



# Florida Department of Transportation

## Trns•port PES

### Maintenance Project and Proposal Guide



JANUARY 2014



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## Introduction

This User Guide describes the procedures involved in establishing and maintaining maintenance projects and proposals in the Trns•port Proposal and Estimates System (PES) for contracted maintenance. A high percentage of maintenance contracts are repeats, or near repeats, of contracts that have been let in the past. Because of this, attention will be given to establishing template projects for use by maintenance personnel to rapidly create new projects and proposals.

This Guide complements the Reference Manual for Maintenance Projects. This Guide is reduced in scope to be a quick reference and reminder of steps and procedures in creating and maintaining projects and proposals for maintenance contracts.

## Appendices

Appendix A shows the structure of Access Control Groups.

## Creating and Managing Projects

### Adding and Changing Projects

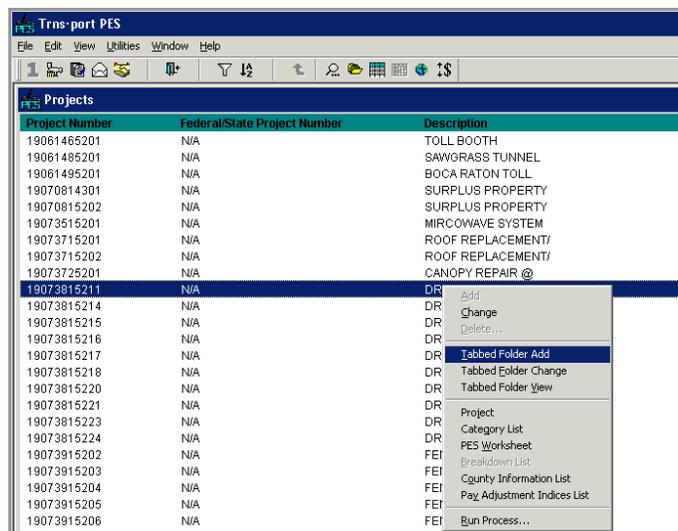
This Guide focuses on bringing projects into PES by using the copying approach in conjunction with the interface program to the Financial Management (FM) system.

To create a new project, use the FM Interface to create the project header and then add project details for the new project, or enter a few fields of data to create a project header and then complete information from the FM Interface.

### Creating a Project Header

To create a project header:

- Access the Project List window. 
- Place the cursor anywhere in the white space.
- Click the right mouse button.
- Click **Tabbed Folder Add**.

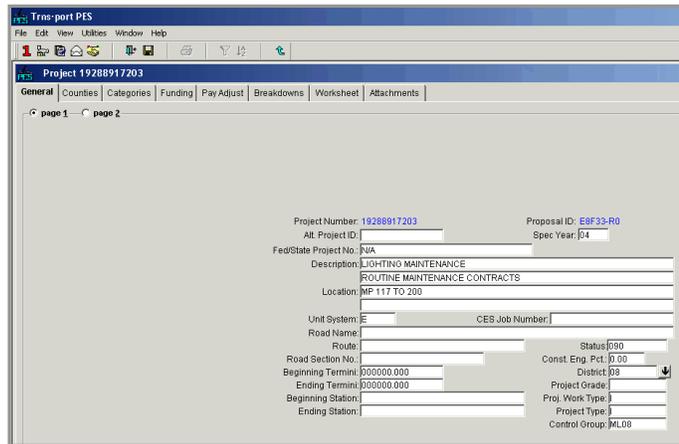


The resulting screen is page 1 of the General Tab of the project header.

Some of these tabs may be "grayed out" on your screen indicating that you do not have access to them. If you need access, see your Central Office Maintenance PES Security Coordinator.

Enter the minimum amount of information to satisfy Trns•port system requirements, and then save the project.

Proceed to enter data in page 1 of the General Tab for the following fields:



- |                                     |                                |  |
|-------------------------------------|--------------------------------|--|
| <i><b>Project Number</b></i>        | <i><b>Spec Year</b></i>        | <i><b>Fed/State Project No.(N/A)</b></i> |
| <i><b>Description</b></i>           | <i><b>Unit System</b></i>      | <i><b>District</b></i>                   |
| <i><b>Project Work Type (I)</b></i> | <i><b>Project Type (I)</b></i> | <i><b>Control Group</b></i>              |

Other fields may be left at their default values.

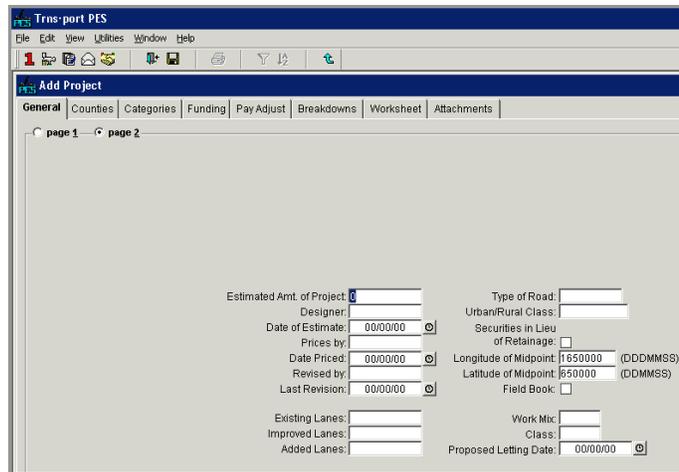
- Save the project by clicking the **Save**  Icon.

When page-1 is completed go to page-2.

- Click the page 2 radio button.

Three fields are required, but default values are provided.

- Estimated Amt of Project***
- Longitude of Midpoint***
- Latitude of Midpoint***



Default settings satisfy the system requirements for fields where blank values are not allowed, until values can be updated.

### Entering Project Detail from the Financial Management System (FM).

The FM Interface was created to both create and refresh financial and Work Program information in Trns•port PES. The refresh feature of the interface runs every night and updates fields in all projects in PES possessing valid FinProj Numbers. See the Trns•port PES Reference

Manual for Maintenance Projects for a full discussion on running the interface for new projects and to refresh projects.

To run the FM Interface program:

- Enter TSO and get to the ready prompt.
- Type **TSM** for production environment. Press **<Enter>**.
- Enter **B** at the Trns•port Interface screen. Press **<Enter>**.
- At the Add/Refresh screen
  - Enter one **FinProj** number per line.
    - For the first line, enter **A** (for SEL)
    - Enter **01** (for CARD ID)
    - Enter all 11 digits of the **FinProj Number**.
    - Press **<Enter>**.
  - To add another project,
    - Enter **A** (for SEL)
    - Enter **02** (for CARD ID)
    - Enter all 11 digits of the **FinProj Number**.
    - Press **<Enter>**.
- At the Job Card Information screen, enter a **printer ID, your name, and telephone number**. Press **<Enter>** for the next screen.
- At the Trns•port Interface screen, enter option **X** to end. Press **<Enter>**
- At the TSO screen enter **logoff** and press **<Enter>** and Exit TSO.
- A report will go to the printer you designated when the FM Interface has completed.

When the FM Interface completes, the projects will appear in the Projects List window. (If your Projects List window is open, you will have to refresh it by closing it and reopening it before your new project(s) will appear.) If the interface ran with no pre-existing data in PES, these new projects will contain an Access Control Group that is accessible to your district. If it ran as an update, the control group you entered will not be changed.

### **Adding and Changing Project Information**

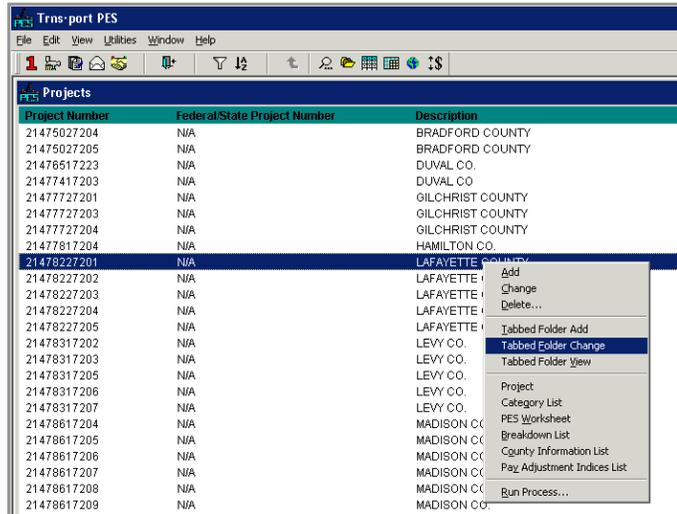
When the FM Interface completes, the projects will appear in the Projects List window. (If your Projects List window is open, you will have to refresh it by closing it and reopening it before

your new project(s) will appear.) If the interface ran with no pre-existing data in PES, these new projects will contain an Access Control Group that is accessible to your district. If it ran as an update, the control group you entered will not be changed.

To change information that comes from the FM system, contact your district work program office to make project information changes in FM, and the nightly refresh will make the Trns•port data match.

From the Projects List window,

- Rclick the desired **Project**.
- Click **Tabbed Folder Change**.

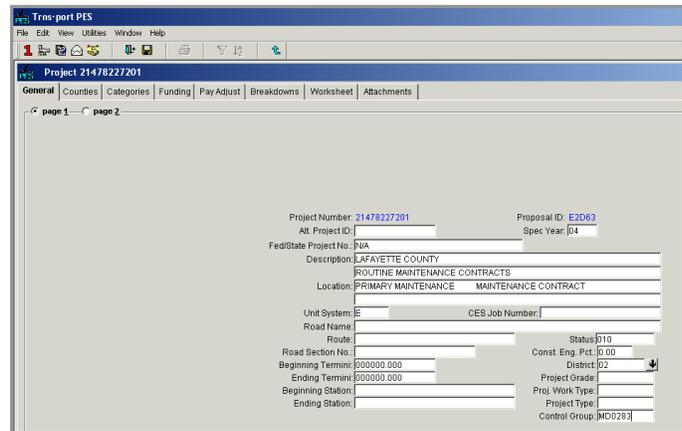


## General Tab

In this example the *Project Number* is blue and is the *FINPROJ* number from the FM system. The *Proposal Number* is also in blue. This particular project has status 010, Pre-construction Underway, from FM.

### General Tab page 1

The General Tab page 1 entry screens are seen here. See the discussion above with regard to required fields. Enter available information. Note the Control Group of MD0293. This Control Group indicates a



maintenance project under control of district 2. For a new project, the initial Control Group will be of the form MD0?, where the ? will be replaced by the Managing District number. The FM system will make that initial assignment. Someone with proper authority, in the district office, must change this Control Group to assign the project to a particular person or group.

## General Tab page 2

The following fields are filled by Trns•port or the FM System.

*Estimated Amt of Project*

*Type of Road*

*Work Mix*

*Longitude of Midpoint*

*Latitude of Midpoint*

*Proposed Letting Date*

- ❖ **Note:** The *Estimated Amt of Project* field is filled when you run the process **Generate Preliminary Detailed Estimate**. This process will be run several times over the project life. It must be run after the final **Engineers Estimate** for historical purposes. When the contract transfers to SiteManager and DSS this field transfers as the **Engineers Estimate**.

## Counties Tab

The Counties Tab contains the *County Number* and the County Name of the counties to which the project is associated. County Wide, Turnpike, and Statewide are valid entries.

County or Cong. Dist Code	County Name	Percent of Project Length
33	LAFAYETTE	100.00

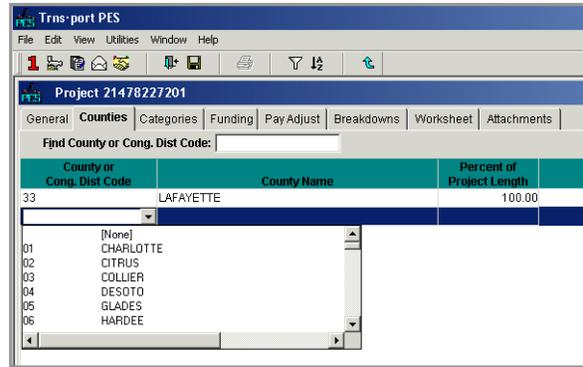
This example shows that 100% of the project will be in County 33, Lafayette County. If a project is in more than one county, and that information is in the FM system, the proportioned information will appear in this table.

If another county needs to be added,

- Rclick anywhere in the white space of the screen.
- Click **Add**.

Be sure that County information is accurate in the Work Program. Required corrections must be done by the District Work Program Office. The Work Program/FM data will overwrite information that is manually entered in this tab.

The screen will appear as seen here, with one blank row added and ready for data. Add any additional rows to the window so that there are as many rows as there are counties associated with the project.



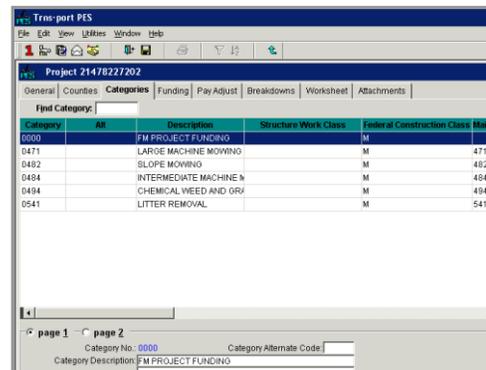
**County or Congressional District** From the list box in the field, select the county to be added. Once a county is selected, the county number will be displayed and the county name will appear in the adjacent field. Do this for each row of data.

**County Name** The county name will be entered automatically after selecting the county number.

**Percent of Project Length** If there is only one county involved in the project, enter 100%. If multiple counties are involved, enter percentages for each that will total 100%.

## Categories Tab

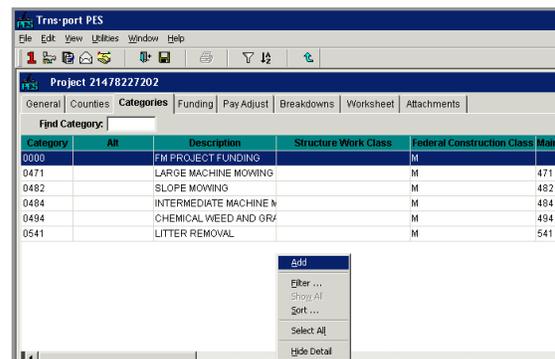
This tab must include Category headers for each category (Maintenance Activity) the project is to include. In this example in addition to Category 0000 for funding, there are five other categories.



## Add a Category

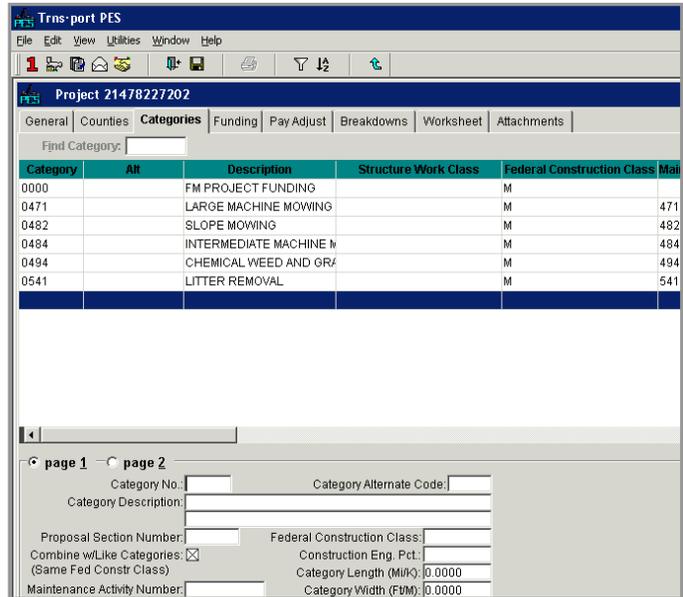
To add a Category,

- Rclick in the center white space.
- Click **Add**.



There will be a blank row in the center section of the screen and a detail area at the bottom.

- Enter the *Category Number* as a **Maintenance Activity Number** preceded by a "0" (zero).
- Use the list box at the *Maintenance Activity Number* field to select Maintenance Activity (MA) Number and Descriptions.



### Categories Tab page 1

- Complete the following fields for each category:

**Category Number** Create all Categories the project requires. Enter each category number as above. Category numbers will be the three-digit MA number preceded by "0".

**Category Description** Enter the description from the Maintenance Activity Number description.

**Combine w/Like Categories** The default value for this flag is **YES**. **Do not change it.**

**Federal Construction Class** Choose **M** from the list box.

**Maintenance Activity Number** Use the appropriate Maintenance Activity Number in the list box.

**Category Length** You may assign the full length of the project in any category, or you may split the length among categories so that the combined length is equal to the overall project length. Enter miles or kilometers. The default value is 0.0000.

**Category Width** The width of this portion of the project in feet or meters. The default value is 0.0000.

**Bridge ID, Bridge type, No Spans, Bridge Length, and Bridge Width** – are all procedurally required for a Structure Category.

## Categories Tab page 2

When page 1 is complete,

- Click the page 2 radio button to display the remaining fields.

Certain information contained on the general page may be repeated here (e.g., termini, stationing, and section number). It is not required that all categories reflect the same overall information.

**Unit Number** Not in use at this time. The default value is 000. **Do not change this value.**

The screenshot shows the 'Transport PES' software interface. The title bar indicates 'Project 21478227202'. The 'Categories' tab is active, displaying a table with the following data:

Category	Alt	Description	Structure Work Class	Federal Constr
0000		FM PROJECT FUNDING		M
0471		LARGE MACHINE MOWING		M
0482		SLOPE MOWING		M
0484		INTERMEDIATE MACHINE M		M
0494		CHEMICAL WEED AND GRA		M
0541		LITTER REMOVAL		M
0543		ROAD SWEEPING MECHAN		M

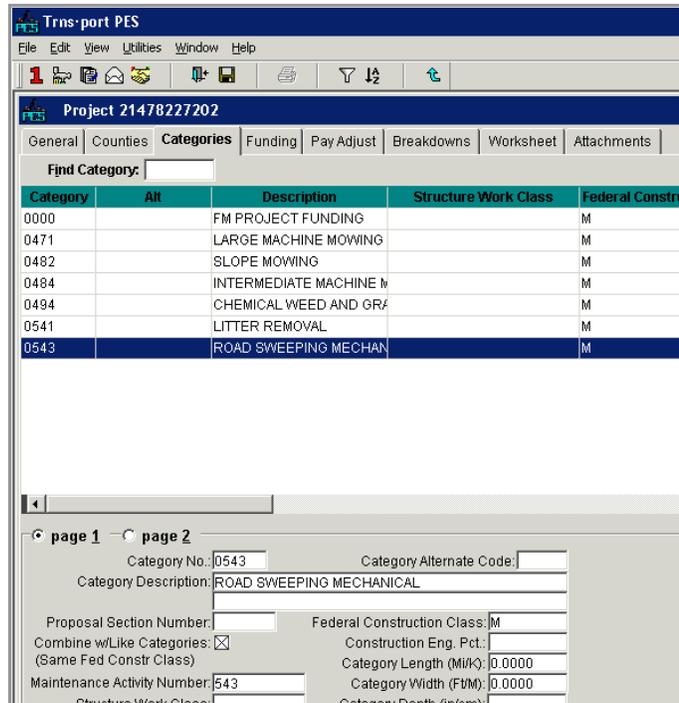
Below the table, the 'page 2' radio button is selected. The input fields are as follows:

- Highway Type: [Dropdown]
- Road Section Number: [Text Box]
- Highway Number: [Text Box]
- Unit Number: 000
- Beginning Termini: [Text Box]
- Unit Description: [Text Box]
- Ending Termini: [Text Box]
- Adjustment Code: [Text Box]
- Beginning Station: [Text Box]
- Adj. %: 0.00
- Ending Station: [Text Box]
- Bridge Designer: [Text Box]
- Super Structure Type: [Dropdown]
- Sub Structure Type: [Dropdown]

Alternatively, you may enter category numbers and titles by using the Copy Special function.

When category information is complete,

- Click **ADD MORE** to enter information for another category.
- Click **OK** to finish adding category information.
- Click **CANCEL** to return to the Categories List window without saving the new record.

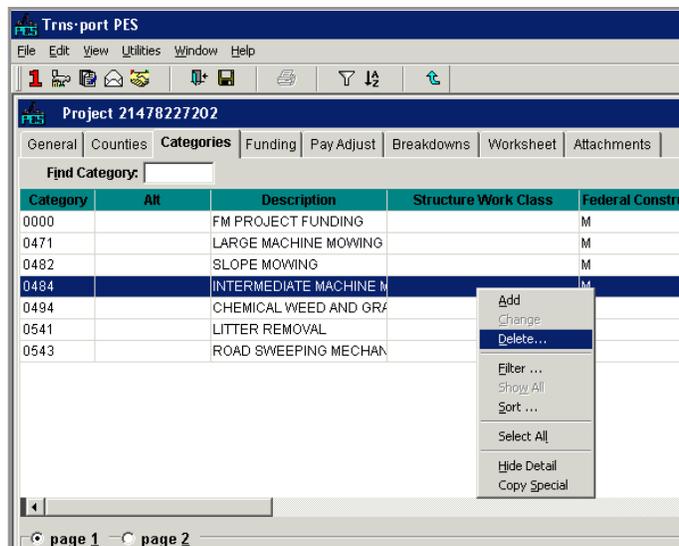


### Delete a Category

To delete a category,

- Rclick the **Category**.
- Click **Delete**.

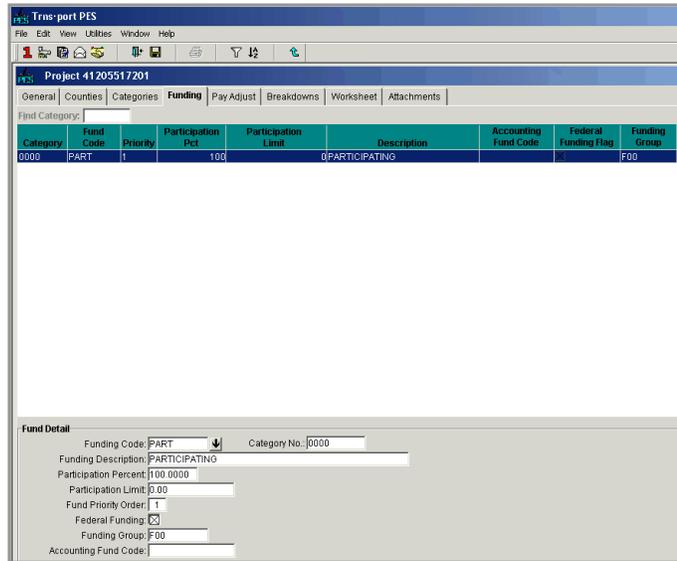
The category will be removed from the screen and from the Trns•port database when the project is saved. Continue deleting categories that are not required. **You may keep "empty" categories in the database while you are creating a project, but you will not be able to run all reports and processes with these "empty" categories.** Prior to processing a proposal, delete all unneeded categories.



## Funding Tab

Trns•port carries no specific funding data for projects or proposals. The terms “Participating” or “PART” when used in Trns•port are to mean that the project or the individual pay items participate in the funding to be ultimately associated to the project.

There is no information to be completed on the funding tab. All data is created in the Financial Management System (FM) and populates this tab. **Do not change any values on this tab.**



## Pay Adjust Tab

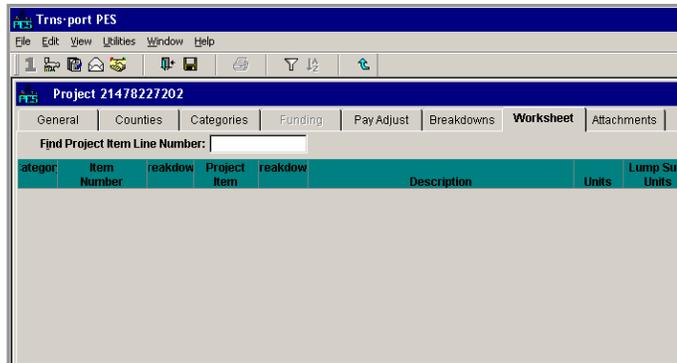
The payment adjustment features of Trns•port are not in use at this time.

## Breakdowns Tab

The Breakdowns Tab is not used for maintenance projects. A default value of "1" and "Worksheet Breakdown Default" should appear automatically. If it does not appear, enter a "1" in this field on the Worksheet.

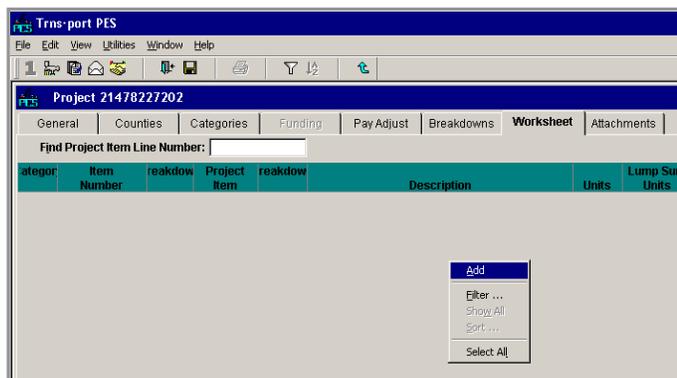
## The Worksheet Tab

The FM system has no Item data. Most of your work will be in this tab, entering Items and quantities. As can be seen, there is only gray space where Item information is to reside. Begin by entering blank rows to hold the Item data.



In the blank Worksheet Tab,

- Rclick
- select **Add**.



This will create one blank row.

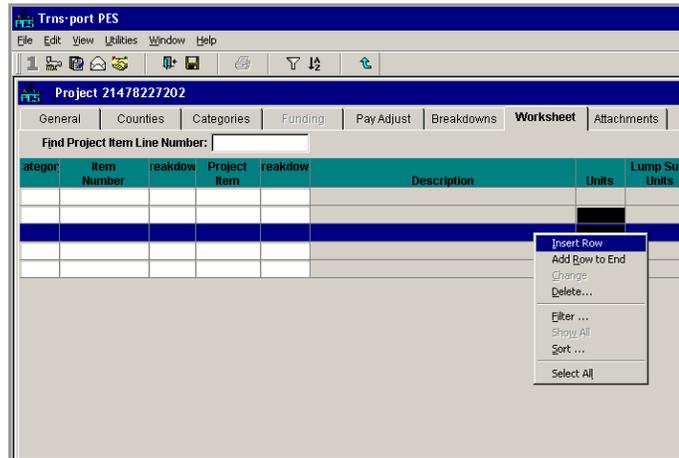
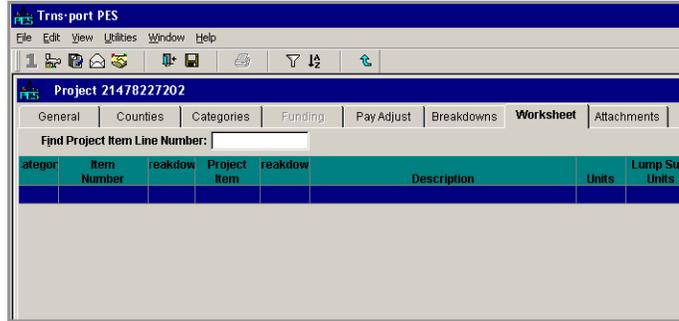
You may add one row and enter the associated Item data, or you may choose to enter a group of blank rows:

To enter a second row,

- Place your cursor on one of the rows.
- Rclick and select **Insert Row**.

See the Reference Manual for Maintenance Projects for more information on adding rows.

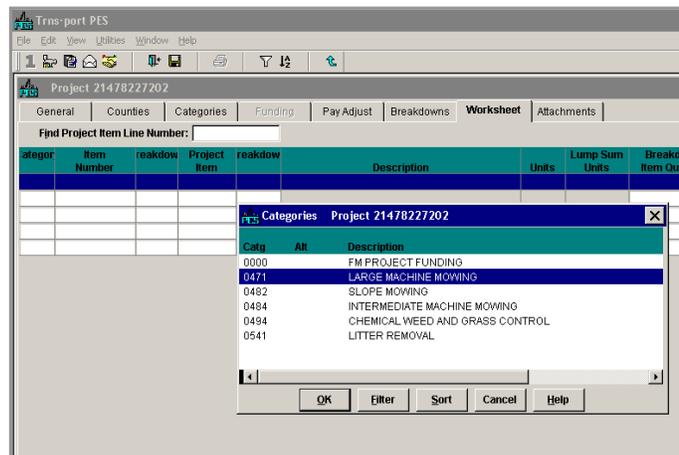
Repeat this until you have the number of rows you want. The Worksheet contains data in columns and rows and functions like a standard spreadsheet. Each row will present the data associated with one Item.



### Adding Information to the Worksheet

To enter information to the Worksheet, you click in a row and enter values for each column in the row. When you open an empty Worksheet, you need to insert a row before working in the Worksheet, as discussed previously. You can add or change data in most blank column fields (except those fields calculated by Trns•port or fields with blue data). You cannot change blue field values nor can you enter values into columns that are "grayed out". To alter values in these columns you will do it through the Item Detail window.

Some columns, such as Category Number and Item Number, have list boxes at the bottom of the column. Click the arrow to view supporting reference data and select appropriate values. Filter and sort data to find the information needed. If a column does not have an arrow displayed at the bottom, enter values directly into the fields.



Enter information for required fields.

Begin entering Item data by:

- Selecting the *Category Number* to which the Item belongs. Choose from the list box at the bottom of the screen in the Category Number column.

The Worksheet contains 29 fields displayed as columns. The following are required:

- Complete the following fields for each category **as appropriate**:

*Breakdown ID*

*Breakdown Item Line Number*

*Breakdown Item Quantity*

*Category Number*

*Combine Flag*

*Estimated Unit Price*

*Fixed Price (Pre-Established Price)*

*Item Number*

*Item Alternate (Alt Code)*

*Price Lock Flag*

*Project Item Line Number*

*Do Not Bid*

*Non Par Fund Code*

The Department does not manage funds in Trns•port and this field is therefore set to default to a blank. **Do not change this field during project development.** In rare cases it will be necessary to mark some items as nonparticipating **after** the proposal has been reviewed by the FHWA. For state funded projects no items are to be flagged as Non Participating.

### Editing the Project Worksheet

Once a project has been created in Trns•port PES, the FM system will automatically update financial information for each project so that data will stay synchronized. This automatic refresh requires no action on your part; it is done routinely every night as a system batch process. If you need it at other times, you may call the procedure yourself.

### Special Treatment of Performance Contract Lump Sum Pay Items

Performance contracts are established with a series of lump sum payments, which are based on varying percentages of the total original contract amount per the Payment Schedule in the Advertised Project's Scope. To establish these contracts for varying lump sum payments, multiple periodic payments of lump sum pay items need to be created. Lump Sum Items are typically flagged as Combine = Y-Yes. **However, when using the "Periodic Payments of Lump Sum" pay item, set the "Combine Like Items" Flag to "N"- No.**

**Example for this exception:**

Project Item Line Number	Category Number	Item Alt Code	Item Number	Description	Units	Lump Sum	Estimated Quantity	Breakdown Item Quantity	Estimated Unit Price	Extended Amount	Pre-Established Price	Combine Like Items Flag	Net
0030	0099		E099 2	PERIODIC PAYMENTS OF LUMP SUM	EA		2.000	2.000	107,600.00000	215,200.00000	N	N	N
0020	0099		E099 2	PERIODIC PAYMENTS OF LUMP SUM	EA		6.000	6.000	75,320.00000	451,920.00000	N	N	N
0010	0099		E099 2	PERIODIC PAYMENTS OF LUMP SUM	EA		20.000	20.000	90,384.00000	1,807,680.00000	N	N	N
0015	0099		E099 2	PERIODIC PAYMENTS OF LUMP SUM	EA		12.000	12.000	96,840.00000	1,162,080.00000	N	N	N
0005	0099		E099 2	PERIODIC PAYMENTS OF LUMP SUM	EA		40.000	40.000	89,308.00000	3,572,320.00000	N	N	N
0025	0099		E099 2	PERIODIC PAYMENTS OF LUMP SUM	EA		4.000	4.000	80,700.00000	322,800.00000	N	N	N

The system is typically set up to combine identical items however in the instance of the “Periodic Payment Of Lump Sum” pay items the System needs to be flagged to override the function. This is important in order to maintain the separate listing of the “Periodic Payments Of Lump Sum” pay items when the Project is attached to the Proposal.

This is important to provide for the intended Payment Schedule when the contract is transferred to Site Manager after award.

After setting the combine flag to no, enter the various quantities per the Payment Schedule in the Advertised Project’s Scope and estimated prices, sort the items by quantity, and assign the line items manually to retain the order.

The basis for the Estimated Unit Price line items dollar amounts should be the advertised Budget Amount.

Please refer to the Trans\*port LAS User Guide for Special Maintenance Projects for the steps to be followed in LAS for these Contracts.

**Entering Data in a Range of Cells**

Use the **Edit > Range Fill** command from the Menu Bar to enter values in columns. If you add or change information in a column and other rows in the same column should contain the same value, you can select all cells in the column and copy the value down or up in the column.

To select an entire column,

- Click once in the column title.
  - Click **Edit > Range Fill > Fill Up**.
- Or
- Click **Edit > Range Fill > Fill Down** from the Menu Bar.

Trns•port populates all the selected fields with the value from the first cell.

Item Description	Item Units
CONC CLASS (MISCELLANEOUS)	CY
FENCE CORNER POST ASSEM (TYPE A)	EA
FENCE CORNER POST ASSEM (TYPE B)	EA
FENCE PULL & END POST ASSEM (TYPE A)	EA
FENCE PULL POST ASSEMBLY (TYPE B) (STD)	EA
FENCE END POST ASSEMBLY (TYPE B) (STD)	EA
FENCE (RESET EXIST)(TYPE A)	LF
FENCE (RESET EXIST)(TYPE B)	LF
FENCE GATE (TYP B)(SGL 5')(5' OPENING)	EA
FENCE GATE (TYP B)(SGL 10')(10' OPENING)	EA
FENCE GATE (TYP B)(DBL 10')(20' OPENING)	EA
FENCE GATE (SLIDING) (CANTILEVER 12)	EA
FENCE POST BRACE (TYPE A, 4)	EA
FENCE POST LINE (TYPE A, 4)	EA
FENCE POST APPROACH (TYPE A, 4)	EA
FENCE POST PULL (TYPE A, 4)	EA
FENCE POST BRACE (TYPE B, 6)	EA
FENCE POST LINE (TYPE B, 6)	EA
FENCE MAINT (TYP A) (4) (BARBED WIRE)	LF
FENCE MAINT (TYP A) (4) (FENCE FABRIC)	LF
FENCE MAINT (TYP B) (6) (BARBED WIRE)	LF
FENCE MAINT (TYP B) (6) (FENCE FABRIC)	LF

## Assigning Line Numbers

You can manually enter Project Item or Breakdown Item Line Numbers or let Trns•port enter them automatically. You must assign line numbers to all rows before saving the Worksheet. To enter Line Numbers:

- Select **Edit > Assign Line Numbers > Project Items** from the Menu Bar.
- Select **Edit > Assign Line Numbers > Breakdown Items** from the Menu Bar.

These actions sequentially number all Project and Breakdown Item Sequence numbers.

reakdown	Item Description	Item Units
1	CONC CLASS (MISCELLANEOUS)	CY
1	FENCE CORNER POST ASSEM (TYPE A)	EA
1	FENCE CORNER POST ASSEM (TYPE B)	EA
1	FENCE PULL & END POST ASSEM (TYPE A)	EA
1	FENCE PULL & END POST ASSEM (TYPE B) (STD)	EA
1	FENCE (RESET EXIST)(TYPE A)	LF
1	FENCE (RESET EXIST)(TYPE B)	LF
1	FENCE GATE (TYP B)(SGL 5')(5' OPENING)	EA
1	FENCE GATE (TYP B)(SGL 10')(10' OPENING)	EA
1	FENCE GATE (TYP B)(DBL 10')(20' OPENING)	EA
1	FENCE GATE (SLIDING) (CANTILEVER 12)	EA
1	FENCE POST BRACE (TYPE A, 4)	EA
1	FENCE POST LINE (TYPE A, 4)	EA
1	FENCE POST APPROACH (TYPE A, 4)	EA
1	FENCE POST PULL (TYPE A, 4)	EA
1	FENCE POST BRACE (TYPE B, 6)	EA
1	FENCE POST LINE (TYPE B, 6)	EA
1	FENCE MAINT (TYP A) (4) (BARBED WIRE)	LF
1	FENCE MAINT (TYP A) (4) (FENCE FABRIC)	LF

## Checking Data Consistency

Check the consistency of data in the Worksheet before you save it. To do this:

- Select **Edit > Consistency Checking** from the Menu Bar.

This checks secondary fields for Items that have identical category number and project Item line numbers.

If errors are found, the cursor will be placed in one of the erroneous fields. Additionally, when closing the window, it will go through this check again to avoid saving bad data. Correct each error.

reakdown	Item Description	Item Units	Seq
1	CONC CLASS (MISCELLANEOUS)	CY	
1	FENCE CORNER POST ASSEM (TYPE A)	EA	
1	FENCE CORNER POST ASSEM (TYPE B)	EA	
1	FENCE PULL & END POST ASSEM (TYPE A)	EA	
1	FENCE PULL & END POST ASSEM (TYPE B) (STD)	EA	
1	FENCE END POST ASSEMBLY (TYP B) (STD)	EA	
1	FENCE (RESET EXIST)(TYPE A)	LF	
1	FENCE (RESET EXIST)(TYPE B)	LF	
1	FENCE GATE (TYP B)(SGL 5')(5' OPENING)	EA	
1	FENCE GATE (TYP B)(SGL 10')(10' OPENING)	EA	
1	FENCE GATE (TYP B)(DBL 10')(20' OPENING)	EA	
1	FENCE GATE (SLIDING) (CANTILEVER 12)	EA	
1	FENCE POST BRACE (TYPE A, 4)	EA	
1	FENCE POST LINE (TYPE A, 4)	EA	
1	FENCE POST APPROACH (TYPE A, 4)	EA	
1	FENCE POST PULL (TYPE A, 4)	EA	
1	FENCE POST BRACE (TYPE B, 6)	EA	
1	FENCE POST LINE (TYPE B, 6)	EA	
1	FENCE MAINT (TYP A) (4) (BARBED WIRE)	LF	
1	FENCE MAINT (TYP A) (4) (FENCE FABRIC)	LF	
1	FENCE MAINT (TYP B) (6) (BARBED WIRE)	LF	

## Identifying Obsolete Items

One of the tests made during the Consistency check is for obsolete Items. If any are found, you will be required to change the Items to current values before the project will successfully save.

This situation may occur when you are using an old project or a template project to create a new project by means of the Copy Special features. The copy special will create the new project, but the consistency check feature will be implemented when you try to save the project.

When completed, your Worksheet will be similar to this one. Save the new project to the Trns•port database by clicking the "X" to close the window, Click the **Save** icon on the button bar, or select **File > Save** from the Menu Bar.

ategor	Item Number	reakdow	Project Item	reakdow	Item Description	Item Units
0527	0400 1 15	0001	0005	1	CONC CLASS (MISCELLANEOUS)	CY
0527	0550 3 1	0002	0010	1	FENCE CORNER POST ASSEM (TYPE A)	EA
0527	0550 3 2	0003	0015	1	FENCE CORNER POST ASSEM (TYPE B)	EA
0527	0550 4 1	0004	0020	1	FENCE PULL & END POST ASSEM (TYPE A)	EA
0527	0550 5 1	0005	0025	1	FENCE PULL POST ASSEMBLY (TYP B) (STD)	EA
0527	0550 6 1	0006	0030	1	FENCE END POST ASSEMBLY (TYP B) (STD)	EA
0527	0550 74 1	0007	0035	1	FENCE (RESET EXIST)(TYPE A)	LF
0527	0550 74 2	0008	0040	1	FENCE (RESET EXIST)(TYPE B)	LF
0527	0550 76 51	0009	0045	1	FENCE GATE (TYP B)(SGL 5')(5' OPENING)	EA
0527	0550 76101	0010	0050	1	FENCE GATE (TYP B)(SGL 10')(10' OPENING)	EA
0527	0550 76202	0011	0055	1	FENCE GATE (TYP B)(DBL 10')(20' OPENING)	EA
0527	0550 79 12	0012	0060	1	FENCE GATE (SLIDING) (CANTILEVER 12)	EA
0527	E550 6111	0013	0065	1	FENCE POST BRACE (TYPE A, 4)	EA
0527	E550 6112	0014	0070	1	FENCE POST LINE (TYPE A, 4)	EA
0527	E550 6113	0015	0075	1	FENCE POST APPROACH (TYPE A, 4)	EA
0527	E550 6114	0016	0080	1	FENCE POST PULL (TYPE A, 4)	EA
0527	E550 6221	0017	0085	1	FENCE POST BRACE (TYPE B, 6)	EA
0527	E550 6222	0018	0090	1	FENCE POST LINE (TYPE B, 6)	EA
0527	E550 7111	0019	0095	1	FENCE MAINT (TYP A) (4) (BARBED WIRE)	LF

### The Attachments Tab

All of the Trns•port tabbed folder windows have an Attachments tab. It allows you to integrate OLE-compatible documents (for example, letters or spreadsheets), web pages, and plug-in applications into Trns•port. At this time there are no standards established for use of this feature.

### Deleting a Project

To delete a project,

- Highlight the project in the Projects List window
- Select **Delete** from the right mouse button menu.

Trns•port displays a series of two Delete Warning windows and a Confirm Delete window. Authority to delete projects is restricted by security controls. If you are not able to delete a project, see your District Application Manager.

Project Number	Federal/State Project Number	Description
40561125201	N/A	COUNTYWIDE
40561135201	N/A	MIAMI-DADE COUNTYWIDE
40561145201	N/A	MIAMI-DADE COUNTYWIDE
40561155201	N/A	MIAMI-DADE COUNTYWIDE
40561325201	N/A	DW BRIDGE REPAIR
40561332501	N/A	DISTRWIDE BRIDGE REPAIR 02/03
40561335201	N/A	DISTRICTWIDE BRIDGE
40561425201	N/A	DISTRICTWIDE
40561435201	N/A	DISTRICTWIDE
40561445201	N/A	DISTRICTWIDE
40566625201	N/A	DISTRICTWIDE
40566635201	N/A	DISTRICTWIDE
40566645201	N/A	DISTRICTWIDE
40571017202	N/A	FENCE REPAIRS DW
40571117202	N/A	FENCE REPAIRS DW
40573617201	N/A	I-95/ SWEEPING
40573627201	N/A	I-95/SWEEPING
40573717202	N/A	DISTRICT WIDE
40573727201	N/A	DISTRICTWIDE
40561517202	N/A	INTERSTATE- PALM
40561617202	N/A	PRIMARY - PALM BEACH
40563617201	N/A	BROWARD COUNTY
40563717201	N/A	BROWARD COUNTY
40617517202	N/A	MOWING & LITTER RE-
40626717202	N/A	BROWARD COUNTY
40626727201	N/A	BROWARD COUNTY
40626917202	N/A	US-27 MOWING
40634917202	N/A	PALM BEACH COUNTY
40635017202	N/A	PALM BEACH COUNTY

### The Item Detail Screen

There will be instances when it is either desirable or necessary to enter some Item information into the Item Detail Window. See the Reference Manual for Maintenance Projects for details on this process.

Before using this procedure, be sure that you have properly saved your project in the Folders formats to the database and exited the project.

To access the Item Detail screen, take the following steps:

From the Projects List window,

- Rclick the project of interest.
- Click **Category List**.
- Click the category of interest.
- Rclick **Project Items List**.
- Click the *Item* of interest.
- Rclick **Change**.

The Item Detail window will open. You may change any field on the screen except those that are in blue. When you have completed your changes,

- Click **OK** to save the data and close the screen.
- Close the Item list window.
- Close the Category list window.

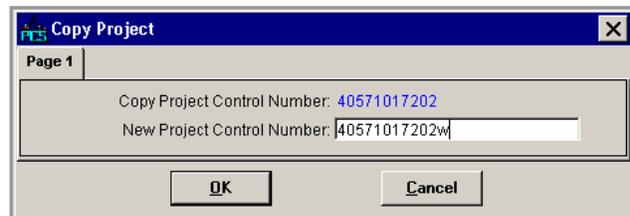
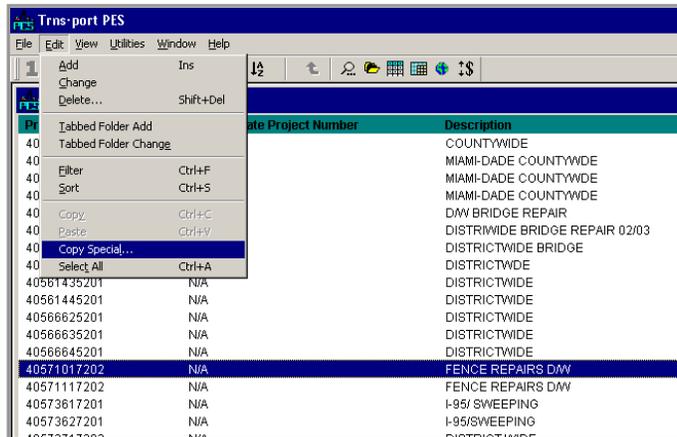
## The Copy Special Feature

The Copy Special feature allows you to copy one project to another or to copy the category detail of one project to another project.

### Duplicating a Project

To initiate a Copy Special for a project:

- Click the **project** to copy in the Project List window.
- Click **Edit > Copy Special** from the Menu Bar.
- Enter the new *Project Control Number*
- Click **OK**.



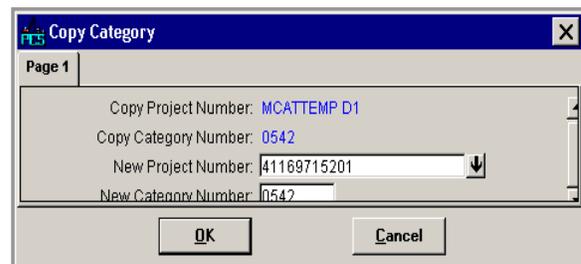
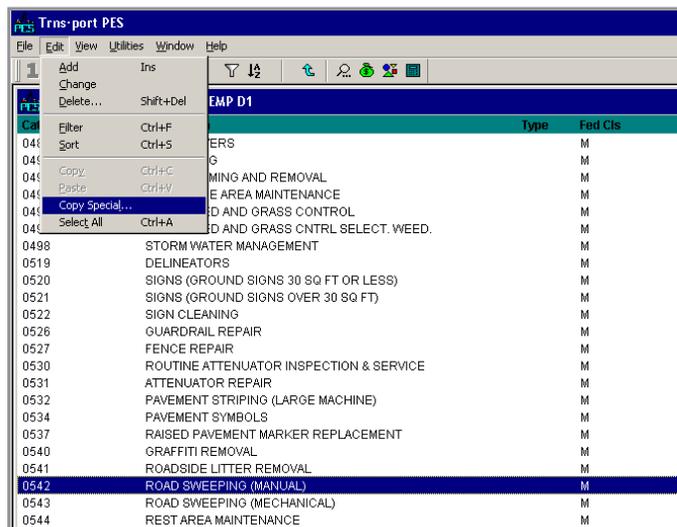
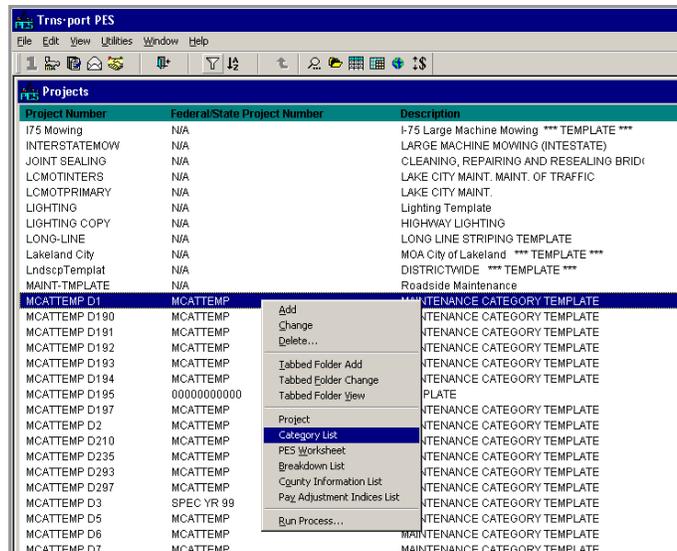
## Duplicating a Category

The Copy Special option also allows you to copy a category and its Item information from one project to another, eliminating the need to re-enter all the data for each new category.

- Click the source **project** in the Projects List window.
- Rclick **Category List**.
- Click the category you wish to copy.
- From the Menu Bar, click **Edit > Copy Special**.

The system will default to the same Project Number. This would apply if you had created a Category and wished to duplicate it in the same project.

- Click the **New Project Number** from the list box.
- Enter the source Category Number as the **New Category Number** to copy the Maintenance Activity detail to the new project.



After you copy the category, make necessary modifications to the new category. Copy Special copies the category header, Item records, quantities, and price information that exist in the source category.

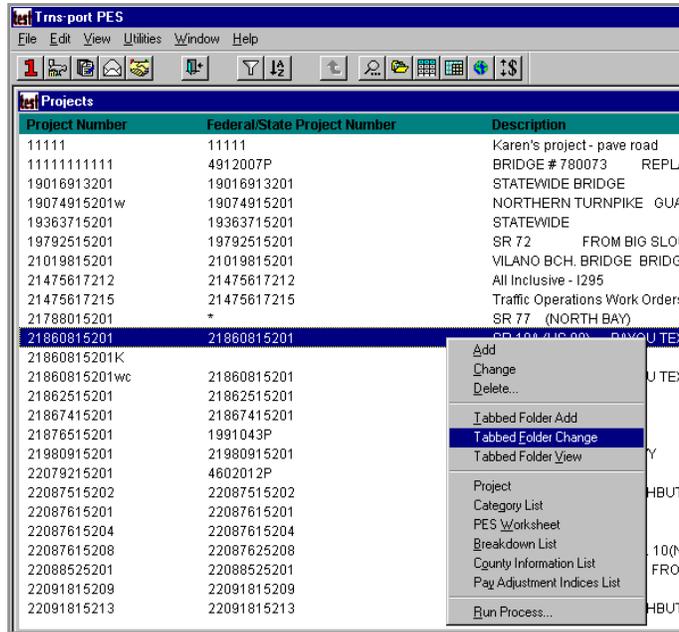
## Combining Projects

To combine two or more projects do the following:

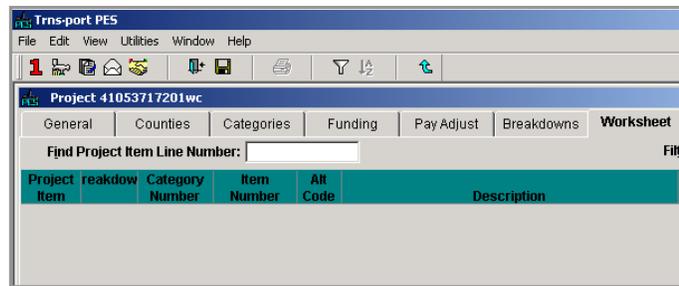
- Click the host project in the Projects List window.

Trns•port will keep the header from this project, then add categories, and Items from other projects to it.

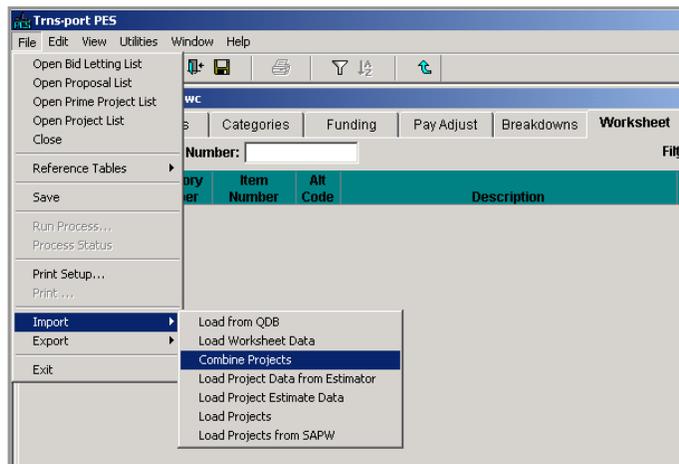
- Click **Tabbed Folder Change** to open the project.
- Click the **Worksheet Tab** to open the Worksheet for the selected project



In this case, there are no rows of Items displayed. A view of the Category tab of this project would reveal that all necessary Category Numbers exist.

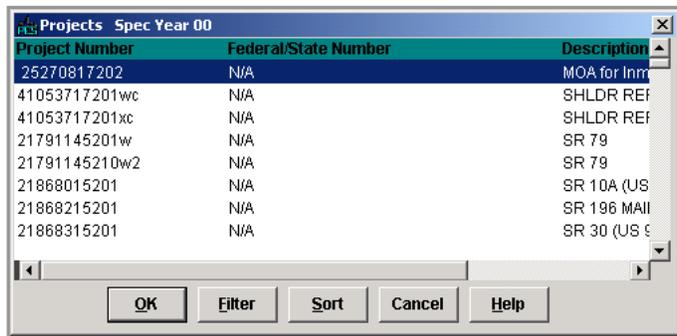


- From, the Menu Bar, Click **File > Import > Combine Projects**.



Trns•port displays a list of projects. Use the Filter and Sort options to help you locate projects to combine. You must combine projects where all of them have the same *Spec year* and same Unit System.

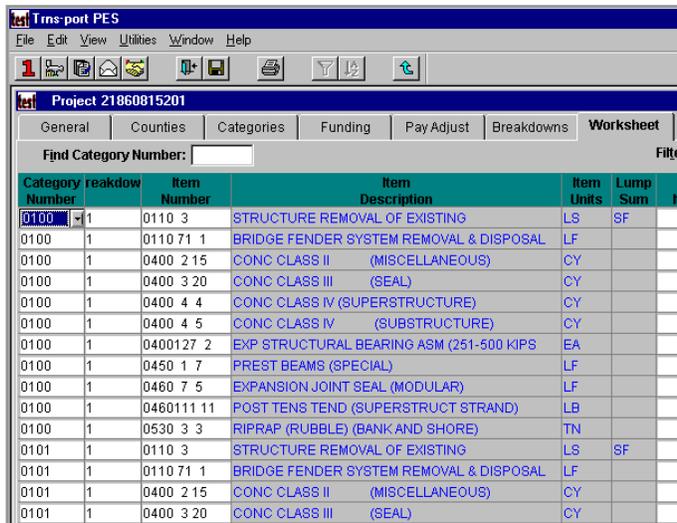
- Click a project to combine
- Click **OK**.



Trns•port returns you to the Worksheet where it loads data from the selected project into the open Worksheet.

If you want to combine an additional project, repeat the steps above for each one.

When all projects have been combined, rerun the Assign Line Numbers process for both Project Line Numbers and Breakdown Line Numbers.



## Creating a Template Project

A template project is a real project under another name. You can create a template by taking a project that is available on your Projects List window and using the Copy Special features described above to copy all of the old information into a new project with a new name.

Alternatively, you may begin by creating a template without reference to any existing Trns•port PES project.

The management of templates can be either in the District Office or in the Maintenance Yards. Keeping in mind the hierarchy of the Access Control Group, a project created in a District Office will only be available to users with personal Control Groups that can access District Office lists.

There are two cautions regarding the use of templates.

- The Project Control Number (PCN) given to a template should not look like a Financial Project Control number in order to avoid any confusion with a real project. The PCN field has 13 characters available and an appropriate use of letters and numbers should be used.
- Templates should have no funds assigned to them, so that no erroneous funding information can be printed on project reports.

## Creating and Managing Proposals

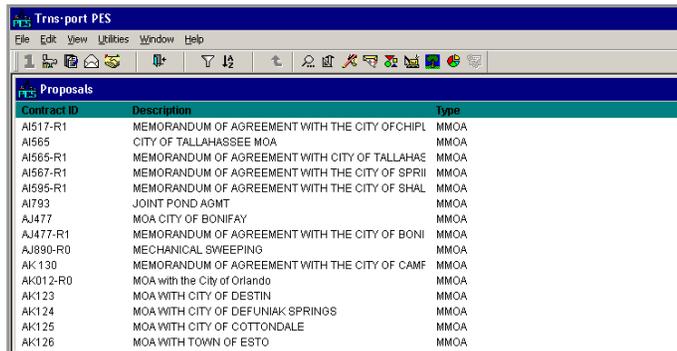
To create a proposal, you do not have to define all the proposal details, just the proposal header information. Tell Trns•port which projects are to be assigned to the proposal, and allow Trns•port to create the proposal details. After you create the proposal, assign it to a bid letting and produce the proposal documents.

## Working with Proposals

To define a Proposal Header, open the Proposals List window,

- Click the **Proposal**  icon.

Add, change, or delete proposal records from this list window.



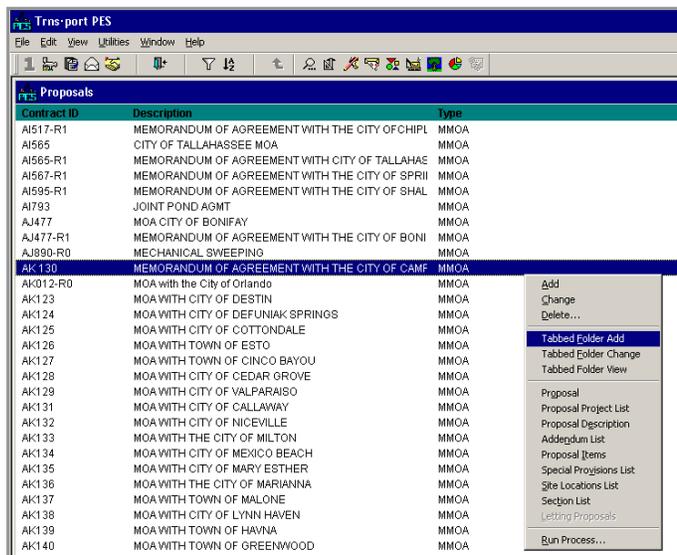
Contract ID	Description	Type
AI517-R1	MEMORANDUM OF AGREEMENT WITH THE CITY OF CHIPL	MMOA
AI565	CITY OF TALLAHASSEE MOA	MMOA
AI565-R1	MEMORANDUM OF AGREEMENT WITH CITY OF TALLAHAE	MMOA
AI567-R1	MEMORANDUM OF AGREEMENT WITH THE CITY OF SPRUI	MMOA
AI595-R1	MEMORANDUM OF AGREEMENT WITH THE CITY OF SHAL	MMOA
AI793	JOINT POND AGMT	MMOA
AJ477	MOA CITY OF BONIFAY	MMOA
AJ477-R1	MEMORANDUM OF AGREEMENT WITH THE CITY OF BONI	MMOA
AJ890-R0	MECHANICAL SWEEPING	MMOA
AK 130	MEMORANDUM OF AGREEMENT WITH THE CITY OF CAMF	MMOA
AK012-R0	MOA with the City of Orlando	MMOA
AK123	MOA WITH CITY OF DESTIN	MMOA
AK124	MOA WITH CITY OF DEFUNIAK SPRINGS	MMOA
AK125	MOA WITH CITY OF COTTONDALE	MMOA
AK126	MOA WITH TOWN OF ESTO	MMOA

## Creating a Proposal

To create a new proposal,

- Rclick **Tabbed Folder Add**.

Trns•port displays the first page of the General Tab.



Contract ID	Description	Type
AI517-R1	MEMORANDUM OF AGREEMENT WITH THE CITY OF CHIPL	MMOA
AI565	CITY OF TALLAHASSEE MOA	MMOA
AI565-R1	MEMORANDUM OF AGREEMENT WITH CITY OF TALLAHAE	MMOA
AI567-R1	MEMORANDUM OF AGREEMENT WITH THE CITY OF SPRUI	MMOA
AI595-R1	MEMORANDUM OF AGREEMENT WITH THE CITY OF SHAL	MMOA
AI793	JOINT POND AGMT	MMOA
AJ477	MOA CITY OF BONIFAY	MMOA
AJ477-R1	MEMORANDUM OF AGREEMENT WITH THE CITY OF BONI	MMOA
AJ890-R0	MECHANICAL SWEEPING	MMOA
<b>AK 130</b>	<b>MEMORANDUM OF AGREEMENT WITH THE CITY OF CAMF</b>	<b>MMOA</b>
AK012-R0	MOA with the City of Orlando	MMOA
AK123	MOA WITH CITY OF DESTIN	MMOA
AK124	MOA WITH CITY OF DEFUNIAK SPRINGS	MMOA
AK125	MOA WITH CITY OF COTTONDALE	MMOA
AK126	MOA WITH TOWN OF ESTO	MMOA
AK127	MOA WITH TOWN OF CINCO BAYOU	MMOA
AK128	MOA WITH CITY OF CEDAR GROVE	MMOA
AK129	MOA WITH CITY OF VALPARAISO	MMOA
AK131	MOA WITH CITY OF CALLAWAY	MMOA
AK132	MOA WITH CITY OF NICEVILLE	MMOA
AK133	MOA WITH THE CITY OF MILTON	MMOA
AK134	MOA WITH CITY OF MEXICO BEACH	MMOA
AK135	MOA WITH CITY OF MARY ESTHER	MMOA
AK136	MOA WITH THE CITY OF MARIANNA	MMOA
AK137	MOA WITH TOWN OF MALONE	MMOA
AK138	MOA WITH CITY OF LYNN HAVEN	MMOA
AK139	MOA WITH TOWN OF HAINA	MMOA
AK140	MOA WITH TOWN OF GREENWOOD	MMOA

Add  
 Change  
 Delete...  
**Tabbed Folder Add**  
 Tabbed Folder Change  
 Tabbed Folder View  
 Proposal  
 Proposal Project List  
 Proposal Description  
 Addendum List  
 Proposal Items  
 Special Provisions List  
 Site Locations List  
 Section List  
 Letting Proposals  
 Run Process...

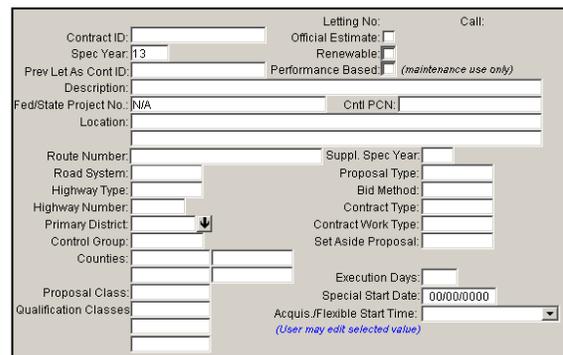
## The General Tab

The General Tab contains two pages.

### General Tab page 1

Begin by entering the lead **Project Number** in the **Cntl PCN** field. This will save the necessity of re-entering information.

- Click **Cntl PCN**.



Contract ID:  Letting No:  Call:

Spec Year: 13 Official Estimate:  Renewable:

Prev Let As Cont ID:  Performance Based:  (maintenance use only)

Description:

Fed/State Project No.: N/A Cntl PCN:

Location:

Route Number:  Suppl. Spec Year:

Road System:  Proposal Type:

Highway Type:  Bid Method:

Highway Number:  Contract Type:

Primary District:  Contract Work Type:

Control Group:  Set Aside Proposal:

Countries:

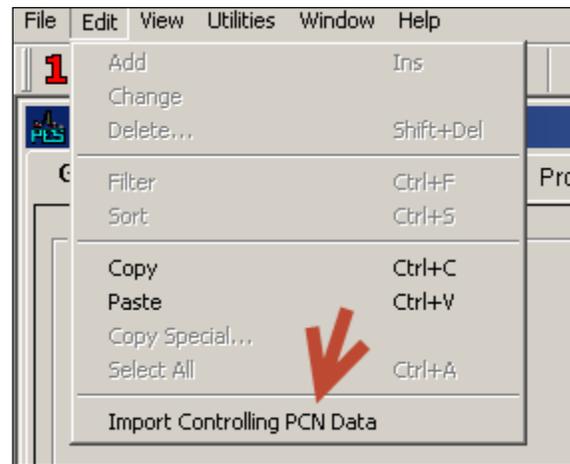
Execution Days:

Proposal Class:  Special Start Date: 00/00/0000

Qualification Classes:  Acquis./Flexible Start Time:

(User may edit selected value)

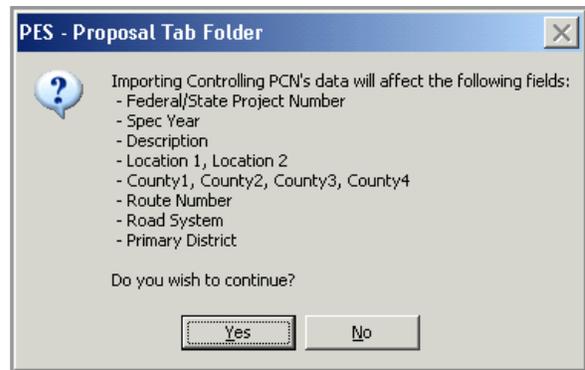
- Click the **Financial Project Number**, from the list box,
- From the Menu Bar, select **Edit > Import Controlling PCN Data**.



If there are several projects to be strung to the Proposal Header, import this data for the lead project and alter fields in the Proposal Header as necessary to reflect the combined work.

The warning screen tells which fields will be filled with imported data.

- Click **YES**.
- Enter as much information as possible for the remainder of page 1. Be sure to enter the following required fields.



**Contract ID** Enter the planned **Contract Number** and use it as a Proposal Identifier.

**District Let Contracts:** Enter the planned District Contract number in the general form **E#???**, where # is District Number and ??? is a sequence number. Do not enter dashes or spaces.

**Memorandum of Agreement** Enter in the form of **#????**, and select MMOA in the **Contract Type** field. **Do not** enter dashes or spaces.

**Renewable Contracts:** Enter the regular District Contract Number as above followed by **-R0** (R-“zero”).

**Special Note: Bid Method** For Alternative Bidding, choose a value from the list box, (example: for Maintenance Lump Sum Contracts choose “**A4 Lump Sum**”). Leave the field blank if Alternative Bidding is not involved.

**Contract Type** Choose the proper type from the following list.

<b>MAM</b>	Maintenance Asset Management
<b>MBVP</b>	Maintenance Best Value Performance
<b>MC</b>	Maintenance Contract
<b>MEC</b>	Maintenance Emergency Contract
<b>MLBP</b>	Maintenance Low Bid Performance

**MMOA** Maintenance Memorandum of Agreement  
**MSL** Maintenance Streamline – Used with specific Maintenance Office approval only.

**Renewable** Assign the flag **Y** if suffix **-R0** is assigned to the **Contract Id**, otherwise assign **N**.

The screenshot shows the 'Add Proposal' window with the 'General' tab selected. The interface includes a navigation bar with tabs for 'General', 'Description', 'Sites', 'Projects', 'Special Provisions', 'Sections', 'Items', 'FY Schedule', and 'Attachments'. Below the tabs, there are two radio buttons for 'page 1' and 'page 2'. The main area contains several input fields and checkboxes:

- Contract ID: [ ]
- Spec Year: 13
- Prev Let As Cont ID: [ ]
- Description: [ ]
- Fed/State Project No.: N/A
- Location: [ ]
- Route Number: [ ]
- Road System: [ ]
- Highway Type: [ ]
- Highway Number: [ ]
- Primary District: [ ]
- Control Group: [ ]
- Counties: [ ]
- Proposal Class: [ ]
- Qualification Classes: [ ]
- Letting No.: [ ]
- Official Estimate: [ ]
- Renewable: [ ]
- Performance Based: [ ] (maintenance use only)
- Cntl PCN: [ ]
- Suppl. Spec Year: [ ]
- Proposal Type: [ ]
- Bid Method: [ ]
- Contract Type: [ ]
- Contract Work Type: [ ]
- Set Aside Proposal: [ ]
- Execution Days: [ ]
- Special Start Date: 00/00/0000
- Acquis./Flexible Start Time: [ ] (User may edit selected value)

**Maintenance contracts require an official estimate to support the bid review process and shall remain confidential in accordance with procedure # 375-000-001, Section 4.3 and 6.6.**

<b>Description</b>	<b>Contl PCN*</b>	<b>Federal/State Project Number (N/A)</b>
<b>Spec Year</b>	<b>Prev Let As ContID</b>	<b>Proposal Type Proposal Class (I)</b>
<b>Primary District</b>	<b>Control Group</b>	<b>Counties** Contract Work Type (I)</b>
<b>Special Start Time</b>	<b>Acquisition Time</b>	

When you finish adding information to Page 1, click the page 2 radio button located in the upper left corner of the General Tab.

**\*Contl PCN** Indicates which project is the controlling project in a multi-project. If a Federal Aid (FA) project is included in the Projects attached to the Proposal then it would be the Controlling Project. In the event multiple projects have FA funds the FA Project with the largest amount of Federal Aid would be the Controlling Project.

**\*\*Counties** Enter up to four counties for each proposal (select from the drop down list) with the entry in the PES “Primary” field being the primary county in SiteManager. This will be the County on the Controlling Project (Cntl PCN) with the largest percentage of work. This can be determined by the data being provided from FM and if the information is not provided by FM then it must be determined by the review of the Plans.

When there are multiple Counties on the Controlling Project with the identical percentage of work, (Example: each has 50%) the Project Manager should select the “Primary County” on the Proposal General Screen marked “Primary County.”

### General Tab page 2

- Continue entering information. Most of these fields have default values.

*Bid Bond (0)*

*Cost of Proposal Package*

*Section Assignment*

*Cost of Plans*

*Cost of Specs*

*Cost of Proposal*

*Last Addendum Number*

*Last Description Number.*

*Proposal Notes*

*Fuel Adjustment (Label and field currently hidden; not applicable got Maintenance contracts)*

### The Description Tab

The proposal description can appear on proposal-related reports, such as the notice to bidders. This field should be a general description of the work, where it is located, and any unusual aspects that should be made known.

In the Proposal tabbed folder window,

- Click the **Description** tab.

Begin entering information on the top row and at the extreme left of the window. Enter a description of approximately 32,000 characters or 400 lines. **Do not press <ENTER> at the end of each line;** Trns•port automatically wraps text to a new line. Press <ENTER> only to start a new paragraph. Use the windows

Site Number	Description	Type of Days	Specified Completion Date	Number of Days	Road User Cost Per Day	Specified Start Date	Liquidated Damages
00	Contract Time	CD	00/00/00	365		00/00/00	1

Copy (or CTRL+C) and Paste (or CTRL+V) commands from the Edit menu to copy and paste text from other programs such as word processing.

### The Sites Tab

The Site Details window will appear in the lower portion of the screen. The Site number is assigned a default value of "00". Enter overall information regarding the proposal. If additional completion dates or mandatory start dates are required for portions of the proposal, add additional rows by clicking **ADD MORE**. Number these other Sites from 01 onward.

- Each site record requires information in the following fields:

<i>Site Number</i>	<i>Type of Days</i>	<i>Liquidated Damages per Day</i>
<i>Number of Days</i>	<i>Specified Start Date</i>	<i>Specified Completion Date</i>
<i>Description</i>		

**NOTE:** Most Maintenance Contracts will not require *Specified Start* or *Specified Completion Dates*. The default settings of 00/00/00 will satisfy the requirement for data in these fields. When the contract does require actual dates, enter them.

Enter at least one proposal site record. The liquidated damages rate has been set to "1". **Do not change this value.** Liquidated Damages information will be communicated to bidders as a part of the specification package. Assessed LD's will be handled in SiteManager as Contract Adjustments.

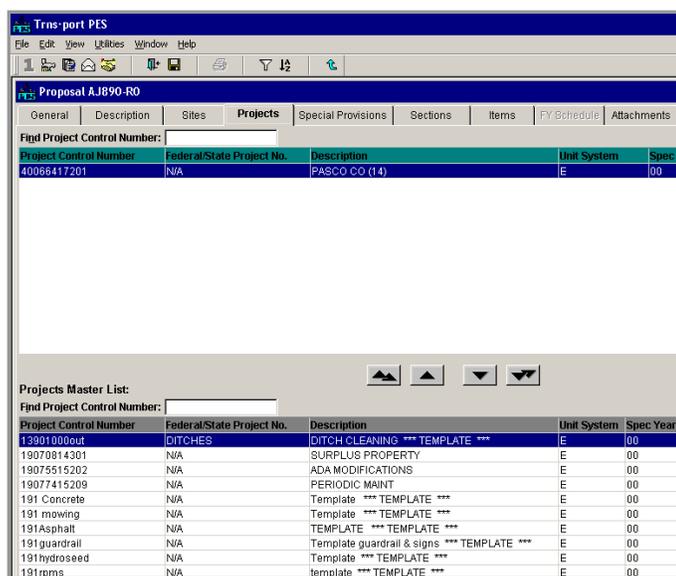
When the Site Information is complete

- **Click OK** for the information to be recorded in the data row.

### The Projects Tab

This shows the Projects tab of the proposal. The lower portion of this screen displays a list of projects that are not attached to any proposal and so are available to be assigned to the new proposal. This list will only contain projects that match the *Spec year* specified on the General Tab, and the *Unit System* of the *Controlling PCN*.

The first project to be attached to a proposal will govern the specification



year and unit system for the proposal, so that all projects displayed in the lower section of the window will conform to the *Spec year* and unit system of the lead project.

- ❖ **Warning:** In the Tabbed Folder mode controls exist to block a project from being attached to more than one proposal as well as requiring all attached projects to be of a common *Spec year* and unit system. There is the ability to make these erroneous attachments via the drill down method. **DO NOT** attach projects to proposals in the drill down mode of PES, because these protections regarding *Spec year*, *Unit System*, and previously attached projects are not available.

To add an additional project or projects to the proposal, scroll through the list in the lower part of the window and highlight those that are to be added. Highlight multiple projects by holding down the **CTRL** key while you select the needed projects.

- Highlight the projects:
- Click the up arrow.

**Note.** Do not use the double up-arrow. It will attach every project in the list to the proposal header.

### The Special Provisions Tab

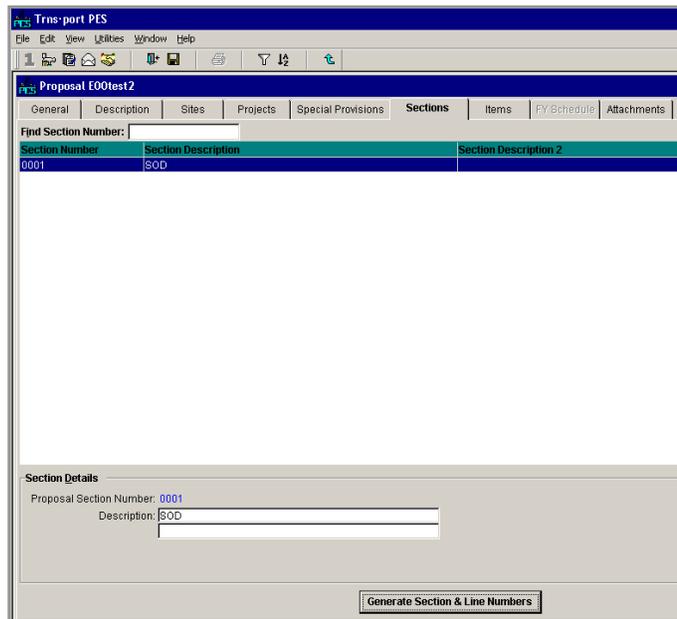
The Special Provisions tab features of Trns•port are not being used at this time.

### The Sections Tab

This shows the Sections Tab.

- Click **Generate Section and Line Numbers**.

The section numbers are set by Trns•port and show in blue, indicating that they cannot be changed. The section descriptions are available to be changed if desired. The description will default to the description of the lowest category number in the section (Asphalt Repair - Manual -0411 or Guardrail Repair (LF) - 0526), and in some cases, will need to be changed to reflect the total project.



## The Proposal Items Tab

The estimated prices may be changed through the Proposal Worksheet. All modified prices will be sent back to the original project Item price(s), in order to maintain consistency of information within all parts of the proposal.

No other information may be changed in this worksheet. If quantities are to be changed, they must be changed in the proper project.

Sec.	Prop. Line No.	Item	Alternate Item ID	Description	Units	Lump Sum	Quantity	Price
0001	0010	0102 1		DESIGN/BUILD (BUILDING)	LS	DA	1,000	5,000.00
0001	0015	0102 1		MAINTENANCE OF TRAFFIC	LS	DA	1,000	5,000.15
0001	0020	0120 4		EXCAVATION SUBSOIL	CY		3500.000	0.95
0001	0025	0120 5		EXCAVATION CHANNEL	CY		2500.000	0.95
0001	0030	0120 6		EMBANKMENT	CY		660.000	7.15
0001	0035	0120 72		FILL GRAVEL	CY		1500.000	1.05
0001	0040	0121 70		FLOWABLE FILL	CY		2000.000	2.00
0001	0045	0570 3		SEED GRASS (PERMANENT TYPE)	LB		5454.000	0.55
0001	0050	0570 4		MULCH MATL	TN		53.800	50.95
0001	0055	0570 9		WATER FOR GRASS	MG		350.000	8.15
0001	0060	0575 1		SODDING	SY		15852.000	2.95
0001	0065	0577 70		SHOULDER REWORK	SY		50600.000	0.75
0001	0070	E104 4 2		MOWING (SLOPE)	AC		10.000	68.87
0001	0075	E570 6		FERTILIZER (SLOW RELEASE)	TN		48.000	225.00

## The FY Schedule Tab

The FY Schedule Tab is not in use.

## The Attachments Tab

The Attachments Tab is not in use.

## Changing Proposals

To change information about an existing proposal,

- Rclick the proposal in the Proposals List window
- Click **Tabbed Folder Change** from the right mouse button menu.

Trns•port displays the Proposal tabbed folder window with all current information.

- Add or change information in any field except **Contract ID**.

When changes are complete,

- Click **OK** to save them, or **CANCEL** to return to the Proposal List window without saving.

Contract ID	Description	Type
1P0104	REST AREAS RE-PAINT	MPO
1P0108-R0	REST AREA	MPO
1P188740	GUARDRAIL REPAIRS	MPO
40560015274	Highway lighting repairs in Hillsborough County	MC
40666017801	SEMINOLE COUNTY	MMOA
40703517202	Asset Maintenance for I-4, I-275, I-175, I-375 & I-4 Connector	MC
41022117218	BRIDGE DRAINAGE REPAIR	MC
594 E Templ	Shoulder Repair/Ditch & Pipe Cleaning *** TEMPLATE ***	MC
594 MOA Templ	City of Orlando I-4 MOA *** TEMPLATE ***	MMOA
63662	Temporary Semi-Skilled Labor	MC
66666	JESSE O LEWIS ROAD	CC
9999	SR 95 (US 29)	CC
<b>A0222</b>	<b>Entrance Replacement and Sidewalk Replacement (FYCC)</b>	<b>MC</b>
A1	Add	31)
A1234	Change	CC
A3158	Delete...	31)
AG147	Tabbed Folder Add	AGREEMENT
AG704	Tabbed Folder Change	nty Master Agreement
AH261	Tabbed Folder View	ntenance JPA w/ Miami-Dade County
AI517	Proposal	MPLEY MOA
AI517-	Proposal	MUM OF AGREEMENT WITH THE CITY OF CHIPL

## Deleting Proposals

You can delete a proposal and its associated references, which include the following information:

- Related addendum information.
- List of projects associated with the proposal.
- Any association between the proposal and a bid letting.
- Project estimate information for all projects belonging to the proposal.

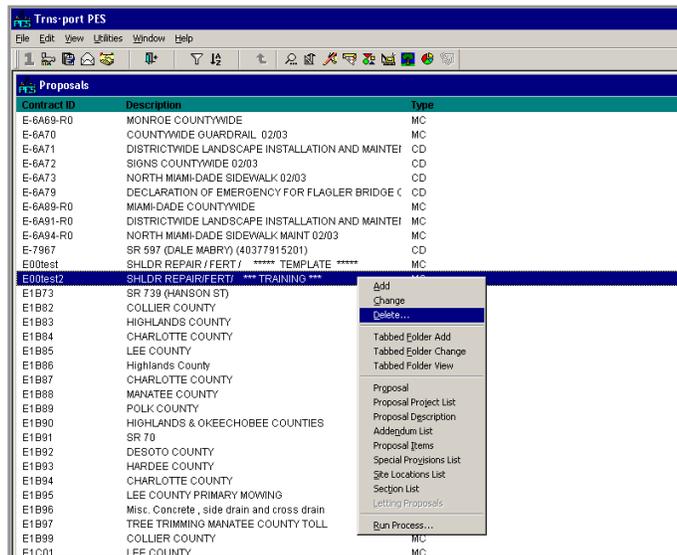
**Do not delete proposals that still have data in Trns•port LAS** (for example, bid tab or planholder data); otherwise, the Trns•port LAS data for those proposals will not be accessible.

To delete a proposal record:

- Rclick the proposal(s) or proposals in the Proposals List window.
- Rclick **Delete**.

Trns•port displays a Delete window.

If you choose **Delete**, you will delete the association of a single proposal with the projects associated with the proposal. You will also delete the proposal header records, sections, addenda, proposal sites, and long description. Click **CANCEL** to return to the Proposals List window without deleting.



- Click **OK** to continue the delete process. Trns•port displays a Delete Warning window.
- Click **YES** in each of the windows to complete the delete process.

The authority to delete proposals is controlled by security access. If you are not able to delete a proposal, see your District Application Manager.

## Preparing to Advertise

When the proposal is complete and ready to transfer to the district Contracts Administration Office, open the proposal header and change the **Access Control Group** from **MD##** to **ML##**. At the same time open the project headers of all associated projects and change their **Control Groups** to **ML##**. The district Contracts Administration Office will then initialize the proposal in LAS and prepare the advertisement documents.

## Working with Addenda

After a contract (proposal) is advertised, all future changes to the proposal must be by Addendum. In an Addendum, you may add new items, change existing items, or delete items. The items may be in the same or different categories. To add an addendum to a proposal, you:

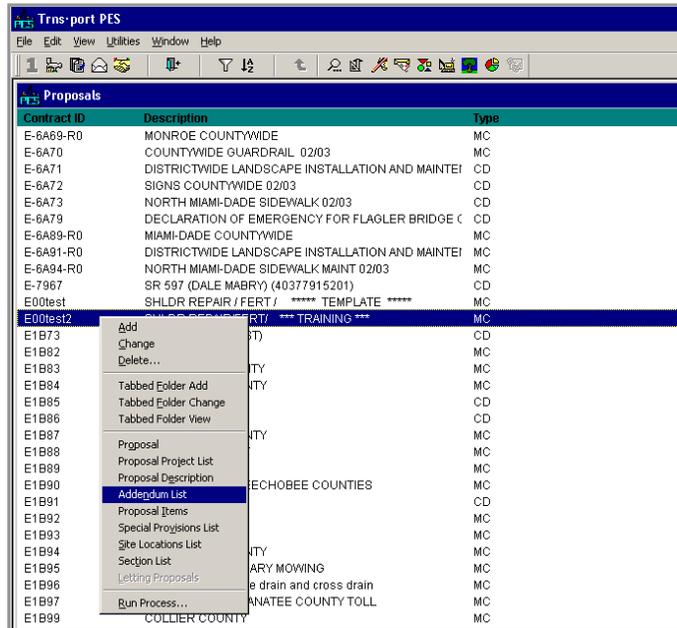
- Create an addendum header
- Specify the project and category for each proposal addendum Item.

The proposal will have to be re-initialized in order to transfer addendum information from Trns•port PES.

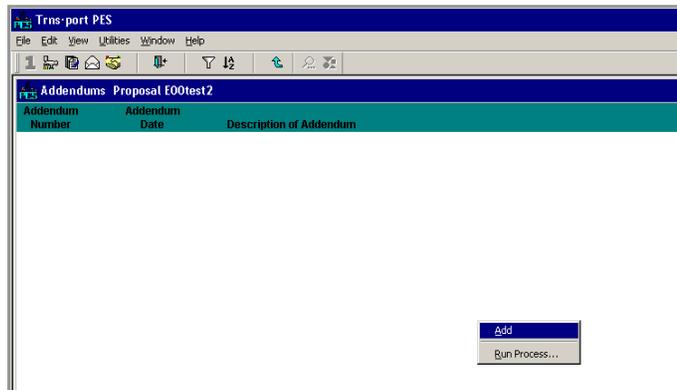
### Creating the Header Record

To create the addendum header:

- Click the affected proposal in the Proposals List window
- Rclick **Addendum List**.



- Rclick **Add**.

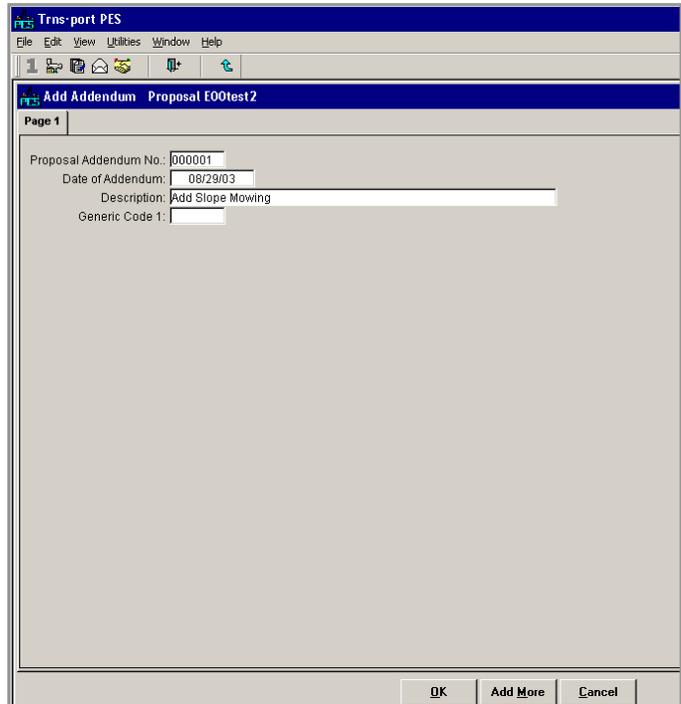


The Addendum Header Detail window opens.

- Enter information in the following fields:  
***Proposal Addendum No.***  
***Date of Addendum***  
***Description***

When the addendum detail is complete,

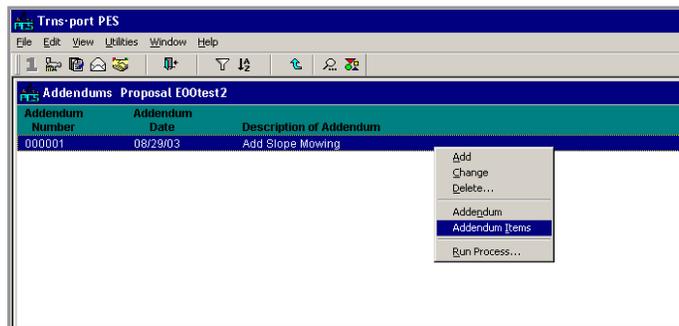
- Click **OK** to save the record, **ADD MORE** if to add another addendum header, or **CANCEL** to return to the Addenda list window without adding an addendum.



### Addendum Item Information

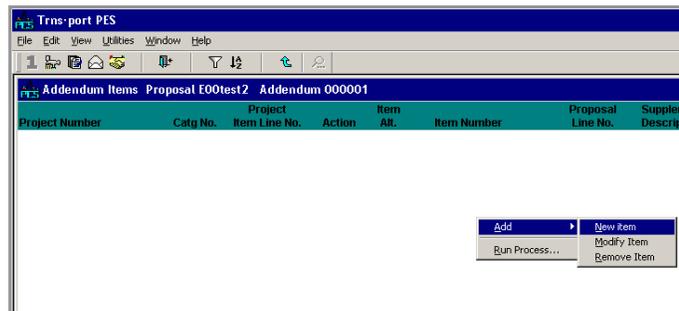
For the first change to a proposal, there will be no Addendum Item information. To create the first one:

- Rclick the addendum header
- Click **Addendum Items**.
- Place the cursor in the white space and
- Rclick **Add**.



From the next window select:

- New Item
- Modify Item,  
or
- Remove Item



Choose the appropriate action and proceed as indicated below.

## Adding New items

The Add Addendum Item Detail window will appear.

On this screen, in sequence:

- Click the **Project No.**, from the list box.
- Click the **Category Number** from the list box.
- Enter a **Project Item Line No.** that **does not already exist on the project**. Recall that Project Item Line Numbers are initially generated in steps of five.
- Examine the project worksheet, the Preliminary Detailed Estimate or Generate a Section and Line Numbers (inquiry) report and assign appropriate line numbers.
- Enter an **Item Number** or select from the list box, which takes you to the Master Pay Item file.
- Enter the **Quantity** for the added Item.
- Assign a **Proposal Line Number that does not already exist on the proposal**. Recall that Proposal Line Numbers are initially generated in steps of five. Examine a copy of the Proposal Schedule and determine where the Item should be displayed, and assign appropriate line numbers.
- Click **OK** if there is only one Item to add or **ADD MORE** if other items are to be added.

## Modify Existing Items.

If the addendum is to modify one or more Items,

- Click **Add>Modify Item**.

This window will open. Proceed sequentially to:

- Click the **Project Number** from the list box.
- Click the **Category Number** from the list box.
- Click the **Project Line Number** from the List Box (the Pay Item and Proposal Line Numbers are now identified).
- Enter the corrected **Quantity**.
- Click **OK** or **ADD MORE** if other Item quantities are to change.

## Deleting items

If an Item is to be deleted,

- Click **Add > Remove Item**.

This screen will open. Then, in sequence select:

- **Project Number**
- **Category Number**
- **Project Item Line Number**

Addendum items WILL NOT show in the Items Tab in the Proposal Folder. The Addendum items WILL show on the Proposal Schedule Report

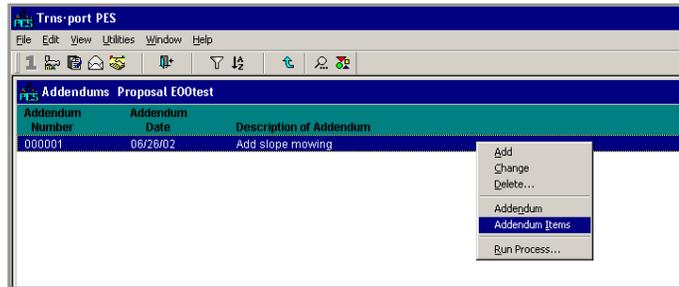
## Correcting Addendum Item Information

If the addendum has been completed and there are errors, it may be re-

Contract ID	Description	Type
E-6A69-R0	MONROE COUNTYWIDE	MC
E-6A70	COUNTYWIDE GUARDRAIL 02/03	MC
E-6A71	DISTRICTWIDE LANDSCAPE INSTALLATION AND MAINTENANCE	CD
E-6A72	SIGNS COUNTYWIDE 02/03	CD
E-6A73	NORTH MIAMI-DADE SIDEWALK 02/03	CD
E-6A79	DECLARATION OF EMERGENCY FOR FLAGLER BRIDGE CD	CD
E-6A89-R0	MIAMI-DADE COUNTYWIDE	MC
E-6A91-R0	DISTRICTWIDE LANDSCAPE INSTALLATION AND MAINTENANCE	MC
E-6A94-R0	NORTH MIAMI-DADE SIDEWALK MAINT 02/03	MC
E-7967	SR 597 (DALE MABRY) (40377915201)	CD
E00test2	SHLDR REPAIR	MC
E1B73	SR 739 (HANSOT)	CD
E1B82	COLLIER COUNT	MC
E1B83	HIGHLANDS COU	MC
E1B84	CHARLOTTE CO	MC
E1B85	LEE COUNTY	CD
E1B86	Highlands Count	CD
E1B87	CHARLOTTE CO	MC
E1B88	MANATEE COUN	MC
E1B89	POLK COUNTY	MC
E1B90	HIGHLANDS & O	MC
E1B91	SR 70	CD
E1B92	DESOTO COUNT	MC
E1B93	HARDEE COUNT	MC
E1B94	CHARLOTTE CO	MC
E1B95	LEE COUNTY PR	MC
E1B96	Misc. Concrete, s	MC
E1B97	TRUCK TRAILING	MC

opened. To do this,

- Click the proposal involved from the Proposal List window.
- Rclick **Addendum list**. To change the header information,
- Rclick **Change** and make the necessary corrections.
- If you need to add change or delete Items, Click **Addendum Items**.



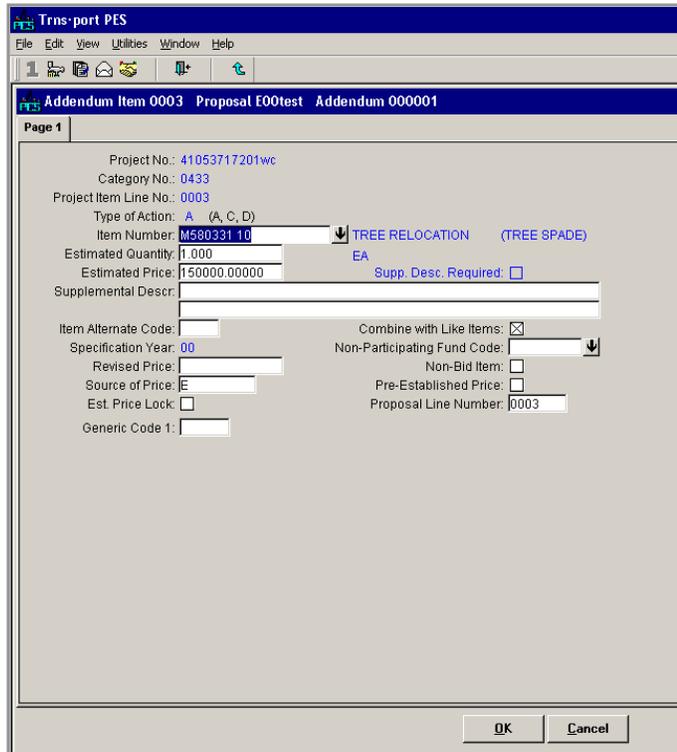
Trns•port now displays the Addendum Items List window.

- Click the Item of interest.
- Rclick **Change**.



The Addendum Item Detail Window will open. Several fields are now in blue. These cannot be changed.

- Change other information as necessary.
  - Click **OK** to save the changes.
- Or
- Click **CANCEL** to return to the Addendum Items List window without saving.



If you need to add or delete additional items of the addendum, choose those options from the right mouse button window.

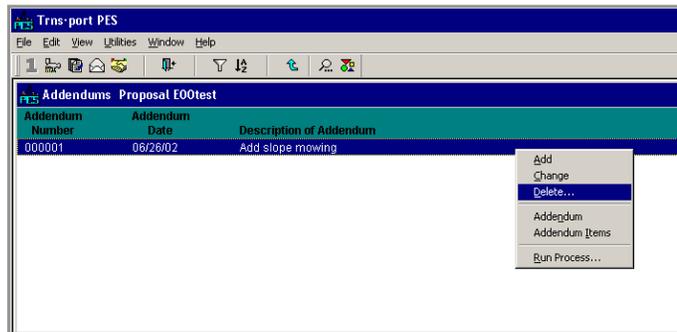
## Deleting an Addendum

If an addendum has been entered in error, it may be deleted.

- Rclick the **addendum** in the Addendum List window.
- Click **Delete**.

Trns•port displays Delete Warning windows.

- Click **YES** in each window to complete the delete process.



## Maintaining Addendum Item Information

Trns•port treats each addendum Item record as a transaction to apply to the original project. Because Trns•port includes addendum items in Trns•port LAS reports, you must specify the project, category, Item number, and Item alternate code (if any) for each proposal addendum Item. You must also specify the proposal section number and proposal line Item number.

To maintain addendum Item information, select the addendum for which you want to maintain Item information and select Addendum Items from the right mouse button menu. Trns•port displays the Addendum Items List window.

## Listing Proposal Addenda

To produce a printed copy listing proposal addendum information,

- Click the proposal or proposals to list addenda from the Proposals List window. (Select more than one proposal by holding down the **CTRL** key while selecting proposals.)
- Click **File > Run Process** from the Menu Bar. This will display the Processes window.
- Click **List Proposal Addendum** from the report list.
- Click **OK** to run the process.
- Click **SUBMIT** to run the process, **PARAMETERS** to change process submission parameters,

Or

- Click **CANCEL** to return to the Proposals List window without running a process. See Running Processes and printing Reports for more information.

## Rejecting Bids

When the occasion arises that bids are to be rejected and a contract is to be re-advertised the process will begin in the District Contracts Administration Office. Certain fields in the Letting process will be set to blank or set to indicate that the bids are being rejected and the contract re-advertised.

## The Old Proposal Header

- Change the *Access Control Groups* of the **proposal and all associated projects** from **ML##** to **MD##** so that the person in the district maintenance office who created the proposal header will be able to continue the process of preparing the projects and creating a new proposal header for the re-advertisement.
- From the Proposals List window, Rclick the proposal to be modified.
- Click **Tabbed Folder Change**.
- Click the Projects tab
- Click the single or double down arrow to remove the project(s) from the proposal.
- After removing the project(s), close the proposal and save the file. This process makes the project(s) available to be attached to a new Proposal Header.
- Change the *Access Control Groups* of the proposal from **MD##** to **ML##**, as appropriate. The old proposal header will then be available in the appropriate contracts administration office for history purposes.
- When the Save confirmation message opens, click **YES**.

## The Projects

Make changes to the projects(s) that may be necessary. In particular, if there were any addenda to the original proposal, enter all such data into the projects before re-advertising the proposal.

## The New Proposal Header

- From the Proposals List window, with your cursor on any proposal, select **Tabbed Folder Add** from the right mouse button menu.
- In many cases, using the Copy Special feature for projects, categories, and proposal can save steps. In this case, however, it is important to **NOT use the Copy Special** feature. If the original proposal had addenda attached to it, the number of the last addendum issued, would be recreated on page 2 of the new Proposal General Tab.
- When the new Proposal General Tab window appears:

- Go to the Cntl PCN: field, and from the list box select the lead project.
- From the file menu, choose Edit, Import Controlling PCN data.
- Enter the new Proposal Identifier (“E” Number).
- Click the page 2 radio button,
- Enter the **old Proposal Number** into the **Prev. Let As ContID** field. It is at the top of the right column.
- Select any additional project or projects to be connected to the new Proposal Header. Click the single up arrow.
- Click the Items tab. A warning window will open indicating that changes have been made to the proposal Click **OK**.
- Click the Generate Section and Line Numbers button at the bottom of the window. Change the Section Description as appropriate.
- The reconstructed proposal Item information will appear in the Items tab.
- Save and close the tabbed folder by clicking on the "X" for the tabbed folder window.

## Running Processes and Printing Reports

### Project level reports

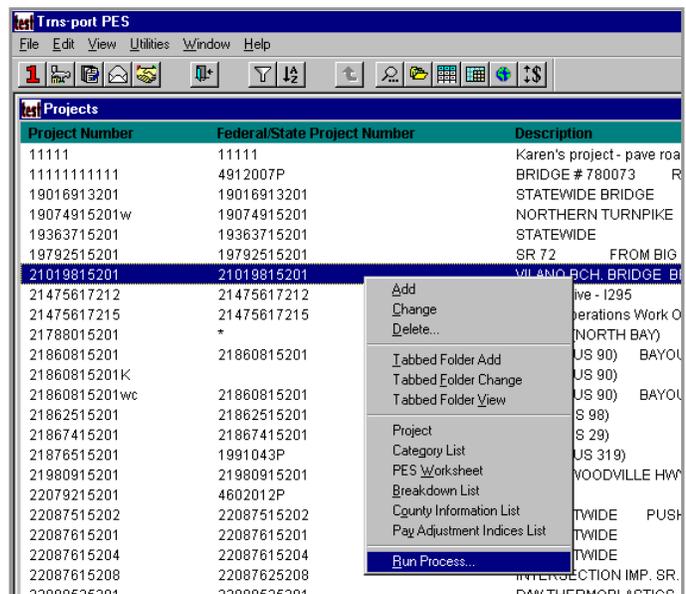
One of the most useful reports is the Preliminary Detail Estimate. It may be run at both project and proposal levels. Its value is that it contains all of the structural detail of the project or proposal with line numbers, sections, categories, items, and quantities. Trns•port also summarizes the estimate with subtotals in several formats.

To run project level reports, begin at the Project List window.

- Highlight the project(s) for which you want to generate reports in the Projects List window.
- Rclick **Run Process**.

This will display a list of processes that are available at the project level.

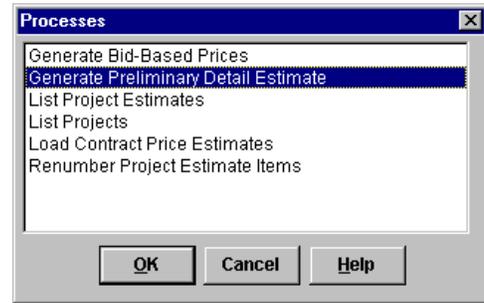
Here is a sample list. Your security authority may not permit you to run all of the processes available in the system.



Click **Generate Preliminary Detail Estimate**.

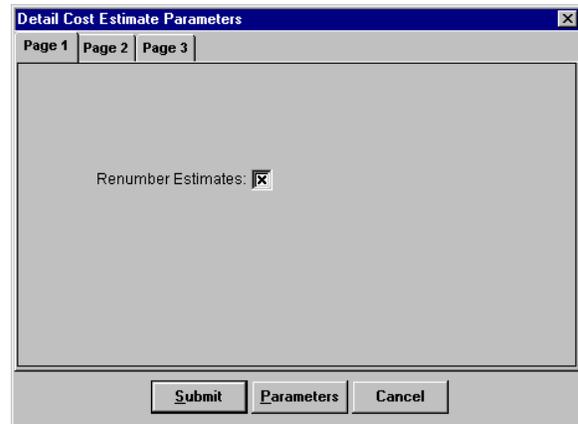
- Click **OK**.

Trns•port displays the Detail Cost Estimate Parameters window.



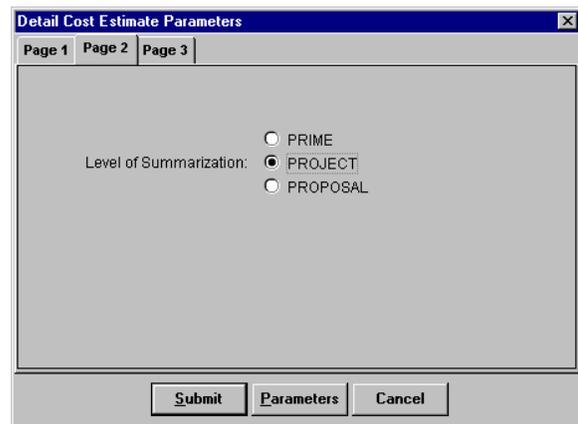
You will see the parameter selection window, which has three pages. Page 1 shows a default selection to renumber the Item line numbers

- If you do not want to renumber them, turn off the "x".
- Click the Page 2 button.



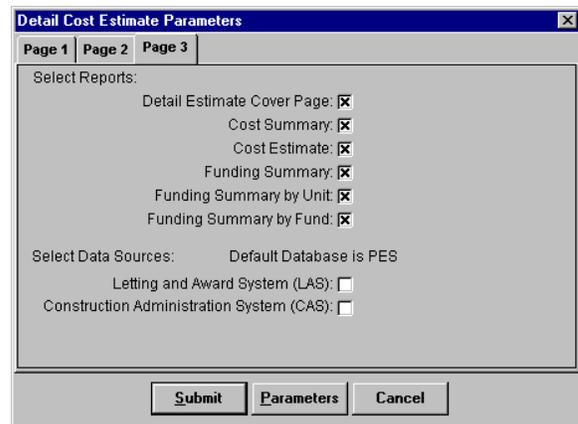
Enter the level of summarization on Page 2. This option determines whether you run the Detail Estimate for a project, or proposal. The Department is not using prime projects.

- Click Project level of summarization,
- Click the Page 3 button.



The Parameters window allows you to select the reports you want to produce.

- Check the boxes of the reports you want to generate.
- Click **SUBMIT** to run the process, **PARAMETERS** to change process submission parameters, or **CANCEL** to return to the Projects List window without



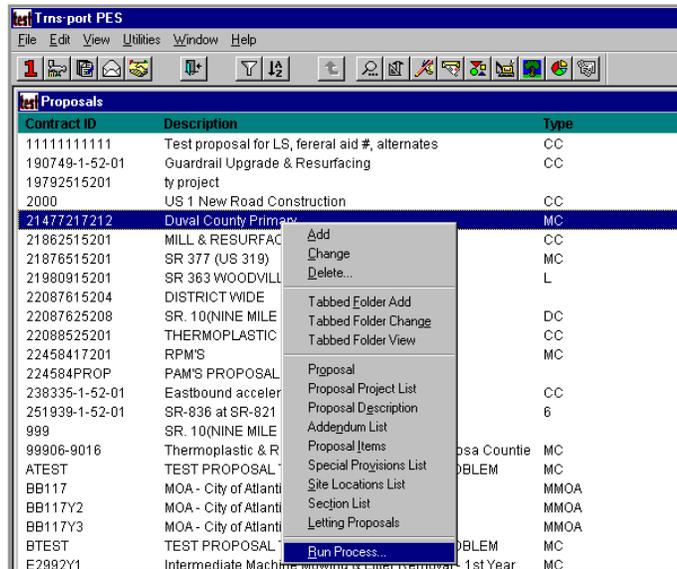
running a process.

## Proposal Level reports

To generate proposal schedules,

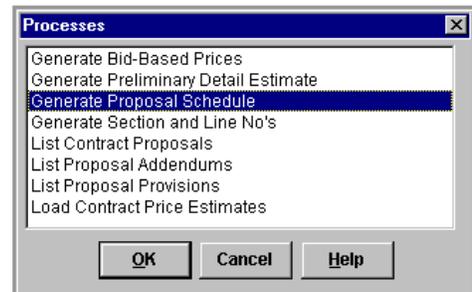
- Click the proposal in the Proposals List window.
- Rclick **Run Process**.

This will show you the list of processes that are available at the proposal level.



Here is a sample list of processes that are available. Your security authority may not permit you to run all of the processes available in the system.

- Click **Generate Proposal Schedule** from the Processes window
- Click **OK**.

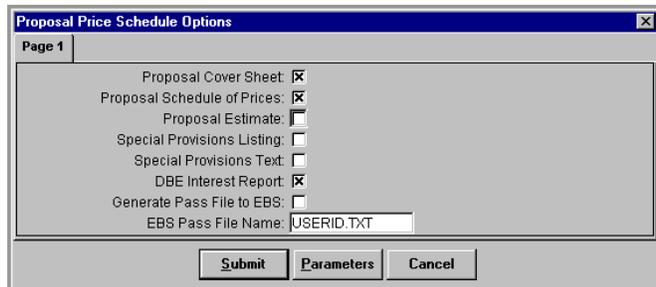


Here are the report options. Because of the security of estimates, estimators will need to run this process, including the Engineer's estimate, if desired.

- Click the options you want.
- Click **SUBMIT**

Two information windows will appear to confirm that the process has been submitted and when it has completed running.

- Acknowledge both when they appear.



## Process Status

To see the results of this process,

- From the Menu Bar, Click **File > Process Status.**

Description	Type
proposal for LS, fereral aid #, alternates	CC
rdrail Upgrade & Resurfacing	CC
object	
1 New Road Construction	CC
al County Primary	MC
L & RESURFACE	CC
377 (US 319)	MC
363 WOODVILLE HWY	L
TRICT WIDE	
10(NINE MILE RD.)	DC
22088525201 THERMOPLASTIC	CC
22458417201 RPM'S	MC
22458417201 RPM'S	MC

This screen lists all of the processes you have recently run.

- Click the report you just ran (check the date and time columns),
- DbClick the blue band.

Process Name	Status	Date Submitted	Queue Time	Start Time	
PESGPPSA	Completed Successfully	09/19/99	06:38 pm	06:38 pm	06:38
PESMPRPA	Completed Successfully	09/18/99	05:10 pm	05:10 pm	05:10
PKARENA	Completed Successfully	09/16/99	10:34 am	10:34 am	10:34
PKARENB	Completed Successfully	09/16/99	10:12 am	10:12 am	10:12
LASINITC	Completed Successfully	09/13/99	02:15 pm	02:15 pm	02:15
LASINITD	Completed Successfully	09/13/99	02:28 pm	02:28 pm	02:28
LASINITB	Completed Successfully	09/13/99	11:20 am	11:20 am	11:20
LABGBTAA	Completed Successfully	09/13/99	10:52 am	10:52 am	10:52

This displays the reports available from this process.

- DbClick the report **output1.txt** and review the report on screen.

Name	Size	Date	Time
output1.txt	44283	09/19/99	18:38:46
output2.txt	984	09/19/99	18:38:46

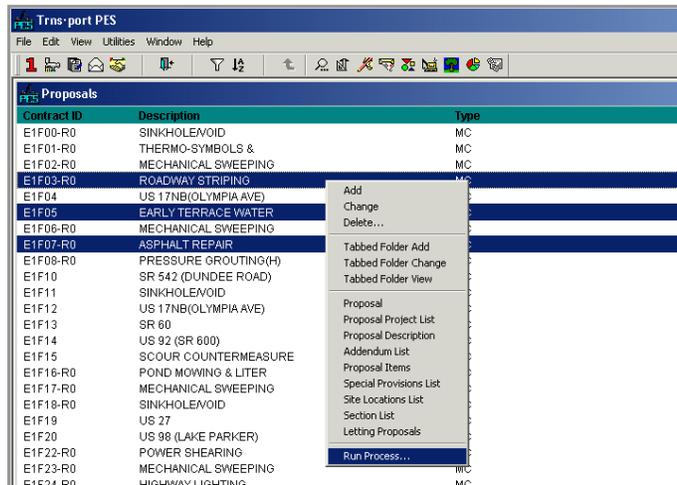
## Electronic Proposals and Addenda

All central Office and many District Office let contracts will be produced and distributed on electronic media. When the proposal processing has reached the stage of transferring control of the proposal to the Contracts Administration Office, the electronic proposal may be prepared. All of the processes of creating electronic proposals and addenda are performed in the Contracts Administration offices (Central Office and District Offices). The Proposal will have been attached to a Letting Header and the proposal initialized into LAS.

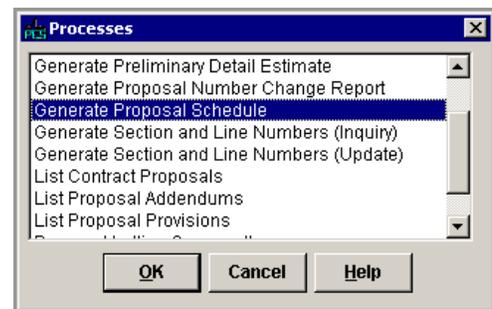
## Creating the Proposal

Begin in the Proposals List window as seen here.

- Click the **Proposals(s)** to be prepared.
- Rclick **Run Process**.

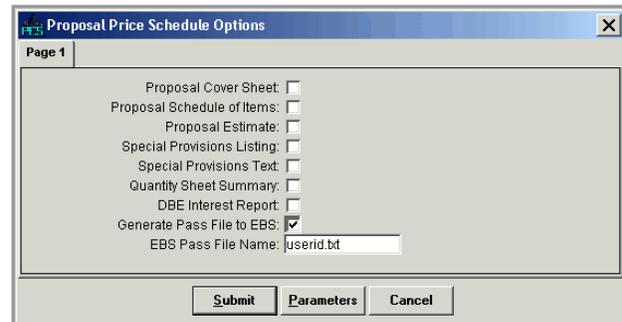


- Click **Generate Proposal Schedule**.



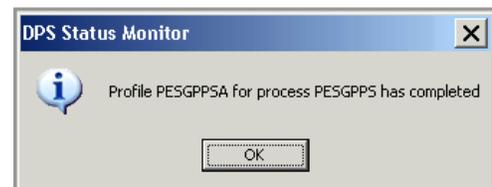
The Proposal Price Schedule Options window will open. It is the same window used to create a paper proposal schedule.

- Check the box labeled **Generate Pass File to EBS**.
- In the **EBS Pass File Name** field leave the entry **Userid.txt**.
- Click **Submit**.



Wait until the Status Monitor reports that the process has completed. An electronic proposal flat file is now located on a Trnsport server.

- Click **OK** to close the window.



## Download Files

Download the file(s) from the Trns•port system and move them to a new location.

From the Menu Bar,

- Click *Utilities > Download File > Process I/O File.*
- DblClick the directory *qbsfnamdir.*

In the File Name window,

- DblClick your *userid.txt.*

The Save I/O File window will open for you to choose file location and name. Click the Navigate Up  icon until you reach this screen:

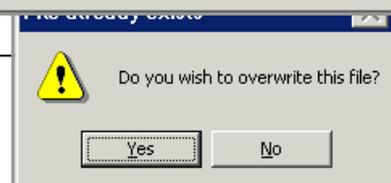
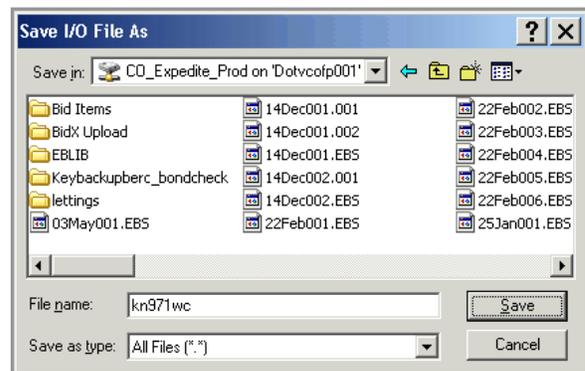
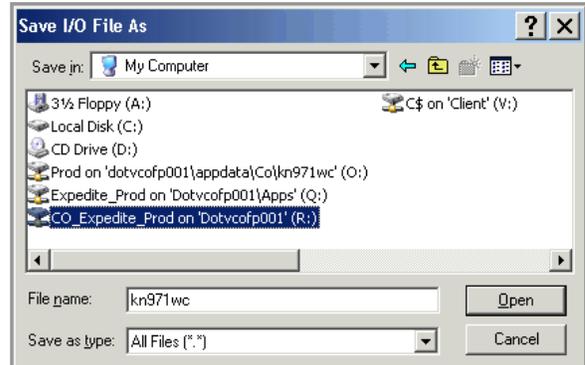
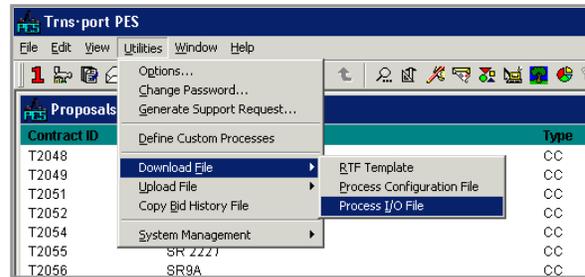
For Central Office processing,

- Choose the folder labeled *CO\_Expedite\_Sys on 'Dotvcopf001' (R:).*
- Click *Open.*

For District processing, the file structure is built in a similar manner, but the CO is be replaced by your district number.

**Caution:** These next steps will copy the newest version of *userid.txt* and overwrite previous versions. Be sure that previous downloads of *userid.txt* have been processed by the Expedite **Gen** module, and the EBS files placed in their proper folders.

This screen will now open to accept the new file.



- Click *Save*.

Next, you will receive this warning/confirmation message

- Click *Yes* to overwrite the file.

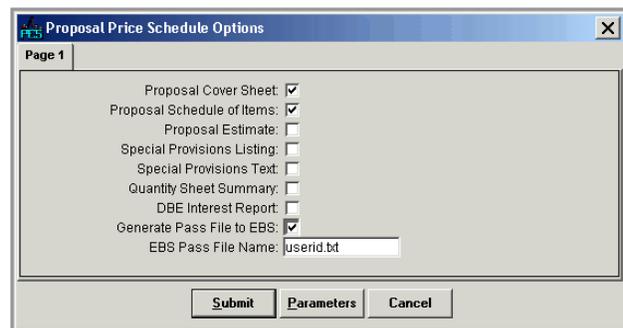
The electronic proposal(s) is now complete and available for the Contracts Administration Office in either the Central Office or a District Office to prepare discs for delivery to prospective bidders using the Expedite program and its modules. The **Gen** module of Expedite will convert the *userid.txt* file into another format useable by bidders.

### Electronic Addenda

Once the job has been advertised and proposals distributed to prospective bidders, all changes to the proposal will be made by addendum.

When the addendum has been processed, run the **Generate Proposal Schedule** again.

- Check **Proposal Cover Sheet** to see a paper version.
- Check **Proposal Schedule of Items** to see a paper listing.
- Check the box labeled **Generate Pass File to EBS**.
- Click **Submit**.



The remainder of the steps are the same as the creation of the original file above. After the **Gen** module in “Expedite” transforms the file for bidder use, an additional file for each addendum will be included.

## Appendix A Control Group

The assignment of Access Control Groups is one of the principal tools available to the Department to control access to project data. Through the plan outlined here, a hierarchy can be established where data may be compartmentalized to restrict access to a set of people who need visibility of a particular project and to deny visibility to those who don't.

The use of Control Groups satisfies two concerns. The first is to reduce the volume of information that will appear on Project List screens, and second to secure information during the bidding and award process. The use of Control Groups allows the visibility of projects to be moved from one person to another. An example would be a project in District 2 that might have a Control Group of MD0296. With this Control Group assigned to the project, the District Estimator(s), having a personal Access Control Group of MD02\*, would always have visibility of the project. Similarly, any person having an Access Control Group that is less restrictive would also be able to see the project on his or her project list screen. For example, a user with an Access Control Group of M\* would have access to every project in the Maintenance organization statewide.

The following table illustrates how visibility of projects to a community (Maintenance or Production) for oversight is granted, and then to a smaller group of project or maintenance staff for the control and management of project detail.

	<b>PES</b>	<b>LAS</b>
District Contracts Manager	?L##*	?L##*
District Contracts Assistant A	?L##A*	?L##A*
District Contracts Assistant B	?L##B*	?L##B*
District Maintenance Engineer	MD##*	None
Assistant District Maintenance Engineer A	MD##A*	None
District Maintenance Contract Estimator	MD##*	MD##*
Assistant District Maintenance Contract Estimator	MD##A*	MD##A*
District Work Program Manager	?D##*	None
Central Maintenance Manager	M*	None
Central Estimator	CC*	CC*
Central Office Production Manager	CC*	None
Central Office Contracts Manager	CT*	CT*

## Control Group Structure:

Character position 1: M = Maintenance Project

C = Construction Project

Other characters may be assigned if desired to segment project development to other specialty areas.

Character position 2: D = District Office processing

C = Central Office processing

T = Central Contracts Administration Office

L = District Contracts Administration Office

Character positions 3 & 4: District Number

Character position 5: The letters T, U, V, W, X, Y, and Z are reserved for Central Office and statewide use. When a consultant firm is the designer of a project, the last four characters of the control group will identify the consultant firm. The letters T, U, V, W, X, and Y identify consultant firms.

A project created in the Central Office could be assigned an office code.

Character positions 6/7/8: Organizational or subordinate breakout where desired. For consultant firms, these three characters, in conjunction with a letter in character position 5, identify the firm.

For those projects let through the DCP system today, Central Office staff would rarely require access to them for control or change purposes, but may have visibility of them depending on the Control Group structure finally developed.

The Control Group feature is a very important tool, but it has limitations:

- It is not a code table and, therefore, will require a thorough understanding of the structure by Application Managers and Security Coordinators.
- Control Group is not available to Letting Headers.
- When transferring a project or proposal to another user, care must be taken to ensure that all letters in the new Control Group are capitalized, and that a valid Control Group has been used. If these precautions are not taken, a project or proposal will be removed from the project or proposal list screen of the previous user and will be available to no one. Under this circumstance, a user with high-level authority such as a Security Coordinator or Application Manager will have to find the errant project or proposal and assign a valid Control Group to it.

## Control Group Life Cycle

A Control Group assigned to a project/proposal might evolve in the following manner:

### Maintenance Contract

Receive Maintenance Project from FM	MD##
District reassigns project internally	MD##A (or other subset)
Create Proposal Header	MD##A
Pass to Contracts Administration Office	ML##
Contracts Administration Office activity	ML## (or subset if desired)
Pass to "estimator" for Bid Analysis	MD## (or other person)
Return record to Contracts Administration Office	ML##
Complete award and execute phases	ML##