record.

- **Under Payee Review**: Payees on subcontract payments verify receipt of the subcontract payment.

- **Under Agency Review**: VDOT reviews the subcontract payment transactions.

- **Reviewed**: Subcontract payments have been reviewed. This is the end of the subcontract payment process.

For more information, see the *Subcontractor Payments* section in the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.*
Exercise 14

In this exercise, you will log on to the system and set your active role.

Username:  CRL.PRIMEXX    Password:  Virginia!
Role:  EXTSUBPAYMENT    Vendor:  Smithton

1. In Internet Explorer, navigate to the AASHTOWare Project Civil Rights & Labor web address supplied by your instructor.

2. In the Username field, type CRL.PRIMEXX  (Note: XX is your user number).

3. In the Password field, type Virginia!.

4. In the Domain field, click the drop-down arrow and select AUTH Users.

5. Click the Log On button.

6. Click the Home drop-down arrow. If not already selected, click the EXTSUBPAYMENT role.
Viewing Agency Contract Payments

The Contract Payment Overview component contains a list of all the payments the agency has paid to the prime contractor for the contract.

The Contract Payment Summary component contains all the information currently recorded for individual contract payments, including associated subcontract payments. All subcontract payments must originate from a contract payment paid to the prime contractor.

The Subcontract Payments tab lists subcontract payments from the prime contractor (prime as payer) to a subcontractor (subcontractor as payee). This tab also lists subcontract payments from the subcontractor (subcontractor as payer) to a second tier subcontractor (second tier subcontractor as payee).

⚠️ Note: Second tier subcontractors are also known as tiered subcontractors.

For more information, see the Viewing Agency Contract Payments section of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

Figure 14. Contract Payment Summary
Exercise 15

In this exercise, you will view an agency contract payment.

Username: CRL.PRIMEXX    Password: Virginia!
Role: EXTSUBPAYMENT    Vendor: Smithton

1. In the Contract Overview component, in the Quick Find search box, type TRAINXX (Note: XX is your user number).

2. For contract CONTRAINXX (Note: XX is your user number), click the row Actions button.

3. Click the Open Contract Payments task.

4. Click estimate number …0001.

5. View the information on the General tab.

6. Click the Subcontract Payments tab.

7. If necessary, in subcontract payment row for subcontractor z530 Slate Rock and Gravel Company, click the Expand/Collapse button to expand the record.

8. View the payment summary.
Viewing Subcontractor Payments

Subcontractor Payments can be accessed through the Contract Payment Summary component.

Figure 15. Review Subcontract Payment Summary – General Tab
Exercise 16

In this exercise, you will view a subcontractor payment.

Username: CRL.PRIMEXX     Password: Virginia!
Role: EXTSUBPAYMENT     Vendor: Smithton

1. In the subcontract payment row for subcontractor z530 Slate Rock and Gravel Company, click the row Actions button.

2. Click the Review Sub Contractor Paymt. Summary action.

3. View the information on the General tab.

   Note that the Paid Amount is displayed on the General tab. At VDOT, the Paid Amount is calculated from the sum of the Actual Payment amounts entered on the Items tab.

4. Click the Withholding tab and view the information.

   Note that at VDOT information will not be directly recorded on the Withholding tab. Any withholding information displayed here is summarized from the Items tab.

5. Click the Items tab and view the information.

   Note that the Actual Payment amounts recorded on the Items tab will be summed and displayed in the Paid Amount field on the General tab.

   Note that withholding information recorded on the Items tab will be summarized and displayed on the Withholding tab.

6. Click the Endorsements tab and view the information.

   Note that the payee and agency have reviewed this payment.
Adding a Subcontractor Payment from the Prime Contractor

The Add Subcontractor Payment component allows you to add general information for a new subcontractor payment. There are multiple ways to access the Add Subcontractor Payment component from the Subcontract Payments tab on the Contract Payment Summary component depending on the type of payment being made:

- To add a new subcontract payment from the prime, click **Add Subcontract Payment From Prime**.
- To add a new subcontract payment from the same payer, select **Add New Payment Same Payer** from the **Actions** menu on any subcontract payment row.

For more information, see the *Adding a Subcontractor Payment* section of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.*

Required fields are:

- Payee
- Payee Payment Number
- Date Paid
- Payment Type

⚠️ **Note:** The Paid Amount on the General tab can be left blank as it is calculated from the sum of the Actual Payment entries on the Items tab. If you record the Paid Amount here, it will be updated by the system to match the sum of the Actual Payment entries on the Items tab.

If you do not record Items or the Actual Payment entries on the Items tab, you will enter the Paid Amount on the General tab.

⚠️ **Note:** When the subcontractor's work is complete and accepted and/or previously withheld dollars are released, an additional subcontract payment record should be made to pay the withheld amounts to the subcontractor.
Exercise 17

In this exercise, you will add a new subcontract payment where the payer is a prime contractor.

Username: CRL.PRIMEXX  Password: Virginia!
Role: EXTSUBPAYMENT  Vendor: Smithton

1. Click the Contract Payment Overview quick link.
2. Click estimate number …0002.
3. Click the Subcontract Payments tab.
4. Click the Add Subcontract Payment From Prime link.
5. In the Payee field, type z530.
6. Click z530 Slate Rock and Gravel Company.
7. In the **Payee Payment Number** field, type **002**.

8. In the **Date Paid** field, enter **2/16/15**.

9. In the **Payment Type** field, click the drop-down arrow and select **Progress**.

   *Note that a final payment on this contract to this subcontractor should have a payment type of Final.*

10. Note that you would select the **Payee Work Complete Indicator** check box if the work associated with this subcontract payment has been completed.

11. Note that you did not enter the **Paid Amount** because you will enter the **Actual Payment** on the **Items** tab.

12. Click the **Save** button.
Adding a Subcontractor Payment Item

The Items tab on the Subcontract Payment Summary component contains a list of all the contract items that are being paid in this subcontract payment.

⚠️ **Note:** Withholding information that is saved on the Items tab will also be summarized on the Withholding tab.

⚠️ **Note:** When indicating that work is complete, the Payee Work Complete Indicator should be selected for each item.

⚠️ **Note:** When releasing previously withheld dollars, the Retainage Released Indicator should be selected for each item. In these subcontract payments, the Actual Payment field should equal the sum of all money withheld for each item of work type and the Retainage Dollars Held field should be blank.

For more information, see the *Maintaining Subcontractor Payment Items* section of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

Required fields are:

- Contract Item Line Number
- Quantity Paid
### Exercise 18

In this exercise, you will modify a subcontract payment by adding an item.

**Username:** CRL.PRIMEXX  
**Password:** Virginia!  
**Role:** EXTSUBPAYMENT  
**Vendor:** Smithton

1. Click the **Items** tab.
2. If necessary, click the **New** button.
3. In the **Contract Item Line Number** field, type **0160**.
4. Click **60404 Concrete Class A4**.
5. In the **Quantity Paid** field, type **36.00**.
6. In the **Actual Payment** field, type **17,900.00**.
7. In the **Payment or Partial Amount Withheld Indicator** field, select the checkbox.

8. In the **Partial Payment Comments** field, type *0160 - $100 withheld for punch list items completion – PRIME01*.

9. Click the **Save** button.

10. Click the **Withholding** tab.

11. Note that the withholding information you entered on the **Items** tab is displayed.
Signing a Subcontractor Payment

The payer must sign the subcontractor payment record to progress the payment through the process. When the payer signs the record, the subcontractor payment progresses to the subcontractor, who must verify that the payment was received.

The Sign Subcontract Payment component provides a guided process by which you review, verify and sign a subcontractor payment.

⚠️ Note: After you sign a subcontractor payment, it can no longer be changed or deleted.

For more information, see the Signing Subcontract Payments section of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

![Sign Subcontract Payment](image.png)

Figure 18. Sign Subcontract Payment
Exercise 19

In this exercise, you will sign a subcontract payment acting as a prime contractor payer.

Username: CRL.PRIMEXX    Password: Virginia!
Role: EXTSUBPAYMENT    Vendor: Smithton

1. Click the component Actions button.
2. Click the Sign Subcontract Payment task.
3. Review the Subcontract Payment Report information to ensure accuracy.
   
   *In training, you may need to refresh the page to view the report.*
4. Click the Next button.
5. Read the Verification Requirement information to verify that the subcontract payment has been made.
6. Click the Next button.
7. In the Signer Comments field, type Payment made – PRIMEXX (Note: XX is your user number).
8. Click the Sign Payment button.
9. Click the Log off button.
Adding a Subcontractor Payment from a Subcontractor

The Add Subcontractor Payment component allows you to add general information for a new subcontractor payment. There are multiple ways to access the Add Subcontractor Payment component from the Subcontract Payments tab on the Contract Payment Summary component depending on the type of payment being made:

- To add a new subcontract payment from the payee, select **Add New Payment From Payee** from the **Actions** menu on any subcontract payment row.
- To add a new subcontract payment from the same payer, select **Add New Payment Same Payer** from the **Actions** menu on any subcontract payment row.

For more information, see the *Adding a Subcontractor Payment* section of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

Required fields are:

- Payee
- Payee Payment Number
- Date Paid
- Payment Type
In this exercise, you will log on as a subcontractor, add a new subcontract payment and item, and sign the subcontractor payment.

Username: CRL.SUBXX  
Password: Virginia!  
Role: EXTSUBPAYMENT  
Vendor: Slate

1. In the Username field, type your training ID: CRL.SUBXX  (Note: XX is your user number).
2. In the Password field, type Virginia!.
3. In the Domain field, click the drop-down arrow and select AUTH Users.
4. Click the Log On button.
5. Click the Home drop-down arrow. If not already selected, click the EXTSUBPAYMENT role.
6. In the Quick Find search box, type TRAINXX. (Note: XX is your user number).
7. For CONTRAINXX, click the row Actions button and select the Open Contract Payments task. (Note: XX is your user number).

8. Click estimate number …0002.

9. Click the Subcontract Payments tab.

10. For payee z530 SLATE ROCK AND GRAVEL COMPANY, click the row Actions button.

11. Click the Add New Payment From Payee action.

12. In the Payee field, type Z579.

13. Click Z579 Keith Construction.

14. In the Payee Payment Number field, type 001.

15. In the Date Paid field, type 2/17/15.

13. In the Payment Type field, click the drop-down arrow and select Progress.

   Note that a final payment on this contract to this subcontractor should have a payment type of Final.

14. Note that you would select the Payee Work Complete Indicator check box if the work associated with this subcontract payment has been completed.

16. Click the Save button.

17. Click the Items tab.

18. If necessary, click the New button.

19. In the Contract Item Line Number field, type 0160.

20. Click 60404 Concrete Class A4.

21. In the Quantity Paid field, type 36.00.

22. In the Actual Payment field, type 16,000.00.

23. Click the Save button.

24. Click the component Actions button.

25. Click the Sign Subcontract Payment task.

26. Review the Subcontract Payment Report information to ensure accuracy.

27. Click the Next button.
28. Read the **Verification Requirement** information to verify that the subcontract payment has been made.

29. Click the **Next** button.

30. In the **Signer Comments** field, type **Payment made – SUBXX** (Note: XX is your user number).

31. Click the **Sign Payment** button.
Verifying Receipt of a Subcontractor Payment

The payee must verify the subcontract record information to complete the subcontractor payment process. When the payee verifies receipt, the agency then reviews the transaction to ensure it was made within the federal and state guidelines for a timely and accurate payment.

The Verify Payment component provides a guided process by which the payee can review and verify the subcontractor payment.

⚠️ Note: The system verifies that you are authorized to verify the subcontractor payment, sets the Payee Reviewed By field with your User ID and the Payee Reviewed Date with the current date.

⚠️ Note: All subcontractors must verify receipt of the subcontractor payment, whether you receive the subcontractor payment from the Prime contractor or another subcontractor.

⚠️ Note: You must add any subcontract payments to your tiered subcontractors prior to verifying receipt of your payment.

For more information, see the Verifying Receipt of a Subcontractor Payment section of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

Figure 20. Verify Payment
Exercise 21

In this exercise, you will verify receipt of a subcontract payment acting as a subcontractor payee.

Username:  CRL.SUBXX               Password:  Virginia!
Role:       EXTSUBPAYMENT          Vendor:    Slate

1. Click the Contract Payment quick link.
2. Click the Subcontract Payments tab.
3. For payer Z525 and payee z530 SLATE ROCK AND GRAVEL COMPANY, click the row Actions button.
4. Click the Verify Payment task.
5. Review the Subcontract Payment Report information to ensure accuracy. Click the Next button.
6. In the Payment Received field, click the drop-down arrow and select Yes Not as Expected.
7. In the Amount Received field, type 17,900.00.
8. In the Date Received field, type 2/17/15.
9. In the Payee Comments field, type Expected 18000 – SUBXX. (Note: XX is your user number).
10. Click the Next button.
11. Click the Submit Verification button.
12. Click the Log off button.
Contract Vendor Payrolls

Working with Contract Vendor Payrolls

A payroll is a vendor’s reporting of wages paid to employees for work on a specific agency contract during a given period of time. For each employee, the hours worked on each day for a given labor classification on a specific project must be reported. This is not a vendor’s payroll system for payment and payroll tax deduction purposes, but instead it is a record based on the output from a vendor’s payroll system.

When required by the agency, payrolls associated with the work performed must be recorded, reviewed, and approved by the agency. The approval process ensures that the calculations in the payroll are correct and that applicable federal and state guidelines for wages and fringe benefits have been followed.

For more information, see the Working with Contract Vendor Payrolls section of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.
Payroll Workflow

At VDOT, payroll information is initially entered by prime contractors and subcontractors either through direct data entry or by importing an electronic file. The agency then reviews the information contained in a payroll, and the payroll is progressed through the system.

⚠️ Note: You cannot change any information in a payroll progressed beyond the Initial phase unless a payroll is rejected by the prime contractor. Otherwise, you can only change information in the most recent modification for a payroll that is still in the Initial phase.

For more information, see the Payroll Workflow section of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.
Following is a more detailed description of the Payroll workflow:

**Initial Entry**

Payroll information is initially entered by prime contractors and subcontractors either through direct data entry or by importing electronic files. When a payroll in Initial status is signed, the system automatically progresses it to Under Agency Review status if the payroll vendor is the prime contractor for the contract; otherwise, the system progresses the payroll to the Under Prime Review status.

⚠️ **Note:** A prime contractor can enter a new payroll on behalf of one of his subcontractors.

**Under Prime Review**

During the Under Prime Review phase, prime contractors are responsible for reviewing subcontractor payrolls and progressing them to the next step in the process.

**Prime Returned**

If the prime contractor rejects the payroll during the Under Prime Review phase, the payroll has status of Prime Returned.

⚠️ **Note:** A subcontractor can return the payroll to Under Prime Review by adding a comment and signing the payroll again.

⚠️ **Note:** Alternately, a subcontractor can make changes to the payroll data and save the modified payroll. The system sets the payroll back to the Initial phase and it must be signed again.

**Under Agency Review**

During this phase, the agency reviews prime contractors’ and subcontractors’ payrolls.

**Agency Rejected**

A payroll enters this phase if the agency rejects the payroll during the Under Agency Review phase.

**Prime Rejected**

A payroll enters this phase when the prime contractor rejects a subcontractor’s payroll after it has been rejected by the agency.
**Sub Returned**

A payroll enters the Sub Returned phase after a subcontractor adds transition comments to a payroll in the Prime Rejected phase, and then returns the payroll to the prime contractor.

**Approved**

When an agency user reviews and approves a payroll, the payroll enters the Approved phase. Once approved, a payroll can only be changed by creating a payroll modification.

**Payroll Creation Methods**

There are two methods prime contractors and subcontractors can use for creating new payrolls in AASHTOWare Project Civil Rights & Labor. The payroll creation methods are as follows:

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Manual Entry</strong></td>
<td>Through the AASHTOWare Project Civil Rights &amp; Labor user interface, prime contractors and subcontractors can manually enter weekly payroll information.</td>
</tr>
<tr>
<td><strong>Importing a Payroll</strong></td>
<td>Using an XML file format that matches the required VDOT XML payroll schema, prime contractors and subcontractors can import weekly payroll information into AASHTOWare Project Civil Rights &amp; Labor.</td>
</tr>
</tbody>
</table>

For additional resources and information on generating an XML payroll file from a payroll system, please contact your agency or refer to the Cloverleaf website [https://xml.cloverleaf.net/resourcekit/](https://xml.cloverleaf.net/resourcekit/).

Contractors that are not able to generate an XML payroll file from their payroll system can use the VDOT Microsoft Excel spreadsheet to manually enter payroll data, and then convert it into a valid XML payroll file using the Cloverleaf website [https://xml.cloverleaf.net/spreadsheet/](https://xml.cloverleaf.net/spreadsheet/). This XML file can then be imported into AASHTOWare Project Civil Rights & Labor.

For additional resources and information on using the VDOT Microsoft Excel spreadsheet, converting it to a valid XML payroll file, and importing it into AASHTOWare Project Civil Rights & Labor, please contact VDOT or refer to the Cloverleaf website [https://xml.cloverleaf.net/resourcekit/](https://xml.cloverleaf.net/resourcekit/). VDOT will provide certain payroll-related information to the contractors for them to populate required, accurate payroll data.
Viewing a Contract Vendor Payroll

The Contract Certified Payroll Overview allows an external user to manage the information in a payroll. You can access the Contract Certified Payroll Overview component and locate a specific payroll.

See the section Managing Contract Vendor Payrolls of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users for more information about managing a payroll.

Figure 22. Contract Certified Payroll Overview
**Exercise 22**

In this exercise, you will view a list of existing payrolls for a particular vendor and contract.

Username:  **CRL.PRIMEXX**    Password:  **Virginia!**
Role:  **EXTPRIMEPAYROLL**    Vendor:  **Smithton**

1. In Internet Explorer, navigate to the AASHTOWare Project Civil Rights & Labor web address supplied by your instructor.

2. In the Username field, type **CRL.PRIMEXX** (Note: XX is your user number).

3. In the Password field, type **Virginia!**.

4. In the Domain field, click the drop-down arrow and select **AUTH Users**.

5. Click the Log On button.

6. Click the Home drop-down arrow. If not already selected, click the **EXTPRIMEPAYROLL** role.

7. Under the Vendor Payrolls component, in the Quick Find search box, type **TRAINXX** (Note: XX is your user number).

8. For contract **CONTRAINXX** (Note: XX is your user number) and vendor **Z525 Smithton Road Company**, click the Payrolls: link 1.

   *Note that this link will be updated by the system to match the number of payrolls for this vendor and contract.*

9. View the Begin Date and End Date for payroll 1.

10. From the Contract Certified Payroll Overview component, click the link for payroll 1.

11. Scroll down to view the Benefit Programs section.

12. Click the Employee quick link.

   *Note that information for Employee Ronald Curtis is displayed.*

13. Scroll down to the Classification section to view wage rates and classification information for the employee.

14. Scroll down to the Hours section to view work hours for the payroll period for the employee.
15. Scroll down to the **Wages** section to view wage and withholding information for the
payroll period for the employee.

16. Click the **Back to Top** button.

17. Click the **Status** quick link.

18. View the payroll **Phase** and **Agency Accepted Date**.

19. Scroll down to the **Transitions** section to view the transition dates and comments for the
payroll record.

20. Scroll down to the **Exceptions** section to view any comments from the agency indicating
information requiring further review or correction.

21. Scroll down to the **Employee Mismatches** section to view any mismatches between the
employee information in the payroll and the agency database.

22. Click the **Back to Top** button.

23. Click the **Log off** button.
Viewing VDOT Contractor Payroll Microsoft Excel Spreadsheets

At VDOT, contractors can manually enter the weekly payroll data into the VDOT Payroll Microsoft Excel spreadsheet. The spreadsheet will later be converted into a valid XML payroll file and imported into AASHTOWare Project Civil Rights & Labor.

Instead of starting each week from a blank VDOT Payroll Microsoft Excel spreadsheet, it may be helpful to create a template of the spreadsheet containing your general company information and recurring contract and employee information. The process of creating a template will be shown in the exercises that follow.

⚠️ **Note:** Many of the values entered in this spreadsheet must be typed exactly as they will appear in AASHTOWare Project Civil Rights & Labor. Errors in spelling or capitalization may cause the spreadsheet to fail the conversion or import processes, or may trigger an exception or employee mismatch notification to the agency.

⚠️ **Note:** A copy of the VDOT Payroll Microsoft Excel spreadsheet may be obtained from VDOT’s website and should be used to create the contractor’s payroll spreadsheet template.

Viewing Contractor Information in a Payroll Spreadsheet Template

![Figure 23. VDOT Payroll Microsoft Excel Spreadsheet – Contractor Information](image)

Figure 23. VDOT Payroll Microsoft Excel Spreadsheet – Contractor Information
**Exercise 23**

In this exercise, you will view the Contractor section of a contractor’s payroll spreadsheet template, which is later used to create weekly payroll spreadsheets.

**Username:** N/A  
**Password:** N/A  
**Role:** N/A  
**Vendor:** Keith

1. Navigate to the location provided by the instructor.

2. Double-click the folder entitled **VDOT Training Payroll Files**.

3. Double-click the file **CONTRAINXX-Keith-Template.xlsx** (Note: XX is your user number).

4. In the **SUBCONTRACTOR** field, verify the entry X to indicate that this payroll is for a subcontractor.

5. In the **Name of Contractor** field, verify this payroll template is for **Keith Construction**.

6. In the **Contractor's ID** field, verify the entry **Z579**.

7. In the **CONTRACTOR ADDRESS - Addr 1** field, verify the entry **321 Valley Road**.

8. In the **City** field, verify the entry **Smithton**.

9. In the **State** field, verify the entry **VA**.

10. In the **Zip** field, verify the entry **77777**.

11. In the **Contract #** field, verify the entry **CONTRAINXX** (Note: XX is your user number).

12. In the (a) **WHERE FRINGE ARE PAID TO APPROVED PLANS** box, verify the entry **X**.
## Viewing Benefit Program Information in a Payroll Spreadsheet Template

### Exercise 24

In this exercise, you will view the Benefit Program Selection section of the contractor payroll spreadsheet.

<table>
<thead>
<tr>
<th>Role: N/A</th>
<th>Vendor: Keith</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username: N/A</td>
<td>Password: N/A</td>
</tr>
</tbody>
</table>

1. In the **Benefit Program Name** field, verify the entry Medical Insurance.
2. In the **Benefit Program Type** field, verify the selection Fringe Health/Welfare.
3. In the **Benefit Account Number** field, verify the entry 99369.
4. In the **Benefit Program Classification** field, verify the entry Healthcare.
5. In the **Contact Person** field, verify the entry Mindy Chavez.
6. In the **Contact Person's Phone** field, verify the entry 703-555-4386.

---

![Figure 24. VDOT Payroll Microsoft Excel Spreadsheet – Benefit Program Information](image-url)

*Figure 24*.
Viewing Employee Information in a Payroll Spreadsheet Template

As employee payroll information is included on payroll records that are approved by the agency, AASHTOWare Project Civil Rights & Labor adds those employees into the system as Reference Employees.

If employee information in a payroll that is signed and submitted to VDOT does not match the information in the reference employee record in AASHTOWare Project Civil Rights & Labor, it will trigger an exception or employee mismatch notification to VDOT. You may be required to review or correct the information.

⚠️ **Note:** When you record a new employee or change details for an existing employee, in the Individual Employee section of the payroll spreadsheet, in the Has Changed? Field, click the drop-down arrow and select True. This will alert the agency to the new or changed employee information.

⚠️ **Note:** If an employee is enrolled in an On-the-Job Trainee (OJT) program, you will indicate the percent of their hours to apply to the OJT program on a weekly contractor payroll spreadsheet in the OJT % field.

Figure 25. VDOT Payroll Microsoft Excel Spreadsheet – Employee Information
Exercise 25

In this exercise, you will view the Individual Employee section of the contractor payroll spreadsheet template.

Username: N/A  Password: N/A
Role: N/A  Vendor: Keith

1. In the Last Name field, verify the entry Keith.
2. In the First Name field, verify the entry Cody.
3. In the Vendor Emp ID field, verify the entry 1000.
4. In the Gender field, verify the selection Male.
5. In the Ethnicity field, verify the selection CAUC - CAUCASIAN.
6. In the Project # field, verify the entry PROJTRAINXX (Note: XX is your user number).
7. In the OT – RATE OF PAY field, verify the entry 29.25.
8. In the ST - RATE OF PAY field, verify the entry 19.50.
9. In the Craft Code field, verify the selection LABORERS.
10. In the Labor Code field, verify the selection CONCRETE FINISHER.
11. In the Fringe Benefits Rates fields, in the Health Welfare field, verify the entry 4.00.
12. Click the Exit button.
Creating a Weekly Payroll Spreadsheet from the Template

If you have created a payroll spreadsheet template for your company, you can copy that spreadsheet template each week to create your weekly payroll spreadsheet. On the copied payroll spreadsheet, record employee details for the week, including hours, payment and deduction amounts.

You will not complete these steps in training; this information is provided for future reference.

Exercise 26

This exercise describes how to copy a contractor payroll spreadsheet template to create a weekly payroll. You will not complete these steps in training; this information is provided for future reference.

1. Right-click the contractor payroll spreadsheet template and select Copy.
2. On a blank area of the Desktop, right-click and select Paste.
3. Right-click the file and select Rename.
4. Rename the file. One possible naming convention is **Contract ID – Contractor Name – YYMMDD**.
5. Double-click the file to open.
Exercise 27

In this exercise, you will view weekly employee payroll details in the Individual Employee section of the contractor weekly payroll spreadsheet.

Username: N/A
Password: N/A
Role: N/A
Vendor: Keith

1. Navigate to the location provided by the instructor.
2. Double-click the file CONTRAINXX-Keith-02142015.xlsx (Note: XX is your user number).
3. In the Payroll Number field, verify the entry 1.
4. In the Week ending field, verify the entry 02/14/2015.
5. In the Day field, verify the selection Sunday.
7. In the OT HOURS WORKED EACH DAY fields, verify the entry:
   OT Hours Worked - Day 7: 4.00
8. In the OT - Total Hours field, verify the entry 4.00.
9. In the ST HOURS WORKED EACH DAY fields, verify the entries:
   ST Hours Worked - Day 1: 0.00
   ST Hours Worked - Day 2: 8.00
   ST Hours Worked - Day 3: 8.00
   ST Hours Worked - Day 4: 8.00
   ST Hours Worked - Day 5: 8.00
   ST Hours Worked - Day 6: 8.00
   ST Hours Worked - Day 7: 0.00
10. In the ST - Total Hours field, verify the entry 40.00.
11. In the Project Gross field, verify the entry 897.00.
12. In the Gross Pay field, verify the entry 897.00.
13. In the FICA field, verify the entry 14.92.
15. In the **Total Deductions** field, verify the entry **109.11**.

16. In the **Net Wages** field, verify the entry **787.89**.

17. In the **Fringe Benefits Total** field, verify the entry **176.00**.

18. Click the **Exit** button.
Converting a Contractor Payroll Microsoft Excel Spreadsheet

After you have a correctly formatted payroll Excel spreadsheet with your data entered, you can create a payroll XML file online using the Cloverleaf converter tool.

⚠️ **Note:** Many of the values entered in the payroll spreadsheet must be typed exactly as they will appear in the system. Errors in spelling or capitalization may cause the spreadsheet to fail the conversion or import processes.

⚠️ **Note:** The Cloverleaf converter tool may be accessed through the Cloverleaf website at https://xml.cloverleaf.net/spreadsheet.

**Exercise 28**

In this exercise, you will convert a weekly payroll spreadsheet into an XML file.

Username: N/A  Password: N/A
Role: N/A  Vendor: Keith

1. Open Internet Explorer and navigate to the following URL: https://xml.cloverleaf.net/spreadsheet/

2. On the Cloverleaf website, under the **Converter** section, click the **Browse** or **Choose File** button.

   *Note that the button name is determined by your choice of browser.*

3. Locate and select the file CONTRAINXX-Keith-02142015.xlsx (Note: XX is your user number) saved to the **Desktop**.

4. Click the **Open** button.

5. Click the **I agree to the Terms of Use** check box.

6. Click the **Convert** button.

7. Save the payroll XML file to the **Desktop** with the name CONTRAINXX-Keith-02142015-XML (Note: XX is your user number).
Importing a Payroll

Once you have created the payroll XML file, you must import the file into AASHTOWare Project Civil Rights & Labor to create the payroll record. If it matches the VDOT XML payroll schema, this file can be generated from either the conversion process previously described or directly from your payroll system.

⚠️ **Note:** Many of the values entered in the import file must be typed exactly as they will appear in the system. Errors in spelling or capitalization may cause the import file to fail the import process.

⚠️ **Note:** You can import multiple payroll files simultaneously.

---

**Figure 26. Import a Payroll**

- **Import**
  - **Payroll Import**
    - **Select File:** CONTRA/N01-G378-214-2015-XML.xml 5681 bytes
Exercise 29

In this exercise, you will import a new payroll.

Username: **CRL.SUBXX**  
Password: **Virginia!**  
Role: **EXTSUBPAYROLL**  
Vendor: **Keith**

1. In Internet Explorer, navigate to the AASHTOWare Project Civil Rights & Labor web address supplied by your instructor.
2. In the **Username** field, type **CRL.SUBXX** (Note: XX is your user number).
3. In the **Password** field, type **Virginia!**.
4. In the **Domain** field, click the drop-down arrow and select **AUTH Users**.
5. Click the **Log On** button.
6. Click the **Home** drop-down arrow. If not already selected, click the **EXTSUBPAYROLL** role.
7. Click the system **Actions** button and select **Import File**.
8. Click the **Select File** button.
9. In the **Choose File to Upload** window, navigate to the **Desktop** and click file **CONTRAINXX-Keith-02142015-XML** (Note: XX is your user number).
10. Click the **Open** button.
11. Click the **Import** button.

*Wait for the Payroll import successfully submitted message to display.*
Viewing Process History

The Process History Overview component allows you to check on the status of all processes you are running at any time, such as importing payroll files.

For more information, see the Viewing Process History section in the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

Figure 27. Process History Overview
Exercise 30

In this exercise, you will view the Process History Overview component.

Username: CRL.SUBXX  Password: Virginia!
Role: EXTSUBPAYROLL  Vendor: Keith

1. Click the Process History link.

2. In the Output Files field, click the link for the Error.log file and the ImportPayrollFile.LOG file to access messages about the import process.

3. Follow your browser’s instructions to save or open the files.

4. View the output log files.

Note that if an error is listed, the file import will be unsuccessful. If an error occurs, you must make corrections to the file and attempt to import the revised file.
**Working with Attachments**

Attachments provide an easy way to integrate outside information of various kinds into your contract. Examples of the types of files you might attach include Microsoft Word documents, Excel spreadsheets, PDFs, URLs, digital photographs and other types of graphic files.

Attachments are accessed on any component by clicking the Actions button on a row or component header.

The Attachments Overview component contains a list of rows for all the files that have been attached to the entity by you or another user with your active role.

For more information, see the *Working with Attachments* section in the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

⚠️ **Note**: You should add any necessary attachments to a payroll prior to signing the payroll.
Signing Contract Vendor Payrolls

The Sign Payroll component provides a guided process by which an authorized user can review, verify, and sign a contract vendor payroll.

⚠️ **Note:** After you sign a payroll and it is progressed to VDOT for review, it can no longer be changed or deleted. Any further changes must be recorded by creating a payroll modification record.

After you sign a payroll, the system performs the following actions:

- The system verifies that you are authorized to sign the payroll, sets the **Signed By** field with your User ID, and sets the **Signed Date** field with the current date.
- The system progresses the payroll to the next step in the process and then sets the payroll record to read-only to prevent any future changes.
- The Payroll Summary and Payroll Verification Text reports that are reviewed during the guided Sign Payroll process are attached to the payroll record for historical purposes.

For more information, see the Signing Contract Vendor Payrolls section of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*
In this exercise, you will sign a vendor payroll.

Username: CRL.SUBXX Password: Virginia!
Role: EXTSUBPAYROLL Vendor: Keith

1. Click the Home button.

2. Under the Vendor Payrolls component, in the Quick Find search box, type TRAINXX (Note: XX is your user number).

3. For contract CONTRAINXX and vendor Z579 Keith Construction click the Payrolls: link 1. (Note: XX is your user number).
Note that this link will be updated by the system to match the number of payrolls for this vendor and contract.

4. From the **Contract Certified Payroll Overview** component, click payroll ID 1.

5. Click the **Employee** quick link.

   *Review the employee information.*

6. Click the **Status** quick link.

   *Review the status information.*

7. Scroll down to view the **Transitions, Exceptions, and Employee Mismatches** sections.

   *These sections will be blank at this point in the workflow.*

8. Click the Contract component **Actions** button and select the **Sign Payroll** action.


   *If necessary, refresh the page by pressing the F5 key on your keyboard.*

10. Click the **Next** button.

11. Review the **Verification Requirement** text.

12. Click the **Next** button.

13. In the **Comments** field, type **Ready for prime review – SUBXX** (Note: XX is your user number).

14. Click the **Sign Payroll** button.

   *Wait for the **Signature Process is Completed** message to display.*

15. Click the **Log off** button.
Performing a Prime Payroll Review

The prime contractor on a contract must review and progress all payrolls submitted and signed by subcontractors and other payroll vendors for the contract before the payroll can be processed by the agency. The system provides a guided process that the prime contractor can use to review a contract vendor payroll. The prime contractor on a contract must also review and progress all payrolls he submits on behalf of his subcontractors before the payroll can be processed by the agency.

⚠️ Note: To perform a prime review, the current user must have vendor authority for the prime contractor.

For more information, see the Performing a Prime Payroll Review section of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

![Figure 29. Prime Review and Progress Payroll](image-url)
Exercise 32

In this exercise, you will perform a Prime Review on a subcontractor payroll.

Username: CRL.PRIMEXX       Password: Virginia!
Role: EXTPRIMEPAYROLL       Vendor: Smithton

1. In the Username field, type CRL.PRIMEXX (Note: XX is your user number).
2. In the Password field, type Virginia!.
3. In the Domain field, click the drop-down arrow and select AUTH Users.
4. Click the Log On button.
5. Click the Home drop-down arrow. If not already selected, click the EXTPRIMEPAYROLL role.
6. Under the Unapproved Payrolls component, in the Quick Find search box, type TRAINXX (Note: XX is your user number).
7. For contract CONTRAINXX and vendor Z579 Keith Construction (Phase = Under Prime Review), click the link for CONTRAINXX. (Note: XX is your user number).
8. Scroll down to view the Transitions section

   Note that the Exceptions and Employee Mismatches sections will be blank at this point in the workflow.

9. Click the Contract component Actions button and select Prime Review.
11. Click the Next button.
12. In the Comments field, type Ready for agency review – PRIMEXX (Note: XX is your user number).
13. Click the Forward to Agency button.

   Wait for the Certified Payroll Progression is Successful message to display.
14. Click the Log off button.
Reviewing a Rejected Payroll

Payroll information is initially entered by prime contractors and subcontractors and submitted to VDOT. The agency reviews the information contained in a payroll, and can approve or reject the payroll.

If employee information in a payroll that is signed and submitted to VDOT does not match the information in the reference employee record in AASHTOWare Project Civil Rights & Labor, it will trigger an exception or employee mismatch notification to VDOT. The agency may reject such a payroll, and you may be required to review or correct the information. The contractor should review rejected payrolls to identify the changes needed.

Monitoring Payroll Status

The Status component allows you to maintain all the information related to the status of the payroll. For non-agency users, the Status component displays the exceptions and employee mismatches that the agency has flagged for vendor review.

For more information, see the Maintaining Payroll Status section of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

![Figure 30. External Certified Payroll Status](image)
Exercise 33

In this exercise, you will access the Status component of a payroll that has been rejected by the agency.

Username: **CRL.SUBXX**  
Password: **Virginia!**  
Role: **EXTSUBPAYROLL**  
Vendor: **Quarterstone**

1. In the **Username** field, type **CRL.SUBXX** (Note: XX is your user number).
2. In the **Password** field, type **Virginia!**.
3. In the **Domain** field, click the drop-down arrow and select **AUTH Users**.
4. Click the **Log On** button.
5. Click the **Home** drop-down arrow. If not already selected, click the **EXTSUBPAYROLL** role.
6. From the homepage, under the **Vendor Payrolls** component, in the **Quick Find** search box, type **TRAINXX** (Note: XX is your user number).
7. For contract **CONTRAINXX** and vendor **z544 Quarterstone Industries, Inc**, click the **Payrolls**: link 1. (Note: XX is your user number).

   *Note that this link will be updated by the system to match the number of payrolls for this vendor and contract.*

8. Click the link for payroll 3.
9. Click the **Status** quick link and review information in the **Phase** section.
Reviewing Transitions

Certified payrolls pass through several transition points as they are checked and accepted, or rejected, at different phases before eventually being approved by the transportation agency.

The Transitions section of the payroll Status component shows the date of the transition, the phase, whether the payroll was accepted or rejected, Approve or Reject buttons (as appropriate for the current phase), and a list of all the transition comments that were recorded for the payroll.

For more information, see the Transitions section of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

Figure 31. External Certified Payroll – Transitions

Exercise 34

In this exercise, you will review a payroll that has been rejected by the agency and view transition information.

Username: CRL.SUBXX
Password: Virginia!
Role: EXTSUBPAYROLL
Vendor: Quarterstone

1. Scroll down to the Transitions section.
2. Review the information provided, including any recorded transition comments.
**Reviewing Exceptions**

The first time a certified payroll is put in *Under Agency Review* status, the system runs a series of validation checks to verify that the data in the payroll is valid. If one of these validations is not met, the system generates a payroll exception. The Exceptions section of the Payroll Status component contains a list of exceptions that the system has generated for the payroll and which the agency has marked for vendor review and action.

Exceptions can include things such as payroll numbers out of sequence, payroll dates and the payroll start day of the week not matching, missing or incorrect wage rates, missing or incorrect work hours and calculations, missing or incorrect payment or deduction information, contractor or employee information that does not match the data in the application, and more.

If employee information in a payroll that is imported from a payroll spreadsheet, signed, and submitted to the agency does not match the information in the reference employee record in the system, it will trigger an exception or employee mismatch notification to VDOT. You may be required to review or correct the information.

For more information, see the Exceptions section of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

⚠️ **Note:** When the system calculates the values used to validate payroll data, the calculated values must be truncated or rounded to a whole penny. Calculated values for payment fields are rounded up to the next penny. Calculated values for deductions are truncated to two decimal places.

![Figure 32. External Certified Payroll – Exceptions and Employee Mismatches](image-url)
Exercise 35

In this exercise, you will review a payroll that has been rejected by the agency and view the payroll exceptions.

Username: **CRL.SUBXX**  
Password: **Virginia!**  
Role: **EXTSUBPAYROLL**  
Vendor: **Quarterstone**

1. Scroll down to the **Exceptions** section.
2. Expand the **Employee** Exceptions row and review the agency comments.
   
   *Note that Jane Lozara’s name was incorrectly recorded in the payroll spreadsheet as Janet Lozara.*

3. Expand the **Labor** Exceptions row and review the agency comments.
   
   *Note that the deductions were recorded incorrectly for Jane Lozara; only the Total Deductions value was submitted, and the deductions detail is also required.*
**Reviewing Employee Mismatches**

If a payroll exception is due to a mismatch between a payroll employee record and its corresponding reference employee record, the Employee Mismatches section of the Payroll Status component will contain the mismatch information that the system has generated for the payroll and which the agency has marked for vendor review and action.

Employee Mismatches include employee information that does not match the reference employee data in the application, such as misspelled names, incorrect vendor supplied identification information, incorrect gender or ethnicity, and other incorrect employee information.

For more information, see the Exceptions section of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

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**Exercise 36**

In this exercise, you will view the employee mismatch information.

Username: **CRL.SUBXX**  
Password: **Virginia!**  
Role: **EXTSUBPAYROLL**  
Vendor: **Quarterstone**

1. Scroll down to the Employee Mismatches section.

2. Review the employee mismatch information shown.

   *Note that in our training exercise, this information confirms there is an employee mismatch, but the detail is shown in the Exceptions section.*
Creating a Payroll Modification

Once a payroll has been signed by the contractor, it cannot be edited. If a payroll needs to be revised after it has been signed, you can only make the changes by creating a payroll modification. A payroll modification is a copy of the payroll record, identical to the original, except that it does not include attachments or comments. You can then record changes to the payroll in the modification record.

Once the payroll modification record has been completed, it must be signed and progressed through the payroll workflow.

⚠️ **Note:** When you add a payroll modification, all the information associated with any previous modifications (including payroll exceptions) becomes read-only and cannot be changed.

⚠️ **Note:** The original payroll record can be modified until the payroll reaches the Under Agency Review phase. Once the payroll reaches the Under Agency Review phase, all payroll changes will need to be made with a new payroll modification.

⚠️ **Note:** You can create a payroll modification within AASHTOWare Project as shown in this guide. In addition, you can create a payroll modification by modifying your payroll spreadsheet and importing the updated XML file. This will create a payroll modification.

For more information, see the *Creating a Payroll Modification* section of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.*
In this exercise, you will create and sign a payroll modification.

Username: CRL.SUBXX  
Password: Virginia!  
Role: EXTSUBPAYROLL  
Vendor: Quarterstone

1. Click the Contract component Actions button and select the Create Modification task.
2. The system displays the new payroll modification record (with the same payroll ID) with the Modification Number field set to 1 and the Phase set to Initial.
3. In the Employees component, locate Employee Janet Lozara. Click the Employee Information link.
4. In the First Name field, change Janet to Jane.
5. Click the Save button.
6. Scroll to the Wages section.
7. In the **FICA Withholding Amount** field, type **6.98**

8. In the **Federal Withholding Amount** field, type **34.11**

9. Click the **Back to Top** button.

10. Click the Employees **Save** button.

11. Click the Contract component **Actions** button and select the **Sign Payroll** action.

12. Review the **Payroll Summary Report** information.

13. Click the **Next** button.

14. Review the **Verification Requirement** text.

15. Click the **Next** button.

16. In the **Comments** field, type **Modification ready for prime review – SUBXX** (Note: **XX** is your user number).

17. Click the **Sign Payroll** button.
Payroll Summary Report

The Payroll Summary Report lists all the details of a certified payroll, including labor information, craft and classification codes, and a description of any attachments to the payroll. This is a two-part report that includes a Summary Page for the entire payroll and a summary page for each employee included in the payroll. You can generate the report for one or more payrolls at a time.

Figure 34. Payroll Summary Report
Exercise 38

In this exercise, you will generate a Payroll Summary Report.

Username: CRL.SUBXX  Password: Virginia!
Role: EXTSUBPAYROLL  Vendor: Quarterstone

1. Click the Contract component Actions button and select the Payroll Summary report.
2. Click the Execute button.
3. Review the report.
5. Click the Home button.
Deleting a Payroll

You can only delete certified payrolls that have not been progressed beyond the Initial status.

⚠️ **Note**: Deleting a payroll record will automatically delete all attachments linked to that payroll.

You will not delete a payroll in training. The steps to delete a payroll are listed below:

1. Navigate to the **Contract Certified Payroll Overview** component.

   *Note that these steps are informational; you will not delete a payroll in training.*

2. For the payroll, click the row **Actions** button.

3. Click the **Delete** action.

4. Click the **Save** button.
Alternate Methods of Payroll Entry

Adding a Contract Payroll in AASHTOWare Project

When required by VDOT, payrolls associated with the work performed must be recorded, reviewed, and approved by VDOT. The approval process ensures that the calculations in the payroll are correct and that federal guidelines for wages and fringe benefits have been followed.

In AASHTOWare Project Civil Rights & Labor™, payroll records can be manually entered and imported payroll records can be manually updated. For more information, see the section Adding a Contract Payroll of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

Required fields are:

- Payroll Number
- Begin Date
- End Date
- Fringe Benefit Payment Type

Figure 35. External Add Certified Payroll Component
Exercise 39

In this exercise, you will manually create a new payroll in AASHTOWare Project Civil Rights & Labor.

Username: CRL.SUBXX
Password: Virginia!
Role: EXTSUBPAYROLL
Vendor: Slate

1. Under the Vendor Payrolls component, in the Quick Find search box, begin to type TRAINXX (Note: XX is your user number).

2. For contract CONTRAINXX and vendor z530 - Slate Rock and Gravel Company, click the row Actions menu and select Add.

3. In the Payroll Number field, type 2.

4. In the Begin Date field, type 2/8/2015

5. In the End Date field, type 2/14/2015.

6. In the Fringe Benefit Payment Type field, click the drop-down arrow and select Plan Funds.

7. Click the Save button.
Adding Benefit Programs to the Payroll

Payroll benefit programs provide a variety of fringe benefits to employees, for example, medical insurance, retirement or pension funds, vacation time and apprenticeship funding.

**Note:** Benefit Programs can only be added to a payroll if the Fringe Benefit Payment Type for the payroll is set to either Plan Funds or Plan Funds with Exceptions.

Required fields are:
- Benefit Program Name
- Benefit Account Number
- Trustee/Contact Person
- Trustee/Contact Phone
- Benefit Program Type

For more information, see the *Adding Benefit Programs to the Payroll* section of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

![Figure 36. Benefit Programs Subheader](image-url)
Exercise 40

In this exercise, you will add a benefit program to a payroll.

Username: CRL.SUBXX        Password: Virginia!
Role: EXTSUBPAYROLL        Vendor: Slate

1. Under the Benefit Programs section, in the Benefit Program Name field, type Family Plan.
2. In the Benefit Account Number field, type 12345.
3. In the Trustee/Contact Person field, Susan Slate.
4. In the Trustee/Contact Phone field, type 555-555-1234.
5. In the Benefit Program Type field, click the drop-down arrow and select Fringe Health/Welfare.
6. In the Benefit Program Classification field, type Health insurance.
7. Click the Save button.
8. If you needed to record additional benefit programs, in the Benefit Programs section, you would click the New button.
**Maintaining Payroll Employees**

A *payroll employee* is an employee being paid on the selected payroll. Initially, a payroll employee might not be recorded in the system as a reference employee, but he or she will be added to the Reference Employee List during the payroll validation process.

For more information, see the *Maintaining Payroll Employees* section of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

**Adding Employees to the Payroll**

The process for adding an employee to the payroll depends on whether the employee is already recorded in the system reference data.

**Adding a Reference Employee to the Payroll**

See the section *Adding Employees to the Payroll* of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users* for more information about adding a reference employee to the payroll.

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**Figure 37. Employees Component Actions Menu – Add Ref Employees**
Exercise 41

In this exercise, you will add a reference employee to the payroll.

Username: CRL.SUBXX  
Password: Virginia!
Role: EXTSUBPAYROLL   
Vendor: Slate

1. Click the Employee quick link.
2. On the Employees component, click the component Actions button.
3. Click the Add Ref Employees action.
4. In the Quick Find search box, type the name of the reference employee you want to add to the payroll.
5. In the list of employees returned from the search, click Fred Jones.
6. Click the Add to Employees button.
7. View the information displayed on the Employee component.
Adding a Non-Reference Employee to the Payroll

As employee payroll information is included on payroll records that are approved by VDOT, the system adds those employees into the system as Reference Employees.

See the section Adding Employees to the Payroll of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users for more information about adding a non-reference employee to the payroll.

Required fields are:

- First Name
- Last Name
- Payment Type
- Gender
- Ethnic Group
- Vendor Supplied Employee ID

Figure 38. Payroll Employee Modal Window
Exercise 42

In this exercise, you will add a new non-reference employee to the payroll.

Username:  CRL.SUBXX  Password:  Virginia!
Role:  EXTSUBPAYROLL  Vendor:  Slate

1. On the Employees component, click the component Actions button.
2. Click the Add Employee action.
3. In the First Name field, type Emma.
4. In the Last Name field, type Smith.
5. In the Payment Type field, confirm Hourly is selected.
6. In the Gender field, click the drop-down arrow and select Female.
7. In the Ethnic Group field, click the drop-down arrow and select BLK - BLACK AMERICAN.
8. In the Vendor Supplied Employee ID field, type 63XX (Note: XX is your user number).
9. Click the Save button.
**Adding Classifications**

See the section *Adding Classifications* of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users for more information about adding classification information for a payroll employee.

![Figure 39. Payroll Employee Classification Section](image)

**Exercise 43**

In this exercise, you will add employee classifications to the payroll employee.

Username: **CRL.SUBXX**  
Password: **Virginia!**  
Role: **EXTSUBPAYROLL**  
Vendor: **Slate**

1. From the External Payroll Employees component, scroll down to the Employees component.
2. In the Employees section, in the Employees drop-down menu, confirm Emma Smith is selected.
3. Scroll down to the Classification section.
4. In the Contract Project ID field, confirm PROJTRAINXX is selected. (Note: XX is your user number).
5. In the Labor Classification field, search for and select **0400 CONCRETE FINISHER**.
6. In the **Craft Code** field, click the drop-down arrow and select **30 - SPLTY CRAFT-CEMENT MASON (FINISHERS)**.

7. In the **Straight Hourly Rate** field, type **19.42**.

8. In the **Overtime Hourly Rate** field, type **29.13**.

9. Emma Smith is not enrolled in an OJT program. But if she was enrolled in an OJT program for this Labor Classification and Craft Code, you would select the **OJT Program Indicator** check box and in the **OJT Wage Percentage** field enter the value.

10. In the **Fringe Health/Welfare Rate** field, type **4.00**.

   Note where additional fringe rates would be recorded for any other benefit programs indicated on this payroll. On this payroll, only one benefit program was recorded.

11. To collapse the Classification section, click the Classification **Expand/Collapse** button.
Adding Hours

See the section *Adding Hours* of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users* for more information about adding labor hours worked on the project for a payroll employee.

⚠️ *Note*: Do not add non-project specific hours worked by the employee on the payroll record.

---

Exercise 44

In this exercise, you will add labor hours to the payroll employee:

Username: CRL.SUBXX
Password: Virginia!
Role: EXTSUBPAYROLL
Vendor: Slate

1. Scroll down to the **Hours** section.

2. In the **Straight Time Hours** fields and the **Overtime Hours** fields, enter the following values:
   - ST Hours Worked - **Day 1**: 0.00
   - OT Hours Worked - **Day 1**: 0.00
   - ST Hours Worked - **Day 2**: 8.00
   - OT Hours Worked - **Day 2**: 0.00
<table>
<thead>
<tr>
<th></th>
<th>Day 3</th>
<th>Day 4</th>
<th>Day 5</th>
<th>Day 6</th>
<th>Day 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>ST Hours Worked</td>
<td>8.00</td>
<td>8.00</td>
<td>8.00</td>
<td>8.00</td>
<td>0.00</td>
</tr>
<tr>
<td>OT Hours Worked</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

3. In the **Total Straight Time Hours** field, type **40.00**.

4. In the **Total Overtime Hours** field, type **0**.

5. To collapse the Hours section, click the Hours **Expand/Collapse** button.
Adding Wages

See the section Adding Wages of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users for more information about adding wages earned on the project for a payroll employee.

![Figure 41. Payroll Employee Wages Section](image)

**Exercise 45**

In this exercise, you will add wages to the payroll employee.

Username: **CRL.SUBLXX**  
Password: **Virginia!**  
Role: **EXTSUBPAYROLL**  
Vendor: **Slate**

1. Scroll down to the **Wages** section.
2. In the **Federal Gross Pay** field, type **776.80**.
3. In the **Total Gross Pay** field, type **776.80**.
4. In the **Net Pay** field, type **695.22**.
5. In the **Total Hours** field, type **40**.
6. In the **Total Deductions** field, type **81.58**.
7. In the **FICA Withholding Amount** field, type **9.37**.
8. In the **Federal Withholding Amount** field, type **72.21**.
9. In the **Total Fringe Benefits Paid** field, type **160.00**.
10. Click the **Back to Top** button.
11. Click the **Save** button.
**Adding Deductions**

Records for standard payroll deductions such as federal income tax and FICA are maintained as part of the Payroll Employee record. Other deductions refer to additional, irregular deductions an employee may choose to make (for example, money withheld for the employee’s 401(k) plan or to pay union dues).

For more information, see the *Adding Deductions* section of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

![Figure 42. Payroll Employee Deductions Section](image)

**Exercise 46**

In this exercise, you will view where deductions can be added for the payroll employee:

Username: **CRL.SUBXX**  
Password: **Virginia!**  
Role: **EXTSUBPAYROLL**  
Vendor: **Slate**

1. Scroll down to the Deductions section.

2. Click the New button.

   *You would click the New button as many times as needed to record all deductions.*

3. In the Description field, you would type a brief description for the deduction.

   *For training, leave this field blank.*

4. In the Amount field, you would type the amount to be withheld for the deduction from the employee’s payroll.

   *For training, leave this field blank.*
5. Above, in the Wages section **Total Deductions** field, you would include the new deduction in the calculated total of all deductions recorded.

   *For training, do not update this field.*

6. You would then click the **Save** button.
Adding Additional Classifications

![Add New Project/Classification to Employee Modal Window](image)

Figure 43. Add New Project/Classification to Employee Modal Window

Exercise 47

In this exercise, you will learn how to add additional projects and classifications to the payroll employee.

Username: **CRL.SUBXX**
Password: **Virginia!**
Role: **EXTSUBPAYROLL**
Vendor: **Slate**

1. Click the Employees component **Actions** button and select **Add New Project/Classification to Employee**.
2. Select the row for **Emma Smith**.
3. In the **Contract Project ID** field, confirm **PROJTRAINXX** is selected. (Note: XX is your user number).
4. In the **Labor Classification** field, select **3400 CONCRETE FINISH MACHINE OPERATOR**.
5. In the **Craft Code** field, click the drop-down arrow and select **15 – POWER EQUIPMENT OPERATORS**.

6. Click the **Add Classification/Project to Employee** button.

7. In the **Employees** section, click the **Employees** drop-down menu and confirm **Emma Smith** is listed twice, once for each classification.

8. Click the **Log Off** button.

**Next Steps**

In these training examples, the next step would be to complete the payroll information for the recorded employees. As shown earlier in this chapter, after the payroll record is complete, you would sign the payroll to progress it in the workflow.
Prime Contractors and Proxy Payrolls for a Subcontractor

Adding a Proxy Payroll for a Subcontractor

A prime contractor can enter a new payroll record on behalf of one of his subcontractors. The prime contractor can either enter the payroll record manually or import the payroll record in XML file format.

On the Contract Certified Payroll Overview page, existing payroll records are grouped on two tabs.

- The **Vendor Payrolls** tab lists contract vendors' own payrolls.
- The **Proxy Payrolls** tab lists payrolls that have been submitted by the prime contractor on behalf of subcontractors.

⚠️ **Note:** Subcontractors can view the Proxy Payroll tab, but will not be able to add or change information.

For more information, see the *Adding a Payroll for a Subcontractor* section of the AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users.

![Figure 44. External Add Certified Payroll for Subcontractor](image)
Exercise 48

In this exercise, you will manually create a new payroll for a subcontractor, as the prime contractor.

Username: CRL.PRIMEXX
Password: Virginia!
Role: EXTPRIMEPAYROLL
Vendor: Smithton

1. In Internet Explorer, navigate to the AASHTOWare Project Civil Rights & Labor web address supplied by your instructor.

2. In the Username field, type CRL.PRIMEXX (Note: XX is your user number).

3. In the Password field, type Virginia!.

4. In the Domain field, click the drop-down arrow and select AUTH Users.

5. Click the Log On button.

6. Click the Home drop-down arrow. If not already selected, click the EXTPRIMEPAYROLL role.

7. Under the Vendor Payrolls component, in the Quick Find search box, begin to type CONTRAINXX (Note: XX is your user number).

8. For contract CONTRAINXX and vendor Z530 - Slate Rock and Gravel Company, click the row Actions menu and select Add for Subcontractor.

9. In the Payroll Number field, type 3.

10. In the Begin Date field, type 2/15/15

11. In the End Date field, type 2/21/15.

12. In the Fringe Benefit Payment Type field, click the drop-down arrow and select Cash.

13. Click the Save button.


**Submitting a Proxy Payroll for a Subcontractor**

The Submit for Contractor component provides a guided process by which an authorized prime contractor can review, verify, and submit a contract vendor payroll on behalf of one of his subcontractors.

⚠️ **Note:** After you submit a subcontractor's payroll, it can no longer be changed or deleted. Any further changes must be recorded by creating a payroll modification record.

After you submit a payroll for a subcontractor, the system performs the following actions:

- The system verifies that you are authorized to submit the payroll.
- The system progresses the payroll to the next step in the process and then sets the payroll record to read-only to prevent any future changes.
- The Payroll Summary and Proxy Verification Text reports that are reviewed during the guided Sign Payroll process are attached to the payroll record for historical purposes.

For more information, see the *Submitting Contract Vendor Payrolls for Subcontractors* section of the *AASHTOWare Project Civil Rights & Labor™ User’s Guide for Non-Agency Users*.

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![Figure 45. Submit for Subcontractor](image-url)
**Exercise 49**

In this exercise, you will submit a payroll for a subcontractor, as the prime contractor.

- **Username:** CRL.PRIMEXX       **Password:** Virginia!
- **Role:** EXTPRIMEPAYROLL       **Vendor:** Smithton

1. On the **Contract** component, click the component **Actions** button.
2. Click the **Submit for Subcontractor** action.
   
   *Note that this payroll does not have any employee information and is being submitted for training purposes.*
3. Review the Payroll Summary Report and click the **Next** button at the bottom of the component.
4. Review the verification requirement and click the **Next** button at the bottom of the component.
5. In the **Submission Method** field, click the drop-down arrow and select **Delivered**.
   
   *Note that an attachment could be added to this electronic payroll submittal; in that case Attached should be selected.*
6. In the Subcontractor's **Payroll Signer** field, type **Michael Jones**.
7. In the **Proxy Signed Date** field, enter **2/25/15**.
8. In the **Comments** field, type **Delivered payrolls to project engineer - PRIMEXX**.
   (Note: XX is your user number.)
9. Click the **Submit Payroll** button.

*The system verifies that you are authorized to submit the payroll and then sets the payroll record to read-only to prevent any future changes. The system attaches the Payroll Summary report and the Proxy Verification report to the payroll record.*