HEADLIGHT





Course Curriculum

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- Approve the Daily Diaries

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Course Curriculum (cont'd)

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Extras: Workspace Orientation

- <u>iPad</u>
- Web App / Lexicon
- Main Menu

Overview:

HeadLight and HDOT teams partnered to build a new Progress Payment form to optimize the monthly payment workflow. The form will reference pay item observations for installed quantities and reduce the need for manual calculations. Whether the inspector or project engineer enters the installed quantities, the PE (or OPE) has the ability to confirm item quantities before payment.

Objectives:

- Become familiar with tracking Pay Items in Fieldbook
- Understand the workflow to create the first progress payment in a new project in HeadLight
- Understand how to request project set-up configuration for progress payments

Outcomes:

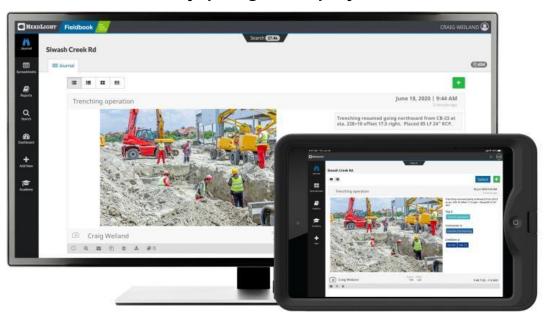
Upon completing this training, users will be able to:

- Collect pay item observations and quantities
- Create and approve project diaries
- Create progress payments
- Route progress payments through approvals

Pay Item Observations and Project Diaries

Pay items are:

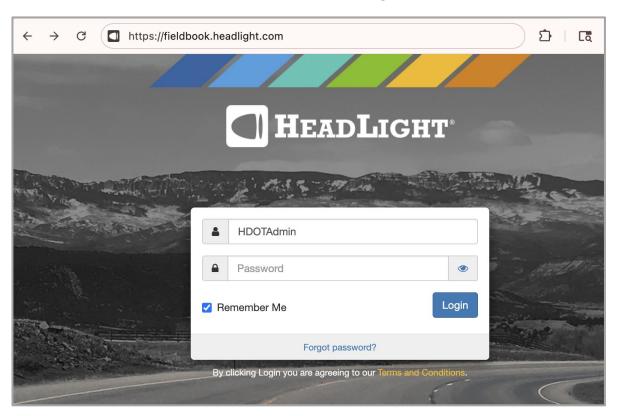
- Associated with a unit of measure and cost per unit.
- Captured in spreadsheet observations as work is done on a project.
- Must include the quantity received or placed.
- Entered accurately, in a timely manner, as materials are installed or when quantities are confirmed by the OPE/PE and the contractor.
- Used to to track the quantities of materials that are depleted or received.
- Must be included in an approved project diary to be included in a monthly progress payment



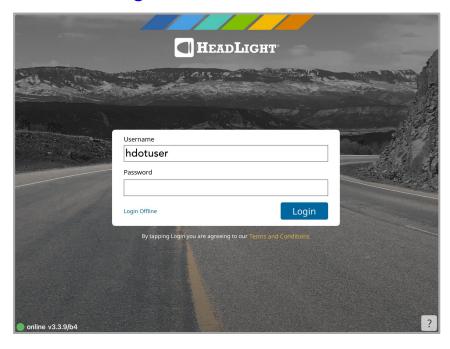
Log in to Fieldbook

User credentials provided by HeadLight work on both the Fieldbook Web app (on your computer or laptop) and the iOS App (on your iPad). Chrome is the recommended web browser for optimal experience

https://fieldbook.headlight.com



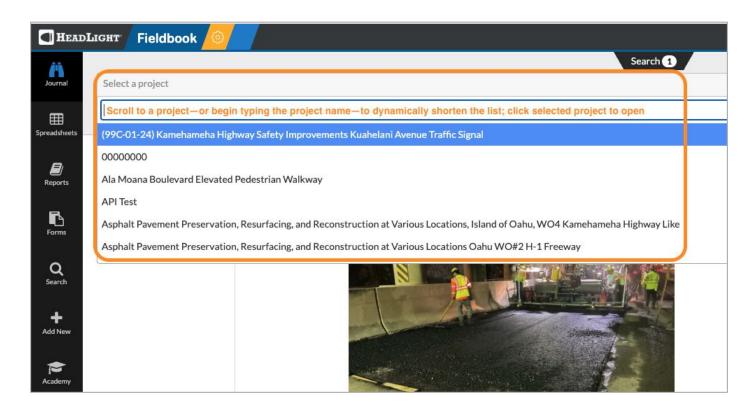
HeadLight Fieldbook for iPad



Select a Project

At a glance:

Fieldbook always opens to the project you were in when you logged off. Tapping or clicking on the active project name, in the upper left corner of the workspace, opens the project switcher.



- Log into <u>fieldbook.headlight.com</u> on either a desktop or iPad 1.
- Navigate to the active project 2.
 - Click on the project name a.
 - Scroll the dropdown list or begin b. typing in the search bar to dynamically filter the project list
 - Click on the desired project to open it C.



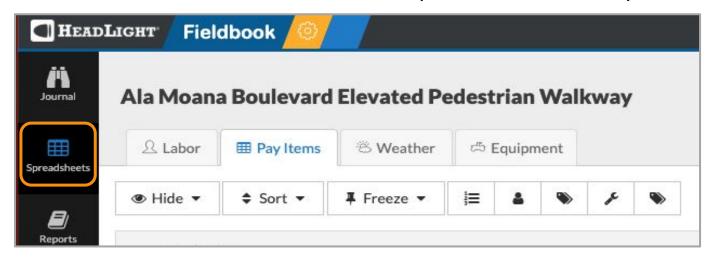
Play micro tutorial Click to see full screen

Deeper dive: If you cannot locate a project it either has not yet been added to HeadLight or you have not been added as a team member. Use the **HDOT** Project Creation Form to add a new project in HeadLight

Create a Pay Item Spreadsheet Observation

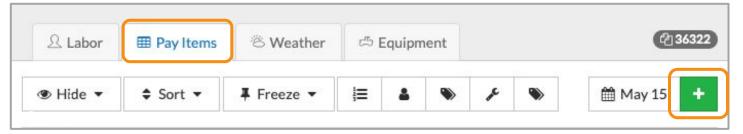
At a glance:

Enter pay items in the Spreadsheets section of Fieldbook. The blue icon is the current section. Based on your project's configuration, the tabs may be in a different order; this does not affect spreadsheet data entry.



- 1. Select the spreadsheets icon to see the available tabs.
- 2. Select the Pay Item tab.
- 3. Click the green square with the white plus sign (the add item button)

 Note: The date in the calendar picker defaults to today's date



- 3. Use the add button to create a new spreadsheet
- 4. The new row is dated today
 To create a row for a previous day, open the calendar picker and select the desired date the rows may reorder to stay chronological.
- 5. You are now ready to enter pay item data.

Deeper dive:

Upon first use, you will be prompted to allow location permission—select OK to allow capture of geolocation metadata.

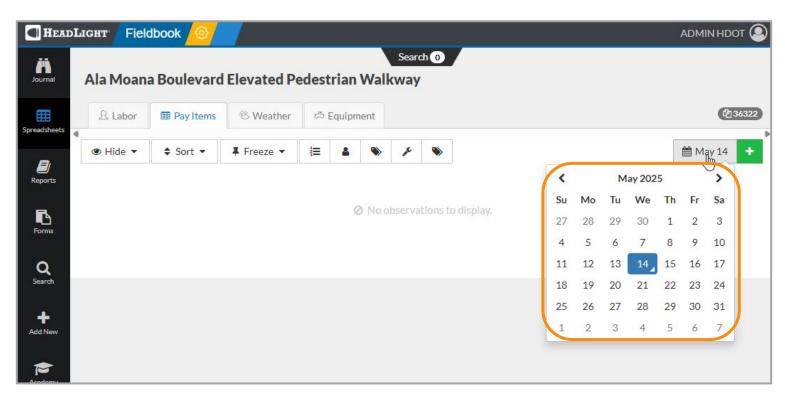


Create a Pay Item Spreadsheet Observation for a Past Date

At a glance:

It is often necessary to enter pay items for a previous date, such as a weekend or holiday, or to make an adjusting entry. The process is the same as on the previous slide, except for one important step:

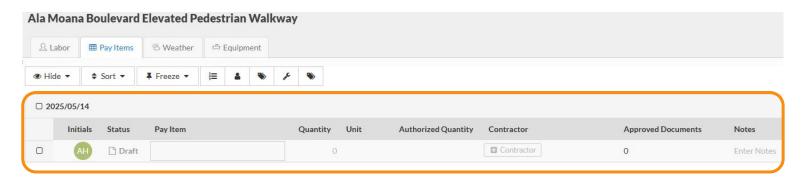
Use the date picker to open the calendar and select a date <u>BEFORE</u> selecting the green add button to create a new row.



Enter Pay Item Quantity Information

Steps to Complete:

 Navigate to the blank pay item observation added to the top row of the spreadsheet



- 2. In each new pay item observation, add, at minimum, a value for:
 - a. Pay Item
 - b. Quantity
 - c. Contractor



Deeper dive: Unit (of measure: LF for linear foot, etc.) and Authorized Quantity auto populate, distilling from the selected pay item



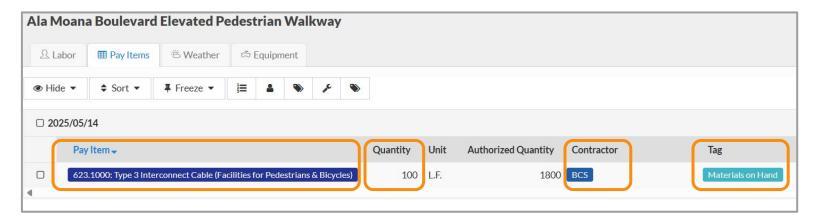
Account for Materials on Hand

At a glance:

As materials on hand (aka MOH or stockpile) are received or depleted, this must to be noted in HeadLight to ensure the payments are correctly tracking the project monies.

Add values in these fields:

- 1. Selected the desired pay item
- 2. Quantity
 - a. Enter a positive numerical value for added material
 - b. Enter a negative numerical value for depleted material
- 3. Contractor
- 4. Tags
 - a. For both added and depleted stockpile, locate the Tag column and add Materials on Hand from the drop down menu



Deeper dive:

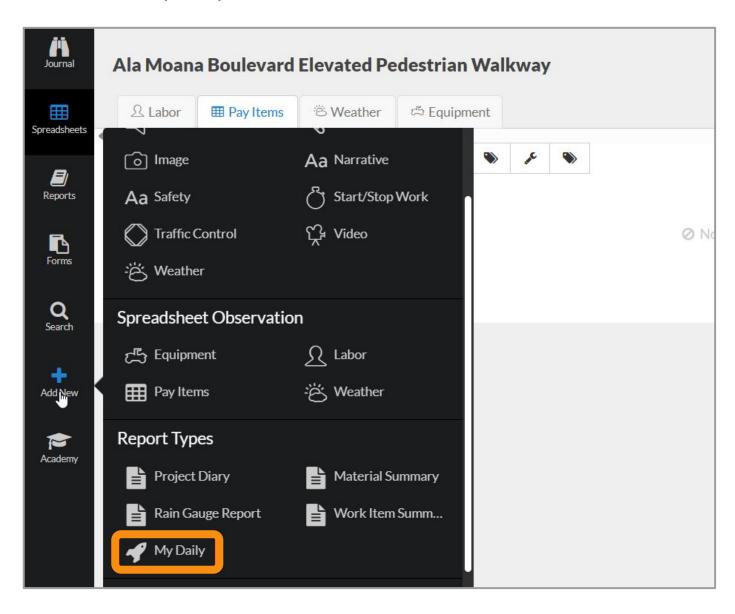
Materials on Hand quantities can also be entered directly on the Progress Payment form under the "Materials on Hand" section.

Create a Project Diary using My Daily

At a glance:

Throughout the day in the field, inspectors create journal and spreadsheet observations. It is essential these items are all tracked and reported within a Project Diary. Once you have created all of the necessary observations for the day, conclude the day by creating a Project Diary.

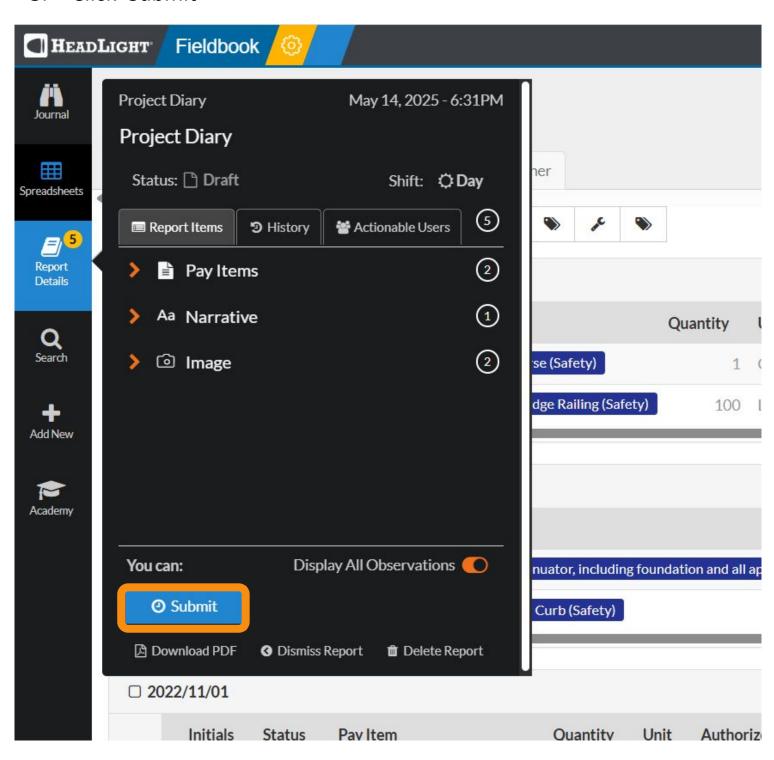
- 1. Select the Add New icon from the left hand navigation menu,
- 2. Click the My Daily icon.



3. This triggers Fieldbook to collect all observations created under your user profile and automatically compile them into a project diary.

Review and Submit a Project Diary

- After the My Daily button ato-creates your project diary the "cart" will open cart will appear (black pop-up window)
- 2. It is recommended to select Download PDF at the bottom of the cart.
 - a. Review your diary for accuracy and completeness.
- 3. Click 'Submit'

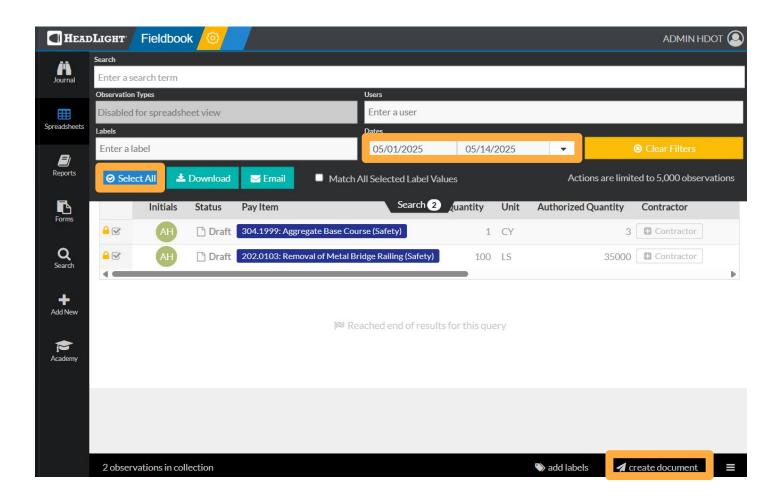


Create a Project Diary of Past Pay Items

Steps to Complete:

If there are pay item observations inadvertently left out of a monthly progress payment, users can collect the items and submit in a project diary to ensure they are approved and included in the progress payment.

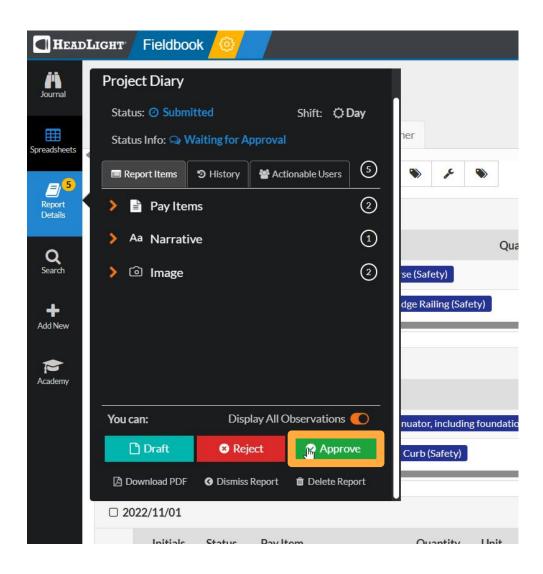
- 1. Open the Search tab to see data for a specific date or date range
 - a. Enter the desired date range using the calendar picker.
 - b. Click Select All on the bottom left o the Search tab window.
 - c. Or scroll and select the individual entries for the diary.
- 2. Once the Observations are selected, look to the bottom right corner and select Create Document.
- 3. Click Create.
- 4. Click Submit.



Approve the Project Diaries

At a glance:

Pay Items to be used in Progress Payments need to be included in Approved daily diaries. These can be approved at any point prior to being included in a Progress Payment.



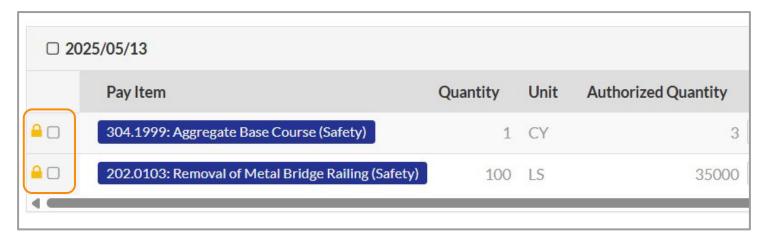
Deeper dive:

Users need to have office user level access to be able to approve a Diary.

Prepare to Create a Progress Payment

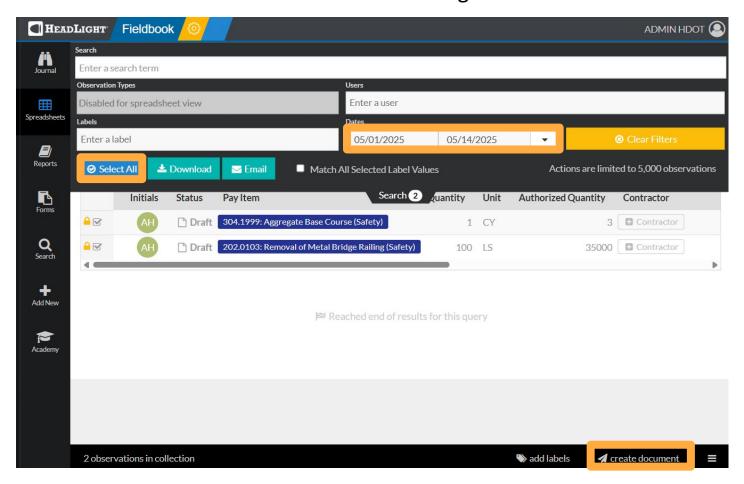
Steps to Complete:

- 1. Navigate to the Pay Item spreadsheet.
- 2. Verify the pay item observations to be included in the progress payment have a yellow lock icon (They are in an approved report).
 - a. If not, you will need to <u>create and/or approve them in a Project</u>
 <u>Diary</u>.

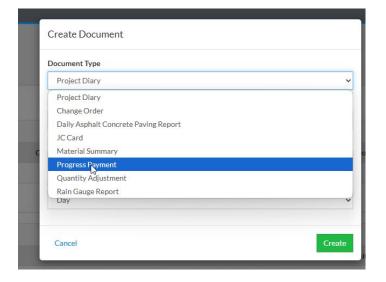


Create a Progress Payment

- 1. Navigate to Search and open the window.
- 2. Use the Date fields select the time range for the month to filter to show only the Pay Item Observations from the correct month.
- 3. Click Select All to capture everything for the month.
- 4. Select Create Document in the bottom right corner of the screen



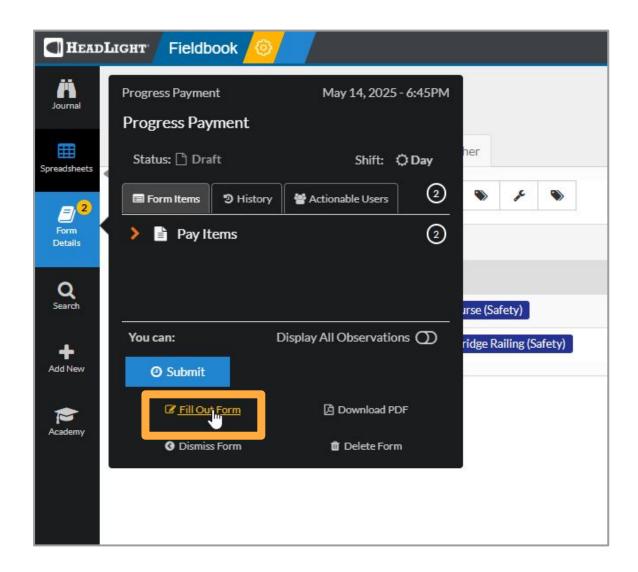
- 5. Under Document Type select Progress Payment
- 6. Click Create



Edit the Progress Payment Form

Steps to follow:

- 1. After creating a new Progress Payment, the Form's cart will open
- 2. Click Fill out Form
- 3. The Progress Payment Form will open in a new tab



There can be only one open progress payment at a time. If you attempt to create a new form when another Progress Payment is still open, you will see this alert at the top of your Progress Payment document.

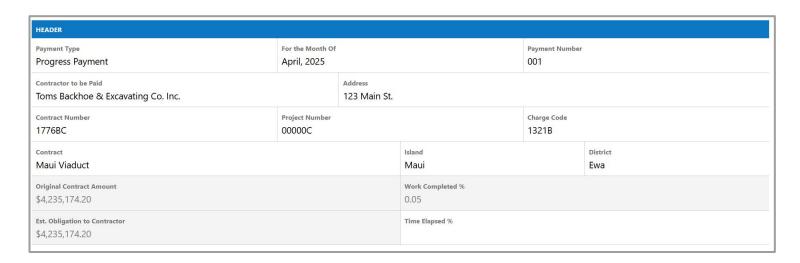
▲Payment already in progress There is already a payment in progress: "Progress Payment - March 2025 [2]". Only one payment can be in progress at a time for a project

Review the Header

At a glance:

Most fields should be automatically filled out but all fields may be edited if needed:

- Payment Type
- For the Month Of
- Payment Number This is the total number of approved payments on the project plus 1
- Contractor to be Paid The Primary Contractor on the Project
- Address The Contractor's Address where they receive Estimates
- Contract Number
- Project Number
- Charge Code
- Contract Contract Name
- Island
- District
- Original Contract Amount The Total Bid Amount for the Contract
- Est. Obligation to Contractor Estimated Dollar Amount to be Paid to the Contractor
- Work Complete % Quantity Installed divided by Total Bid Amount times 100
- 'Time Elapsed %' can be manually calculated



Review the Payment Totals

At a glance:

The Payment Totals are the sum of all of the Pay Item Ledger, Materials On Hand, Liquidated Damages, and Retention.

- 1. These fields are automatically populated from the current and past (Approved) Progress Payments
- 2. For the first Payment on a Project, the 'Grand Total Paid to Date this Contract Not Including this Payment' should equal \$0.00
- 3. The 'Total Materials On Hand Additions' and 'Total Materials On Hand Depletions' will be \$0.00 until the 'Cost per Unit' value is entered under the 'Materials On Hand' section is completed on the current Progress Payment

Amount For	Participating	Non-Participating	Total
Total Work Completed this Payment	\$2,100.00	\$0.00	\$2,100.00
Total Materials On Hand Additions	\$0.00	\$0.00	\$0.00
Total Materials On Hand Depletions	\$0.00	\$0.00	\$0.00
Total Liquidated Damages	-22		\$0.00
Total Retainage Released		(55)	\$0.00
Total Amount Retained			\$0.00
Total Retainage Including This Payment		(55)	\$0.00
Grand Total Paid to Date this Contract - Not Including this Payment	\$0.00	\$0.00	\$0.00
Grand Total Paid to Date this Contract - Including this Payment	\$2,100.00	\$0.00	\$2,100.00
Grand Total Due this Payment - Pay Items and Materials On Hand	\$2,100.00	\$0.00	\$2,100.00

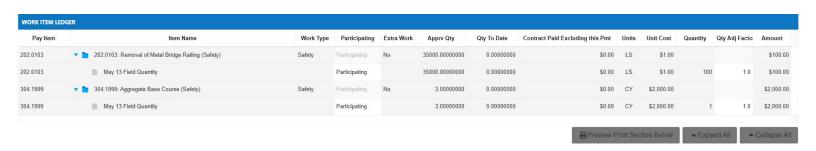
Deeper dive:

If values are not adding to the expected values, changes will need to be made to the included pay items, materials on hand, liquidated damages, retention items, or the overall contract in HeadLight might need to be reviewed and adjusted.

Review the Pay Item Ledger

Process Steps

- All of the Pay Items that were charged in the Progress Payment will be listed here
 - a. This section is grouped by Pay Item and will show each Date on which the Pay Item was charged
- 2. Each column calculates the values charged this payment and some include values from previous Progress Payments
- 3. 'Qty Adjustment Factor' can be used to withhold a percent of the Pay Item value back
 - a. Each will show '1.0,' which equals 100%
 - Example: If you need to hold 30% of the quantity and payment of that item, you would enter '0.7'
- 4. Preview Print Section Below
 - This opens a complete list of all Pay Items on the Contract including those that do not have associated observations in this Progress Payment
- 5. Expand All Expand all Pay Item groups within the 'Work Completed' section
- 6. Collapse All Collapse all Pay Item groups within the 'Work Completed' section



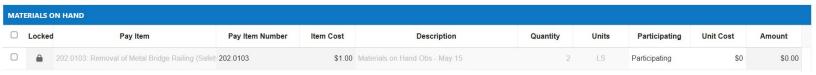
Deeper dive:

Participation status of each Pay Item should default to how the Pay Item is set up in the contract, but can be manually changed, if needed.

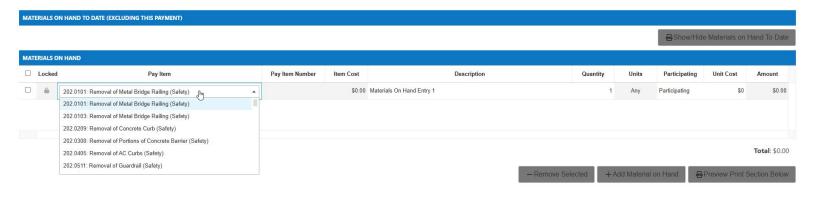
Review the Materials On Hand

At a glance:

- Each Pay Item Observation with the 'Materials on Hand' tag will appear here
 - a. Use the 'Unit Cost' to calculate the Materials on Hand Amount that was Added or Depleted



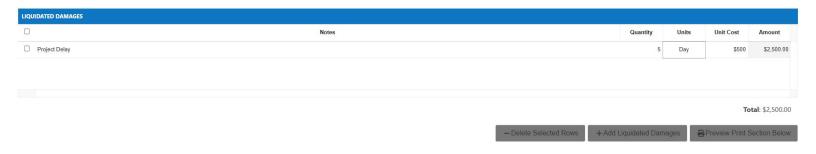
- 2. The Total Amount of the section will appear under the 'Payment Totals' section
- Users can add Materials on Hand amounts using the "Add Material on Hand" button
- 4. Either select a Pay Item the MOH amount applies to or leave it blank



Review the Liquidated Damages

At a glance:

- 1. Use 'Add Liquidated Damages' to calculate any required amounts
- 2. Enter values into the 'Quantity,' 'Unit,' and 'Unit Cost' to calculate the Liquidated Damages Amount that was Added or Depleted
- 3. The Total Amount of the section will appear under the 'Payment Totals' section



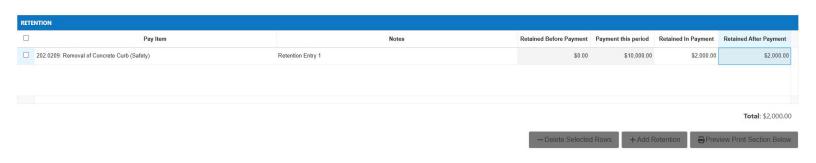
Deeper dive:

A positive value entered into Liquidated Damages will show up as a negative in the Payment Totals (a deduction).

Review the Retention

At a glance:

- 1. Use 'Add Retention" to calculate any required amounts
- 2. Enter values into the 'Quantity,' 'Unit,' and 'Unit Cost' to calculate the Retention Amount that was Added or Depleted
- 3. The Total Amount of the section will appear under the 'Payment Totals' section



Deeper dive:

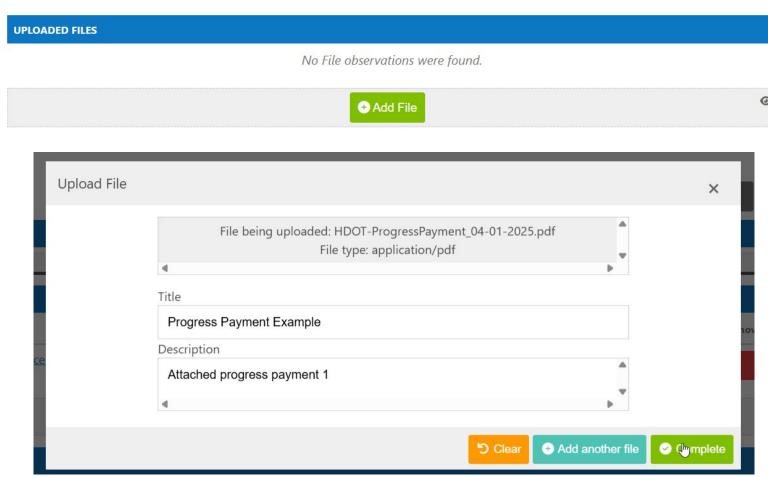
Retention items included in an Approve Progress Payment will be carried over to the following Progress Payment and can be added to or deducted from, as needed.

Upload Related Files

At a glance:

Any related files may be attached to support the payment information. The upload files section can accept any file type.

- 1. Click Add File
- 2. Select the file from your device
- 3. Add a title and description to the file
- 4. Add any additional files, as needed
- 5. Click Complete

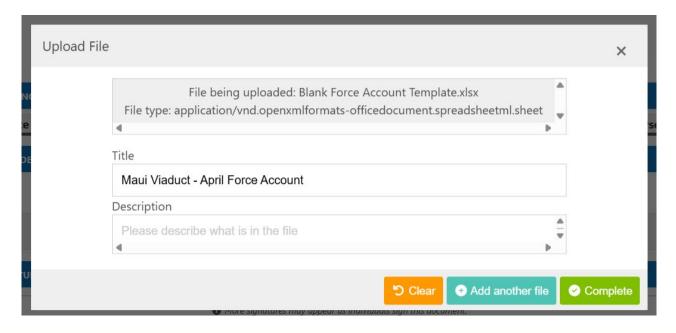


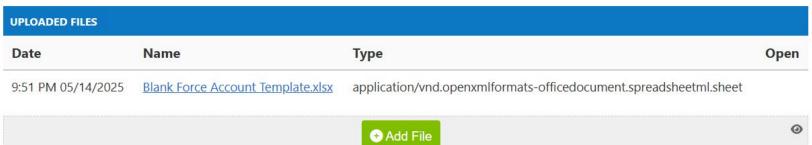
Force Account

At a glance:

Any Force Account amounts that occur are required to be uploaded to a Progress Payment in HeadLight. When a Force Account form is created and submitted in Autodesk Construction Cloud (ACC), you will attach the form to an active Progress Payment form.



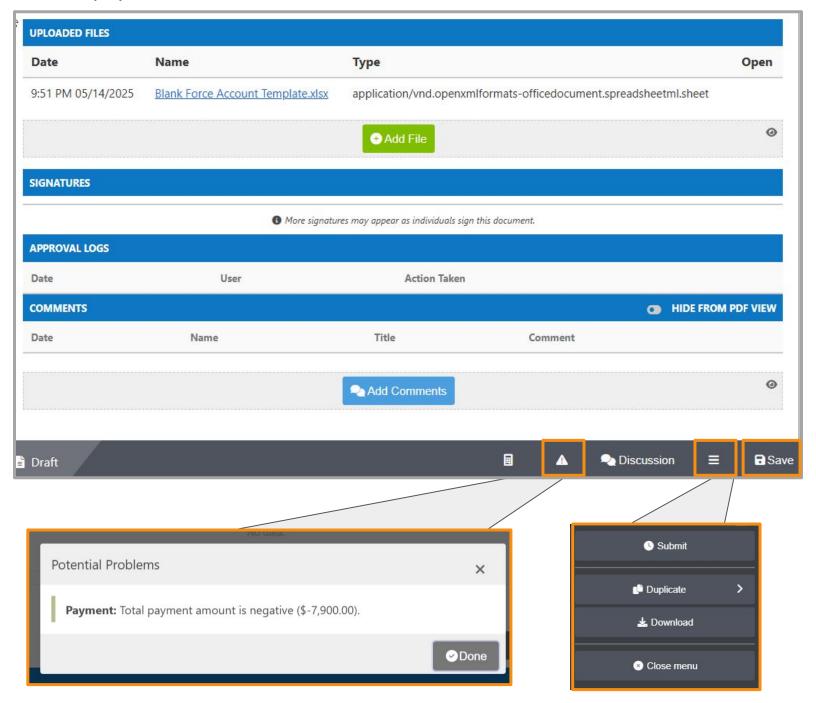




Save and Submit the Progress Payment

Steps to Follow:

- 1. Review the Payment Totals section for accuracy.
- 2. Click the Save button in the bottom right corner.
- 3. Check the calculations and the potential errors log before submitting.
- 4. Open the Actions Menu (aka the hamburger icon).
- 5. Select Submit.
- 6. Congratulations—you successfully submitted an HDOT progress payment!

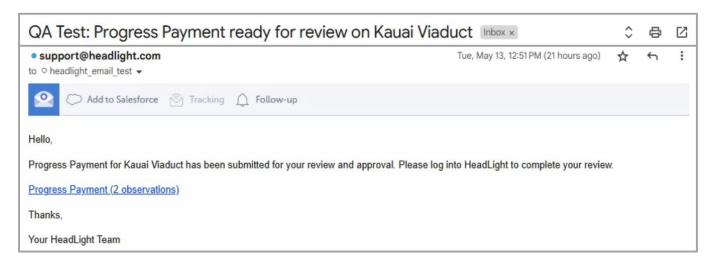


Approval Workflow

At a glance:

Depending on the island, the approval workflow may differ. Within each payment, there is a default approval workflow with specific people required to sign. Those specific people can be changed before submission.

Users will receive an email notification to sign at the appropriate point in the user workflow.



If the Form is rejected by an actionable user during the approval workflow, the form will return to draft status and all signatures will be removed.

Oahu

- 1. Embedded Consultant (if part of the project) will review the payment to ensure it's correct
- 2. RE
- 3. Contractor
- 4. CE
- 5. DE

Other Islands

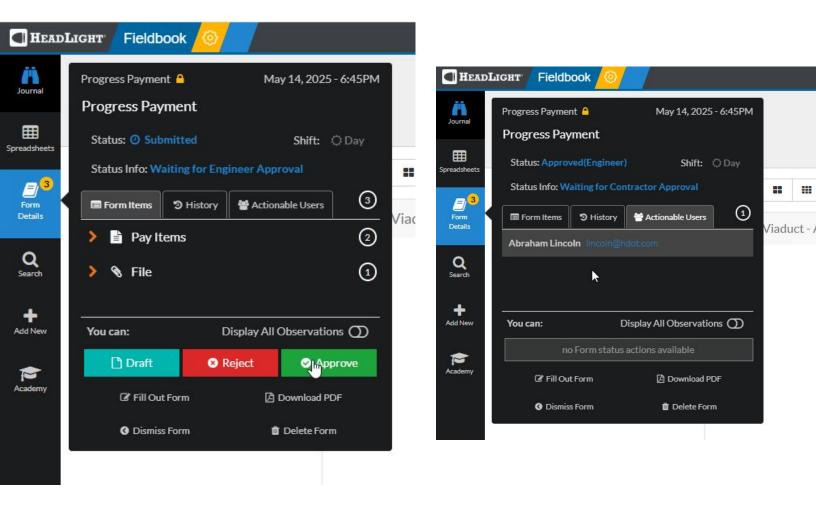
- 1. Embedded Consultant (if part of the project) will review the payment to ensure it's correct.
- 2. Engineer
- 3. Contractor
- 4. CE
- 5. DE

Engineer or RE Approval

At a glance:

Engineer approval roles (or RE on Oahu) are set at the initial configuration of the project and can be input in the <u>Project Creation Request Form</u>. If the correct individuals are not actionable at the appropriate steps, please contact support@headlight.com to make changes to the roles.

The actionable users tab can used to see who can take action at each step of the approval.



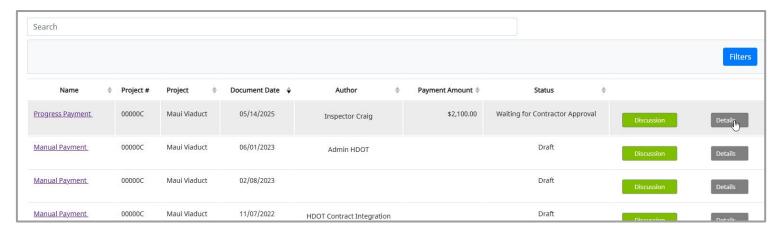
Deeper dive:

Temporary Assignments can be set up as needed by contacting support@headlight.com as well.

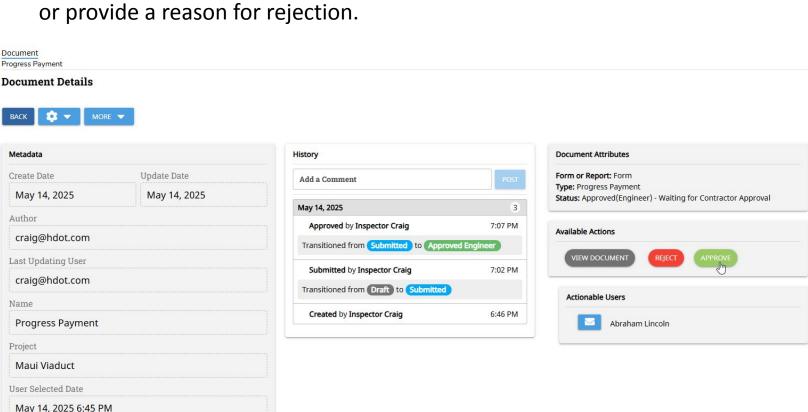
Contractor Approval

At a glance:

Upon Engineer (or RE) approval contractor will receive a link, via email, that will direct them to a dashboard in the Home App; they do not access Fieldbook.



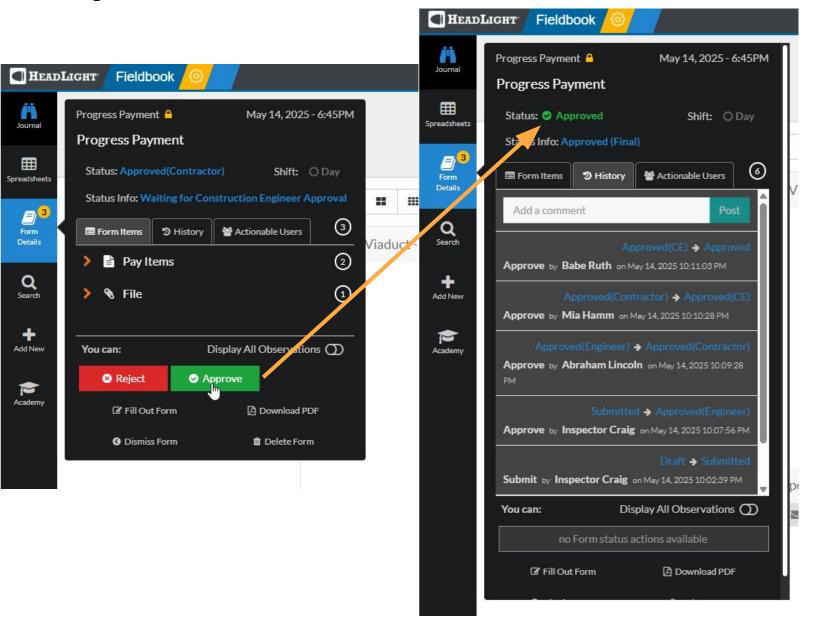
They can click into the document for review to Approve/Reject. If needed, they can leave a comment in the History area to ask a question or provide a reason for rejection.



CE & DE Approval

At a glance:

Construction Engineer and District Engineer approval roles are set at the initial configuration of the project and can be input in the Project Creation Request Form. If the correct individuals are not actionable at the appropriate steps, please contact support@headlight.com to make changes to the roles.



Deeper dive:

Temporary Assignments can be set up as needed by contacting support@headlight.com as well.

Thank you very much for your time and participation today!

Your Trainer:

Craig Weiland

Type of Training:

Progress Payments

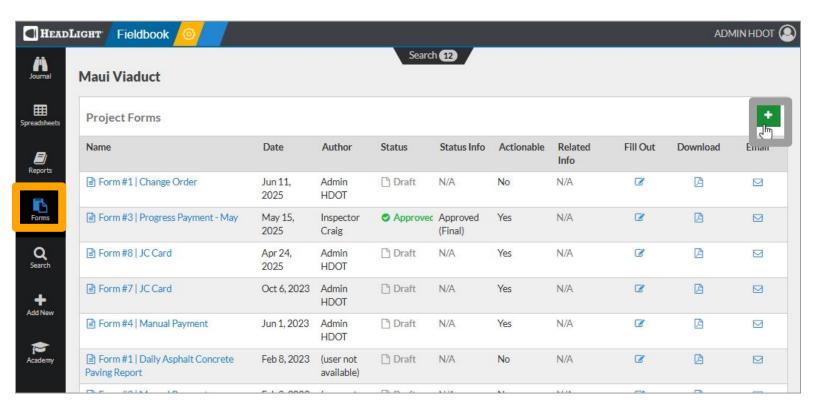


Please take a moment to complete a brief training survey. Aim the camera on your iPad or mobile phone at the QR code and click the web link that pops up to begin the survey.

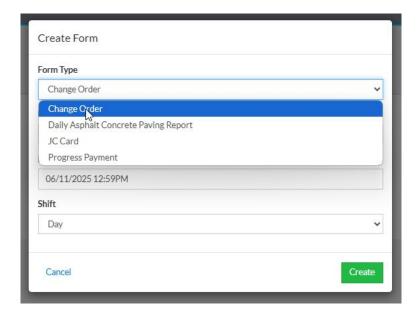


Create a Change Order

- 1. Navigate to the Forms Tab
- 2. Click the green plus button

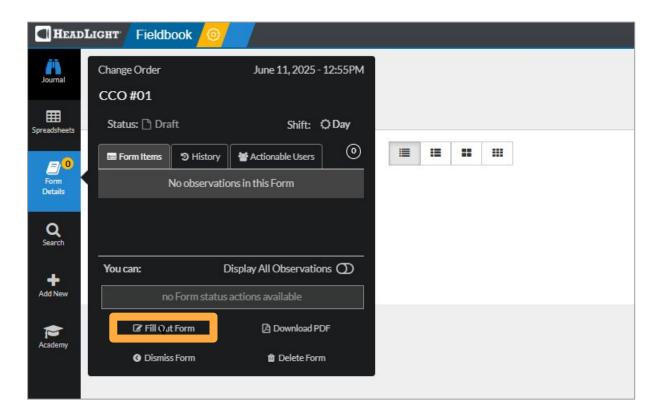


- 3. Under Document Type select Change Order
- Modify the Form Name (typically CCO#01, or similar)
- 5. Modify the Form Date and Shift, if needed
- 6. Click Create

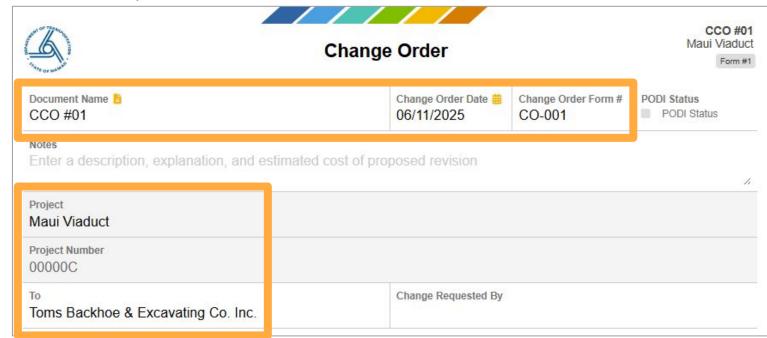


Fill Out Change Order

- 1. In the form cart, click Fill Out Form
- 2. The Change Order Form will open in a new tab

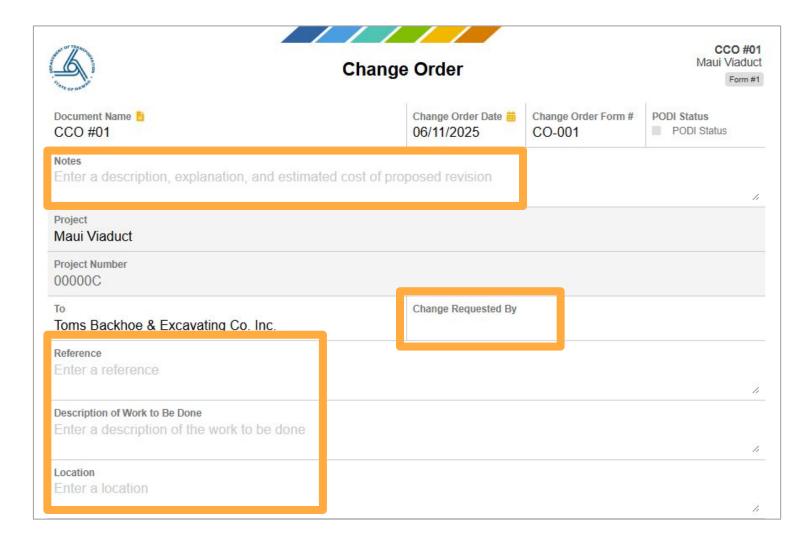


- 3. The following fields are populated based on project information.
- 4. Change Order Date, Change Order Number, and To fields can be edited, if needed.



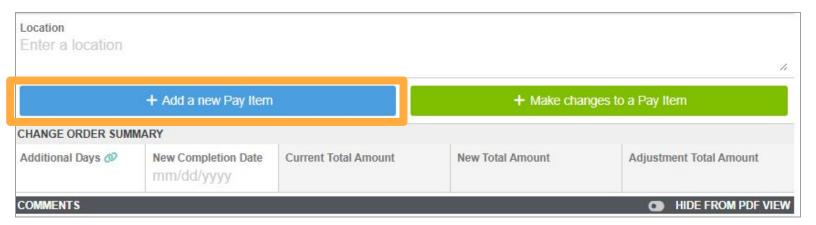
Fill Out Change Order (cont'd)

- 5. Fill out the following fields, as needed.
 - a. Notes
 - b. Change Requested By
 - c. Reference
 - d. Description of Work to be Done
 - e. Location

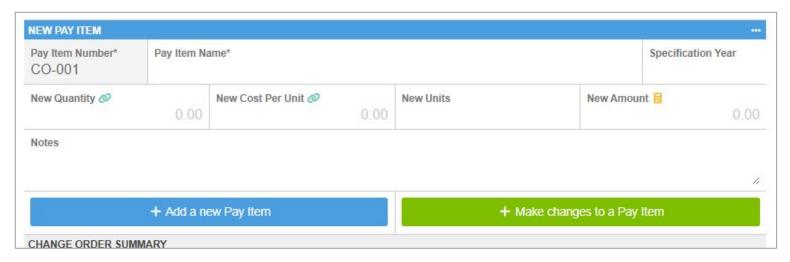


Add New Pay Items

 To add a new Pay Item to your Contract, click the blue Add a new Pay Item button, below the document header information



2. This will create a new section within the form to enter new Pay Item information.



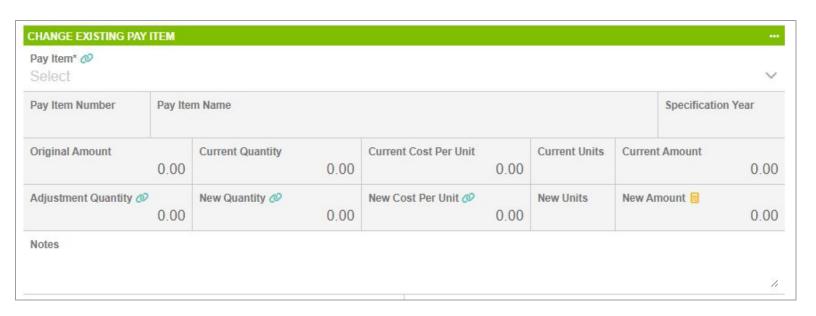
- 3. Fill out the Pay Item fields
 - a. Pay Item Name (Should be entered as 000.0000: Description)
 - b. Specification Year
 - c. New Quantity
 - d. New Cost per Unit
 - e. New Units
 - f. New Amount (auto calculated)
 - g. Notes (optional)
- 4. Add additional Pay Items, as needed

Update Existing Pay Items

 To make changes to an existing Pay Item, click the green Make changes to a Pay Item button, below the document header information

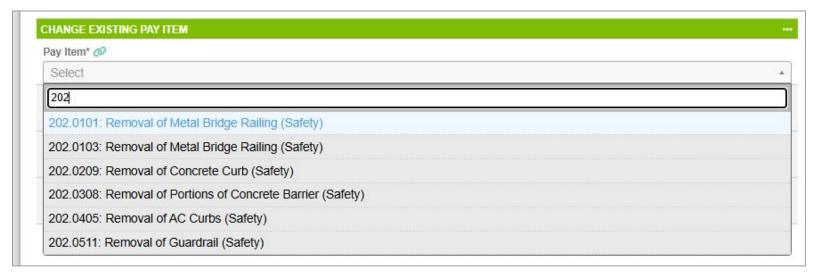


2. This will create a new section within the form to Change Existing Pay Item

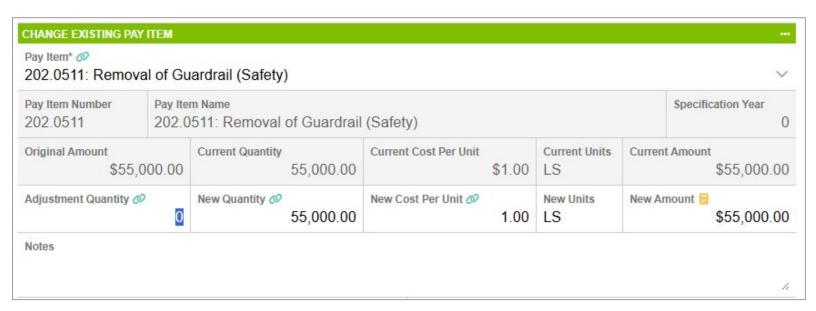


Update Existing Pay Items (cont'd)

3. Click into the Pay Item field to see a drop-down of the existing pay items. You can click in the field to type a number or description to narrow down the options.



4. Once selected, the Pay Item information will appear.



- 5. Edit the quantity by using the Adjustment Quantity or New Quantity fields
 - New Amount will auto-calculate based on New Quantity and New Cost Per units
 - b. Add Notes, if needed
- Click the green button to Change addition existing Pay Items, as needed

Delete New or Updated Sections

If a New Pay Item (blue) or Change Existing Pay Item (green) section needs to be deleted, you can remove they from the document.

1. Click the 3 dots in the top right of the section to see the dropdown menu



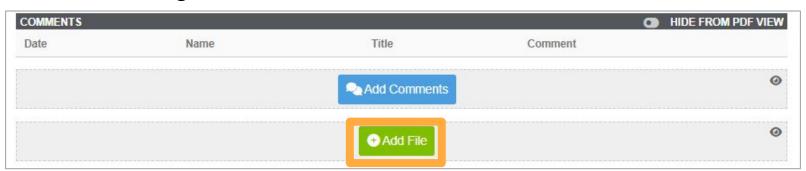
2. Click Delete



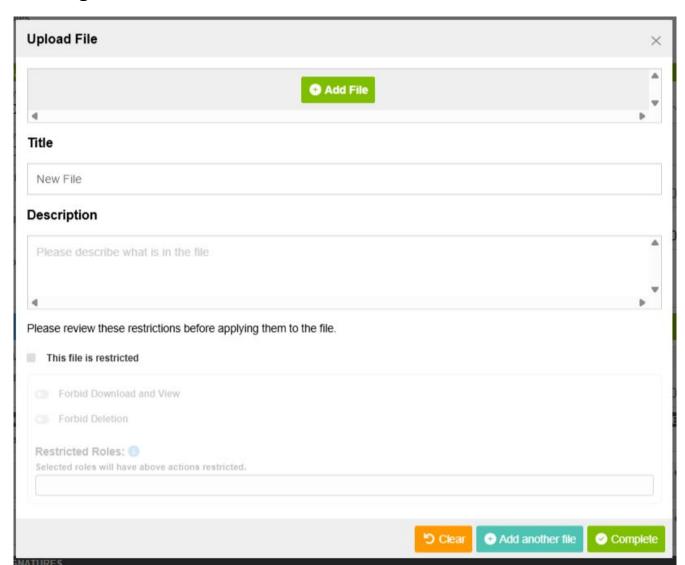
Attach Files to Change Orders

At the bottom of the Change Order form is a summary of all of the New Pay Items and Changes to Pay Items. Below that, you can choose to attach files, as necessary.

1. Click the green Add File Button



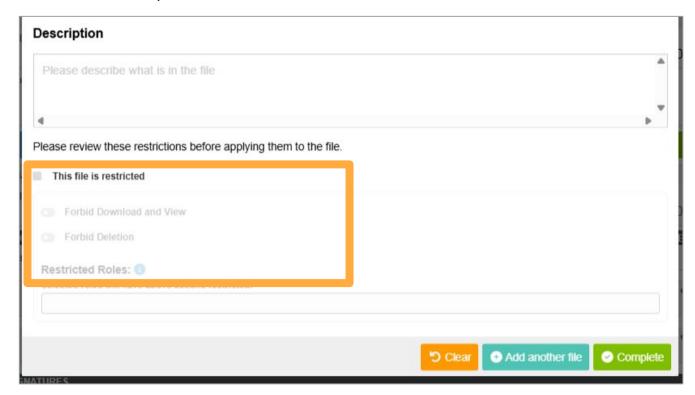
2. Use the File Uploader to add any type (or number) of files to the Change Order form



Manage Permissions for Files in CO

At the bottom of the Upload File box is the option to add restrictions for that file.

- 1. Click the check box next to 'This file is restricted', if needed
- 2. Click the toggles next to 'Forbid Download and View' or 'Forbid Deletion', if needed



3. Restrictions are enforced based on roles; choose a role that you want to restrict. For Contractors, select HDOT-Contractor

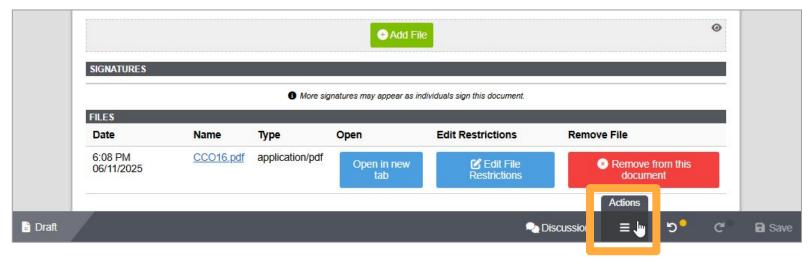


- 4. Click the Add another file button if additional documents are needed.
- 5. Click the green Complete button

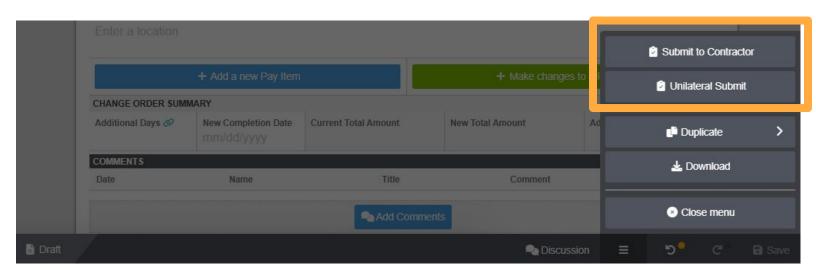
Submit Change Order for Review

Once you have completed all sections of the Change Order and checked it for accuracy, you can submit the document for review.

1. Click the Actions button in the bottom toolbar (three bars)



- 2. You can choose to Submit to Contractor or Unilateral Submit if the change order was already agreed upon by the contractor
 - a. Contractor or CE will receive email notification, depending on which is chosen



Deeper dive:

Once submitted, approval Roles follow the same path as Progress Payments to the Construction Engineer and then District Engineer. Temporary Assignments can be set up as needed by contacting support@headlight.com as well.

Thank you very much for your time and participation today!

Your Trainer:

Craig Weiland

Type of Training:
Change Orders



Please take a moment to complete a brief training survey. Aim the camera on your iPad or mobile phone at the QR code and click the web link that pops up to begin the survey.



Workspace Orientation: iPad App

At a glance:

Upon logging in, you will arrive at the Journal observation area. Subsequent logins will return you to the last project and section of Fieldbook you visited: whether it be the Journal, Spreadsheets or Reports.

Learn more—
HeadLight Academy:

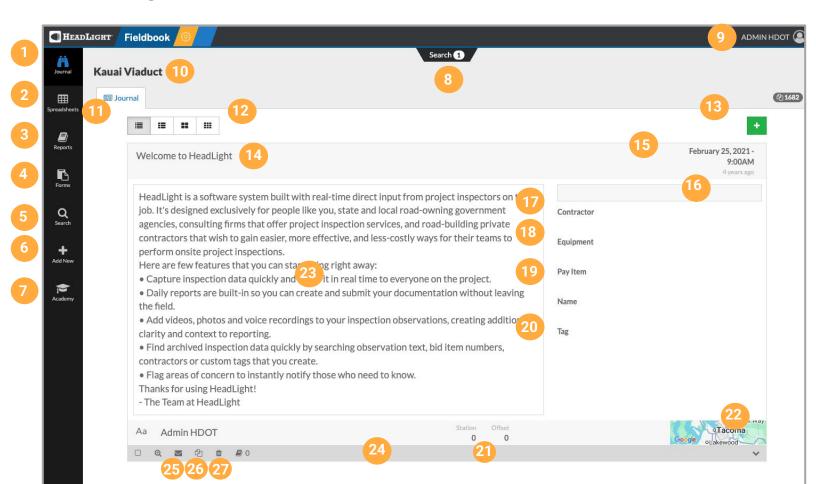
Navigating Fieldbook



Deeper dive:

By default, the observations displayed are only those created today. In other words, when you open Fieldbook for the first time on a given day no observations will appear in the list. You begin with a blank slate. To review your observations from previous days and/or observations created by other users, open the Search tab and adjust your filters accordingly.

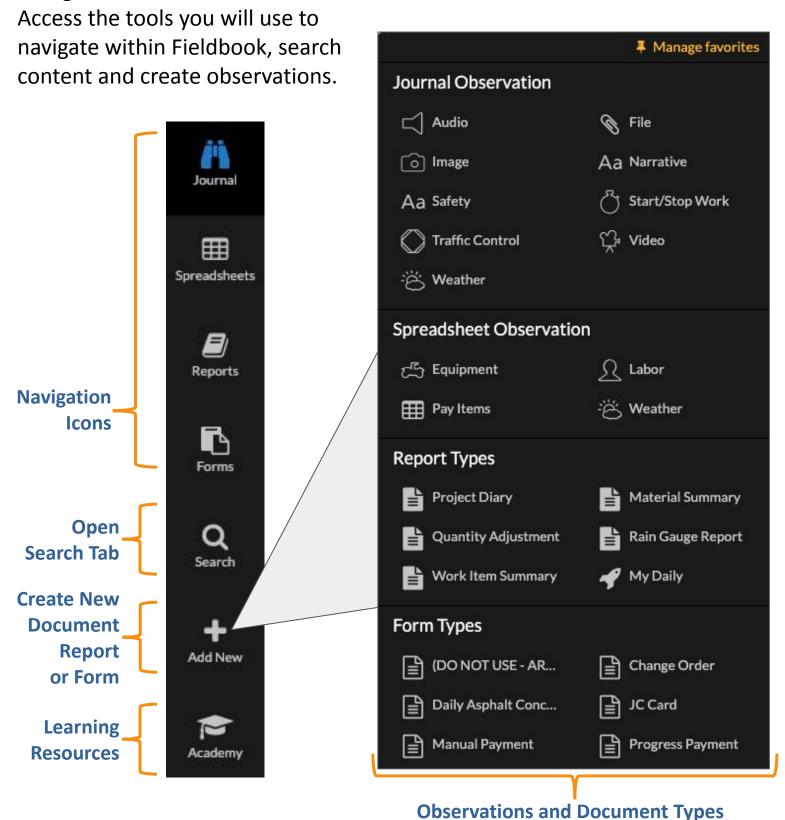
Workspace Orientation: Lexicon



1. Journal Observation	10. Workspace Title	19. Pay Item Label
2. Spreadsheet Observations	11. Tab Name	20. Tag
3. Reports	12. Select Button	21. Station/Offset Fields
4. Forms Link	13. Create New Observation	22. GPS Coordinates
5. Open Search Tab	14. Observation Title	23. Observation Content
6. Add New	15. Time Stamp	24. Observation Tool Bar
7. Academy Link	16. Content Description	25. Email Observation
8. Search Tab	17. Contractor Label	26. Clone Observation
9. User Menu	18. Equipment Label	27. Delete Observation Button

Workspace Orientation: Main Menu

At a glance:



Deeper dive: Manage favorites (at the top of the observation window) to pin

observation, report or form icons to your side navigation menu for easy access

Change Log

Summary of Change(s)	Date of Edit	Author
Created Training Slides for Progress Payments	5/15/2025	C.Weiland
Created Training Slides for Change Orders	6/11/2025	C. Weiland