



NDOR SiteManager Materials Management

Laboratory and Field Personnel
Instructions

Generate an RTF (Report Template
Facility) Report

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Updated Roles & Responsibilities	5/23/2012	Andi Clark
Removed SCL procedures; See Generate a Sampling Checklist	1/30/2013	Andi Clark

1. Purpose:

This document is intended to be used in conjunction with the existing training materials provided by the NDOR (Nebraska Department of Roads), M&R (Materials & Research) Division. Questions concerning initialization of the SMGR (SiteManager) application are addressed in this existing training material.

The purpose of this instructional document is to define and provide the steps necessary to successfully generate a regular or scheduled RTF (Report Template Facility) report in SMGR.

1.1 Roles and Responsibilities:

SiteManager Staff: 402.479.4760, DOR.SiteManagerMaterials@nebraska.gov

1.2 Authentication:

Generate a Sampling Checklist: http://www.nebraskatransportation.org/mat-n-tests/pdfs-docs/Materials_Management_Guidance/Reporting/Generate-a-Sampling-Checklist2112013.pdf

1.3 Abbreviations:

ID: Identification Number
M&R: NDOR Materials & Research
NDOR: Nebraska Department of Roads
RTF: Report Template Facility
SCL: Sampling Checklist
SMGR: SiteManager

2. Operational Instructions:

These instructions will provide the steps necessary to generate an RTF report in SMGR.

2.1 Main Panel:

After successfully completing the log in process, SMGR will present the Main Panel. From the Main Panel, select Materials Management(+).

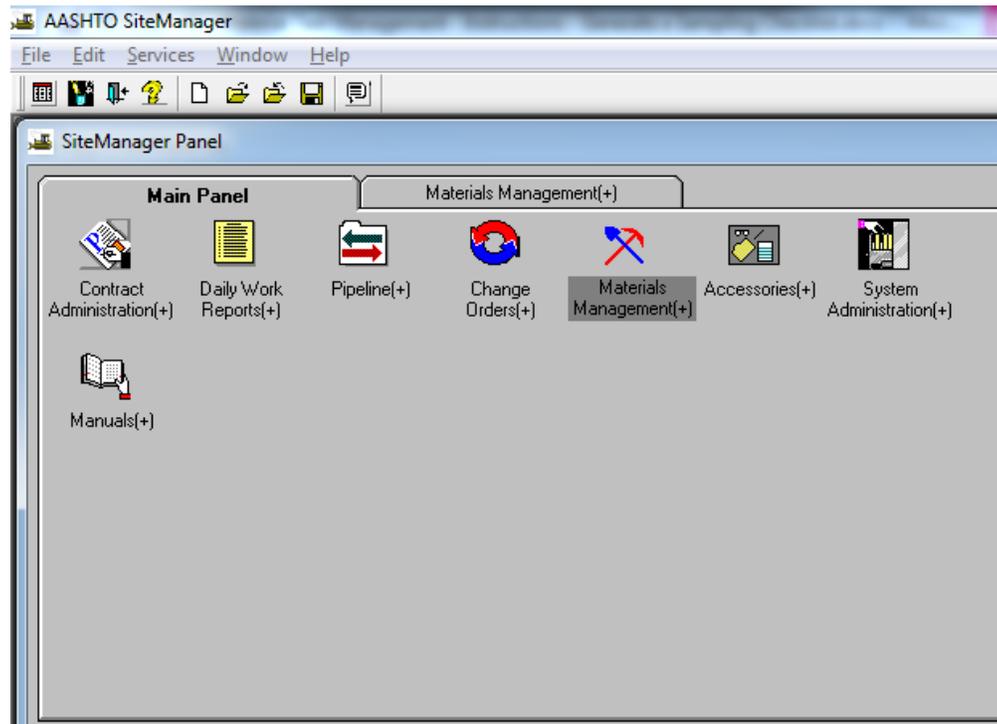


Figure 1, SMGR Main Panel

NOTE: The icons represented in these illustrations may differ based on the user's security group.

2.2 Materials Management:

Once selected, an array of Material Management(+) icons will be presented on the Materials Management(+) tab. From the Material Management(+) tab, select Process List.

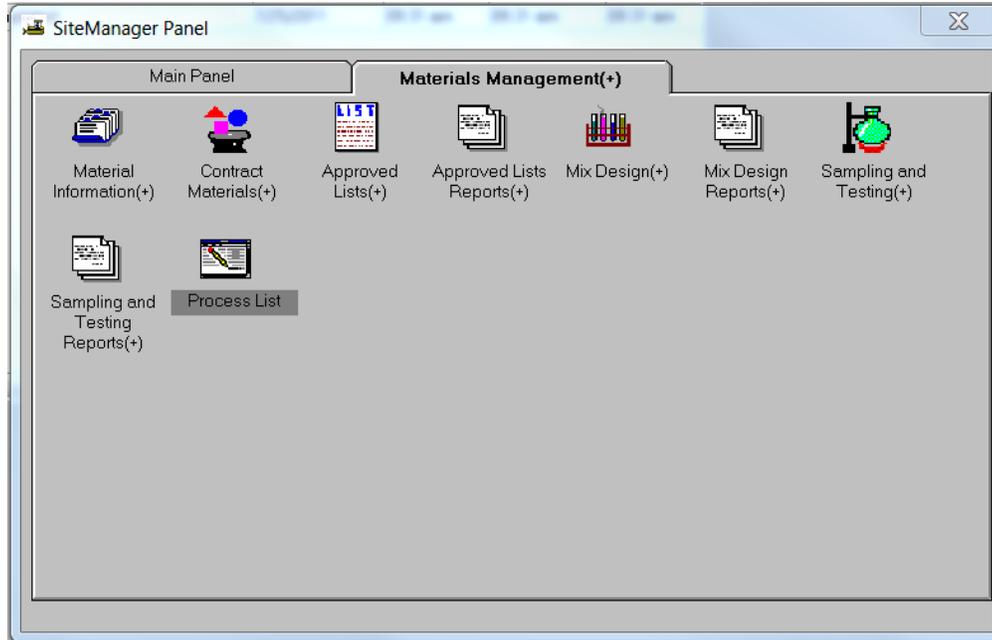


Figure 2, Materials Management (+)

2.3 Sampling Checklist:

The Sampling Checklist is unique in its generation and the necessary steps to produce the checklist are provided in [Generate a Sampling Checklist](#).

For all reporting activities other than the SCL, follow the steps provided in the subsequent sections.

2.4 Generate a Report:

Follow these steps to generate a SMGR report:

2.4.1 Process List:

Process List will present all of the reports available within SMGR. From the Process List, double click the report or select, then click the Run Process icon, , to generate the desired report. This action will display the Confirm Process Submission window.

NOTE: The reports can be sorted by clicking the Process ID, Process Type, or Process Description column headers.

Process ID	Process Type	Process Description
AGF00021	Custom	Agg: Contract Summary-Field Grad-C33 Fine Sand
AGF00022	Custom	Agg: P/S Summary-Field Gradations-C33 Fine Sand
AGF00023	Custom	Agg: Contract Summary-Field Grad-Class C (BX)
AGF00024	Custom	Agg: Contract Summary-Field Grad-Chip Seal Aggregate
AGF00025	Custom	Agg: P/S Summary-Field Gradations-Chip Seal Aggregate
AGF00026	Custom	Agg: P/S Summary-Field Gradations-Gravel for Surfacing
AGF00027	Custom	Agg: Contract Summary-Field Grad-Gravel for Surfacing
AGF00028	Custom	Agg: P/S Summary-Field Gradations-Coarse Agg Pre-cast/stress
AGF00029	Custom	Agg: Contract Summary-Field Grad-Coarse Agg Pre-cast/stress
AGF00030	Custom	Agg: P/S Summary-Field Gradations-Gravel for Surfacing, X
AGF00031	Custom	Agg: Contract Summary-Field Grad-Gravel for Surfacing, X
AGF00032	Custom	Agg: P/S Summary-Field Gradations-Fine Agg Pre-cast/stress
AGF00033	Custom	Agg: Contract Summary-Field Grad-Fine Agg Pre-cast/stress
AGF00034	Custom	Agg: Contract Summary-Field Grad-Granular Backfill
AGF00035	Custom	Agg: P/S Summary-Field Gradations-Granular Backfill
AGL00001	Custom	Agg: Contract Summary-Central Lab-Mineral Agg/Armor Coat
AGL00002	Custom	Agg: P/S Summary-Central Lab-Mineral Agg/Armor Coat
AGL00003	Custom	Agg: Contract Summary-Central Lab-Class A (Silica Fume Fine)
AGL00004	Custom	Agg: P/S Summary-Central Lab-Class A (Silica Fume Fine)

Figure 3, Process List

2.4.2 Confirm Process Submission:

Confirm Process Submission provides for two different delivery methods for reporting. Reports may be delivered to a selected email address or generated immediately at the desktop.

The dialog box titled "Confirm Process Submission" is shown over the Process List window. It contains a text input field labeled "Enter Contract:" with a "String" label to its right. Below the input field are four buttons: "Submit", "Parameters", "Subset", and "Cancel". The "Subset" button is highlighted with a dashed border.

Figure 4, Confirm Process Submission

2.4.2.1 Email Delivery:

SMGR has the ability to run reports and deliver them to a predetermined Email address.

From the Confirm Process Submission window, click the Parameters button to open the Process Submission Parameters window.

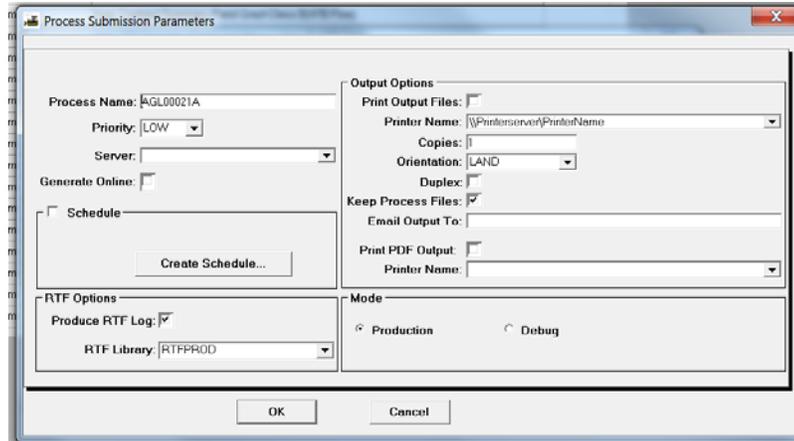


Figure 5, Process Submission Parameters

In the Email Output To data field, enter the Email address where the report will be delivered and click OK to save the submission parameters.

2.4.2.2 Desktop Delivery:

SMGR has the ability to run reports and deliver them to the desktop.

From the Confirm Process Submission window, click the Subset button to open the Select Subset window.

From the Select Subset window, select the desired criteria and click the OK button.

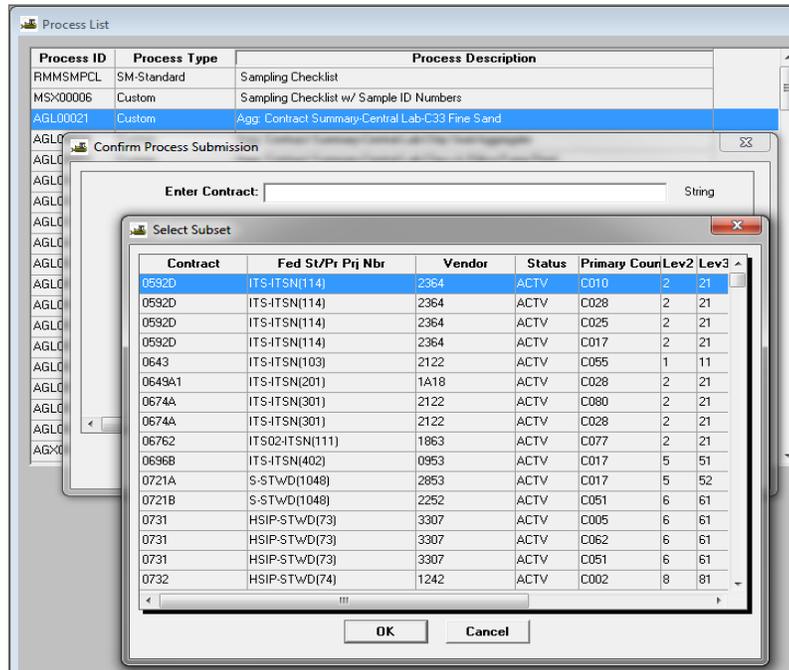


Figure 6, Select Subset

Click Submit

SMGR will present the following dialog boxes. Should other applications be open on the desktop, the Client Job Monitor and DPS Stats Monitor may open

within those layers. Minimizing the open windows will allow SMGR to present the Client Job Monitor and DPS Stats Monitor as the focus messages.

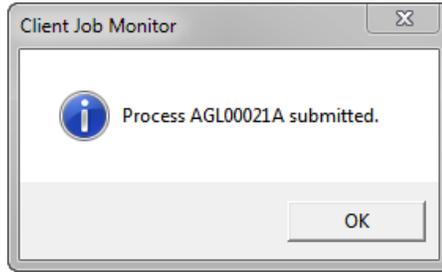


Figure 7, Client Job Monitor

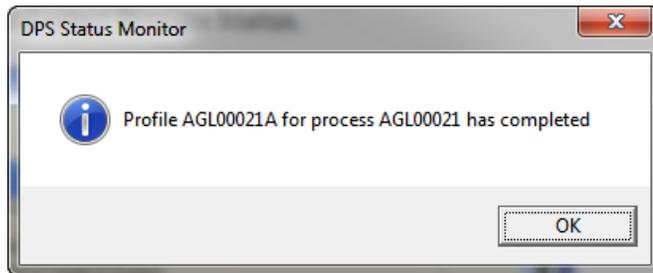


Figure 8, DPS Status Monitor

Click OK on both of them. The report will open automatically into your default Internet browser. All of the Internet Explorer features such as print, email, and save are available.

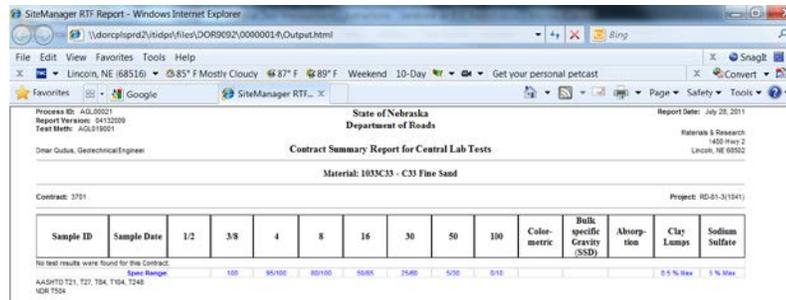


Figure 9, Sample SMGR Report

2.4.3 Process Status:

To review the status of a report or open it later, from the Services menu, select Process Status.

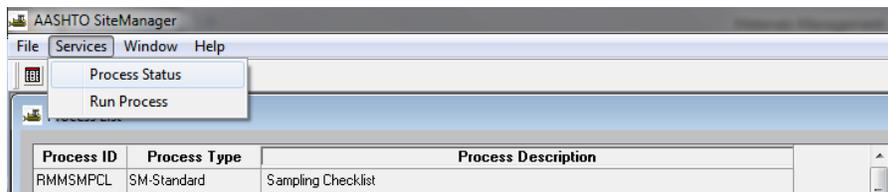


Figure 10, Process Status

SMGR will present the Process Status list. This list contains the reports that have been executed.

2.4.3.1 Regular Tab:

SMGR has the ability to run reports immediately.

Reports that are set to run in real time will be available on the Regular tab. To review a regular report, refer to Section 2.5.

Reports listed on the Regular tab will be deleted after seven days. Alternatively, a report can be removed manually from this tab by selecting the report and

clicking the Delete, , button. For more information about deleting a report, refer to Section 2.6.

2.4.3.2 Scheduled Tab:

SMGR has the ability to run reports on a schedule that can be determined by the user. These reports will run according to the timetable identified on the Scheduled tab.

To schedule a report, repeat steps 2.2 through 2.4.2.

From the Confirm Process Submission window, click the Parameters button to open the Process Submission Parameters window.

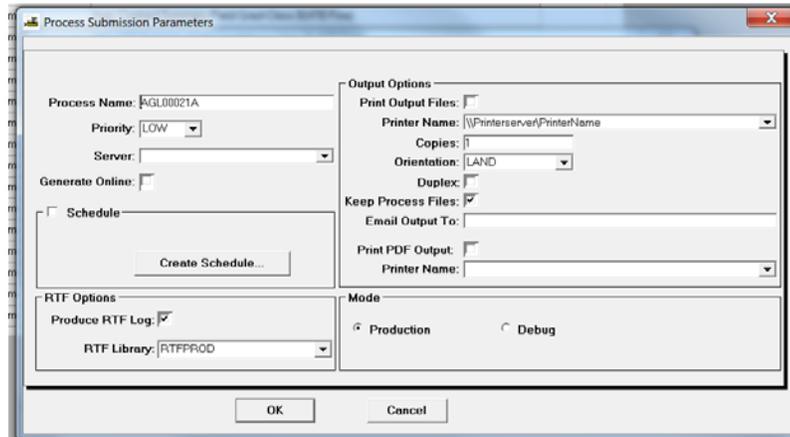


Figure 11, Process Submission Parameters

Click Create Schedule.

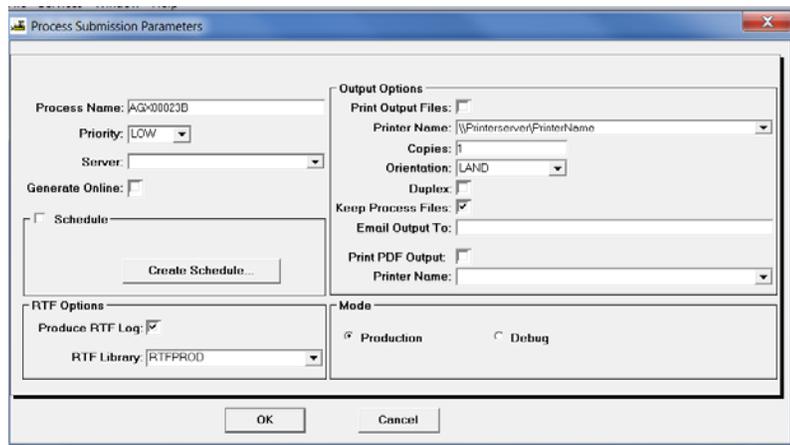


Figure 12, Process Submission Parameters

Select the date, frequency, and time. Click OK.

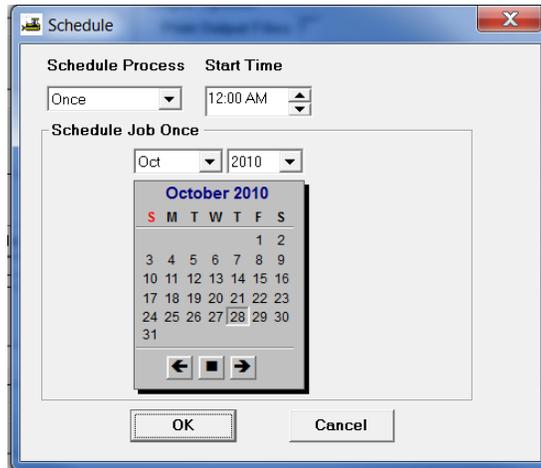


Figure 13, Schedule

Click OK to process the submission parameters.

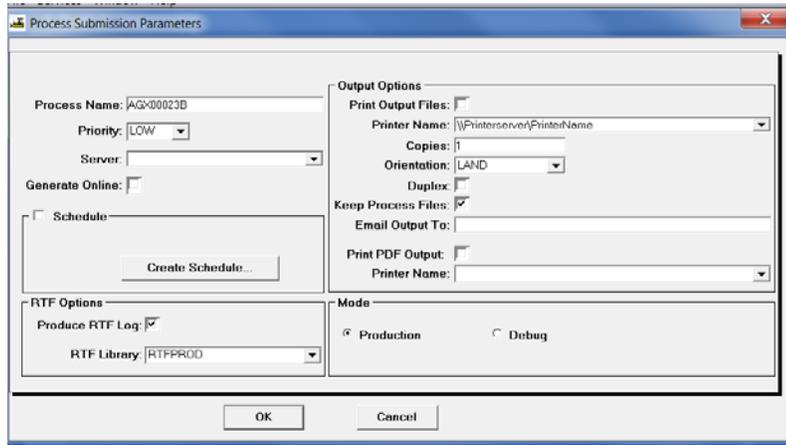


Figure 14, Process Submission Parameters

Click Submit to confirm process submission.

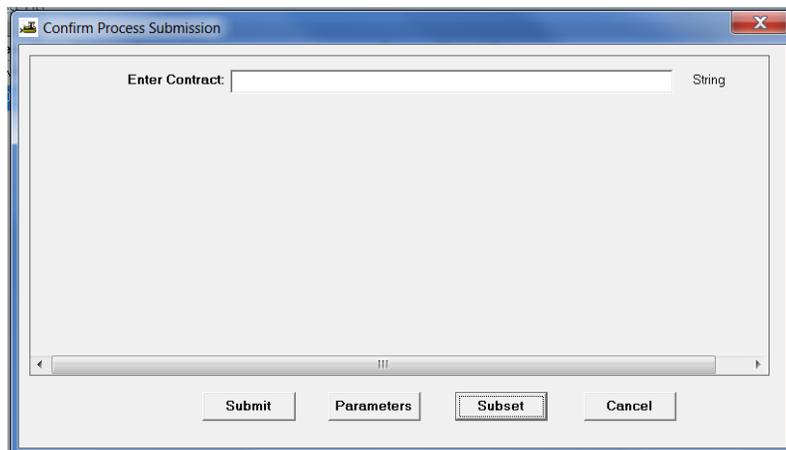


Figure 15, Confirm Process Submission

The report will run automatically at the predetermined date/time. Email delivery is available for reports run using the schedule option. Complete the Email Output To: field and the report will be delivered to the email address as determined by the user. See Section 2.4.2.1. for more information on Email delivery.

Should the delivery schedule require adjustment, double click the process name for the desired report and update the schedule parameters in the Schedule dialog box.

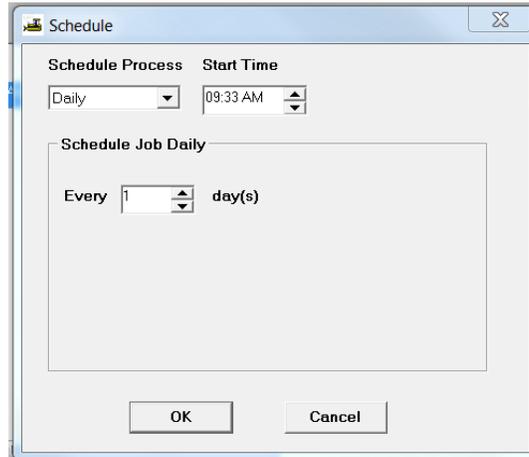


Figure 16, Schedule

Should the recipient or other report parameter(s) require adjustment, delete the existing report from the Schedule tab and repeat the steps provided in Section 2.4.3.2. to establish a new reporting schedule. For more information about deleting a report, refer to Section 2.6.

2.5 Review Report:

To review a regular report, double click the process name for the desired report.

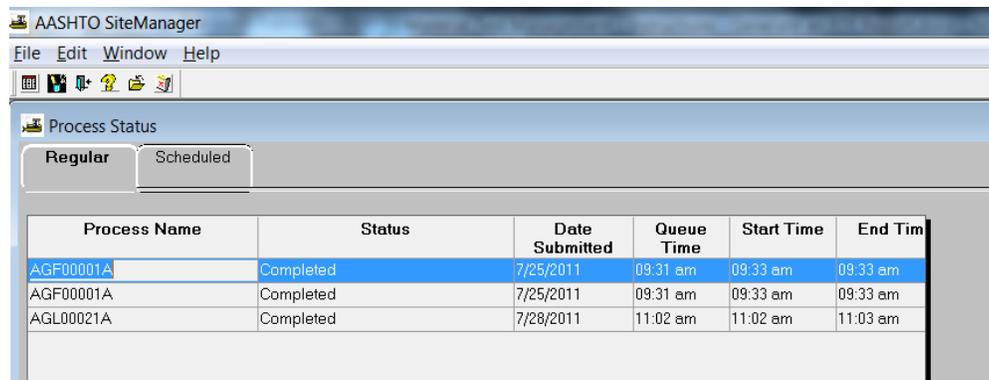


Figure 17, Process Status

Triple click Output.html.



Figure 18, Output

The report will be displayed in Internet Explorer. All of the Internet Explorer features such as print, email, and save are available.

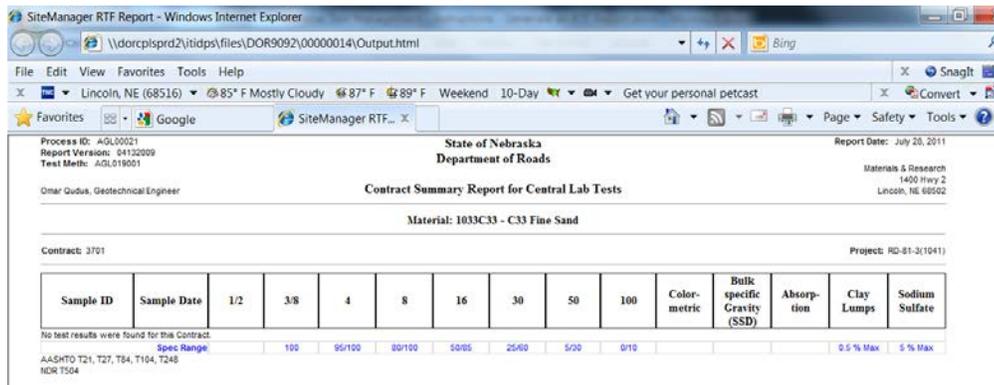


Figure 19, Example – SMGR Report

Reports listed on the Regular tab of Process Status will be deleted after seven days. Alternatively, a report can be removed manually from this tab by selecting the report and clicking the Delete button. For more information about deleting a report, refer to Section 2.6.

2.6 Delete Report:

SMGR provides for report deletion in two ways.

Reports listed on the Regular tab will be deleted automatically after seven days.

Reports can be removed manually from the Regular and/or Scheduled tabs by selecting the report and clicking the Delete button.