Florida Department of Transportation

Trns•port PES

Release 5.9a

Proposal Development Guide

(Production)

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Introduction

This User Guide describes the procedures involved in establishing and maintaining proposals in the Trns•port Proposal and Estimates System (PES) for contracted work.

This User Guide complements the Reference Manual for Production Projects, and is reduced in scope to be a quick reference of steps in creating proposals for construction contracts.

Appendix A shows the structure of Access Control Group.

Creating a Proposal

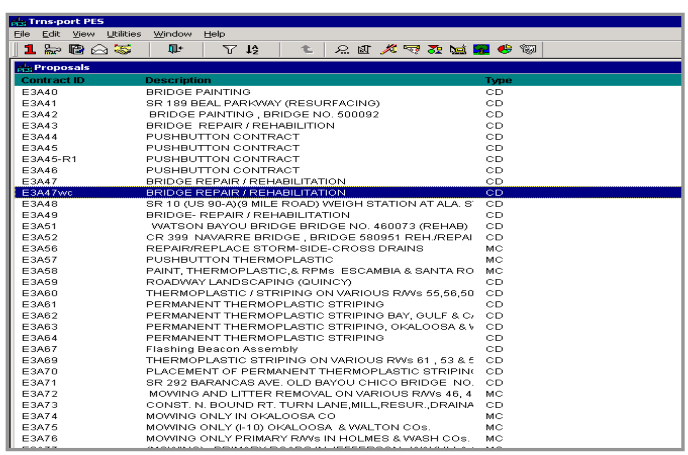
To begin the process you do not have to initially define all proposal details, just the Proposal Header information. Tell Trns•port which projects are to be assigned to it, and Trns•port will create the proposal details. After you create the proposal, assign it to a bid letting and produce the appropriate proposal and letting documents.

Lump Sum Contracts

For projects that are to be let as Lump Sum contracts, duplicate projects and proposals will be created to track project and proposal detail. These tracking projects will be set up one for one for the proposal and all projects attached to it. Tracking Projects will be identified by a thirteen character ID. The first eleven will be the regular ***Financial Project Number*** plus the two characters **LS.** These tracking projects will be fully defined with pay items, quantities, prices and all other details of a regularly let project.

The Tracking Proposal IDs will be seven characters in length. The first five will be the regular ***Contact ID*** plus the characters **LS**. A representative contract number would be T3052LS or E2G53LS. After the regular projects and proposals are created and synchronized with the Financial Management System (FM), the tracking projects and their proposal header may be created with the copy special feature.

No other duplicate projects or proposals are to be added to the production environment of Trns•port, as they will produce quantity errors in some of the reports



Working with Proposals

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

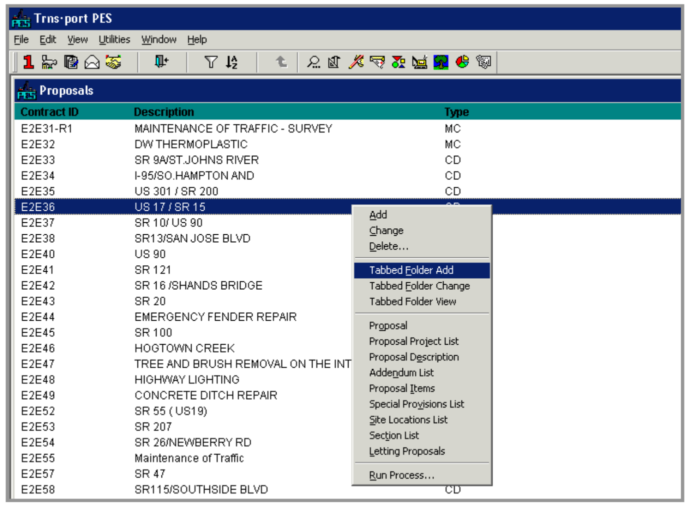
- Click the Proposal icon. 

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

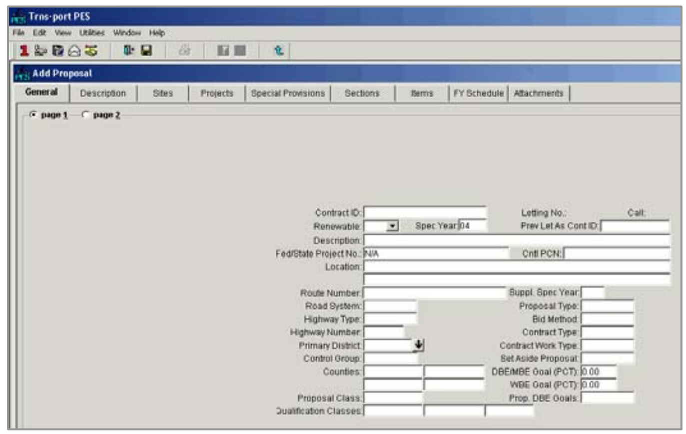
The Proposal Header

To create a new proposal,

- Rclick **Tabbed Folder Add**.



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

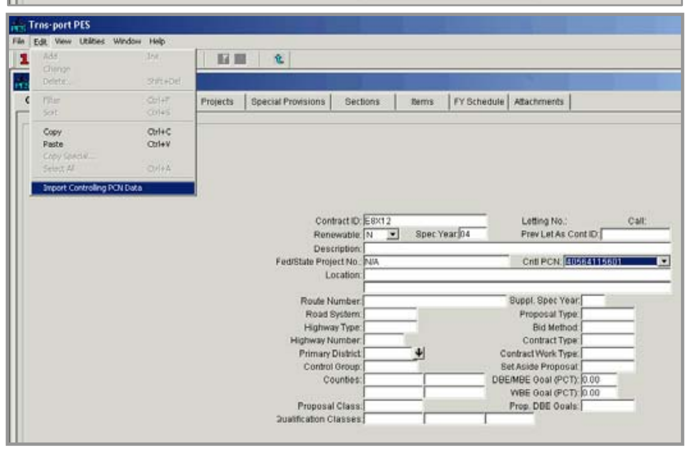


The General Tab

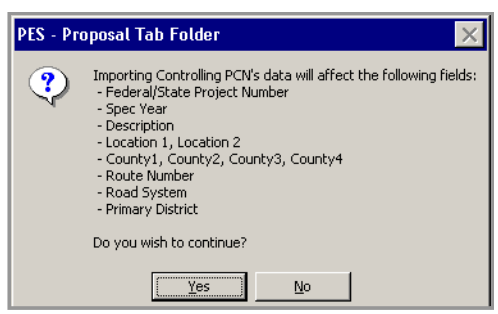
General Tab page 1

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

- Click ***Cntl PCN***.
- Click the appropriate ***Financial Project Number***, from the list box.
- From the Menu Bar, Click **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***.

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. If a contract is to be renewable, add the suffix **–R0** to the contract ID

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

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

Description	*Prev Let As ContID*	***Federal/State Project Number***
Contl PCN	***Spec Year***	***Proposal Type***
Contract Type*	***Bid Method***	***Primary District***
Managing District.	***Contract Work Type***	***Control Group***
Counties	***Proposal Class*****	***Qual Classes******

***Contract Type**. The code table for this field has been restructured as follows.

Construction Contracts

CC	Construction Contract
CCP	Construction Contr Private Partnership
CDB	Construction Design Build Contract
CEC	Construction Emergency Contract
CFR	Construction Fast Response Contract
CHW	Construction Hold Witness Contract
CLS	Construction Lump Sum Contract
CPB	Construction Push Button Contract

Traffic Operations Contracts

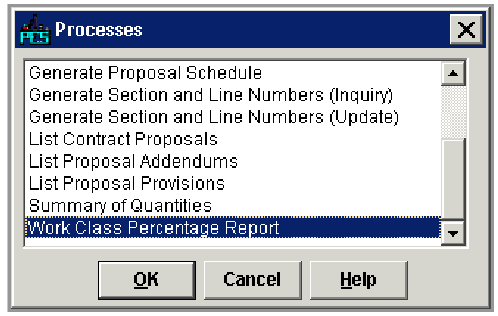
TO	Traffic Operations Contract
TOPB	Traffic Operations Push Button Contract

Maintenance Contracts

MAM	Maintenance Asset Management
MC	Maintenance Contract
MCS	Maintenance Contractual Svcs Contract
MEC	Maintenance Emergency Contract
MG	Maintenance Grant

MMOA Maintenance Memorandum of Agreement
MPB Maintenance Push Button
MPO Maintenance Purchase Order

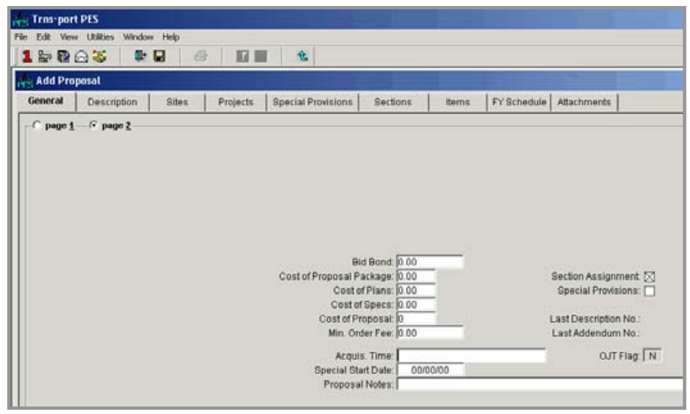
** **Proposal Class** and *** **Qual Classes.**



Run the Work Class Percentage Report to find the values for these two fields. Use the highest percentage classification, (other than MOT or Other) for the Proposal Class. Use the three highest (other than MOT or Other) for the three Qual Class fields. This step will need to be performed when the estimate for the proposal is essentially complete.

When page 1 is complete,

- Click the page 2 radio button located in the upper left corner of the General tab.



General Tab page 2

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

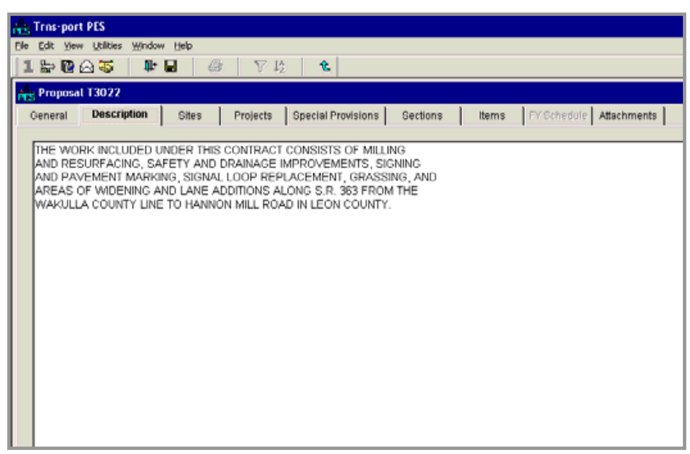
  Bid Bond (0)

  Cost of Proposal Package

  Section Assignment ***Cost of Plans***

  Cost of Specs ***Cost of Proposal*** *Acquis. Time*

  Special Start Date *Proposal Notes*



The Description Tab

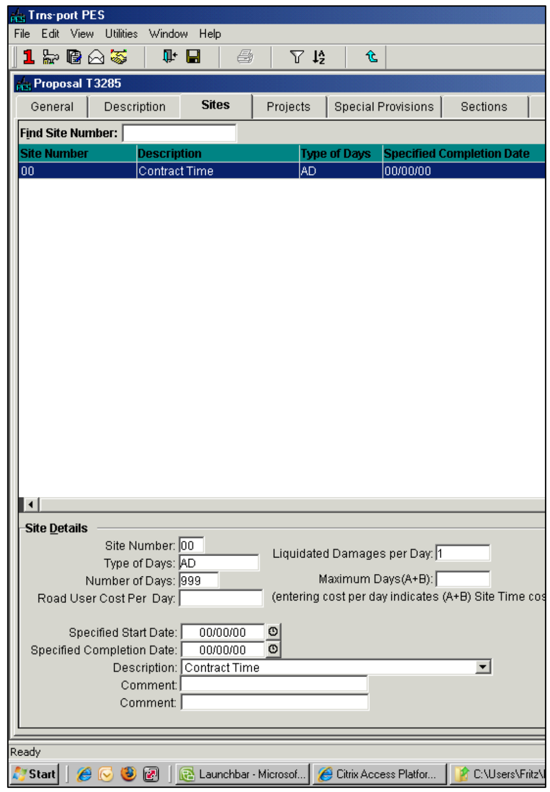
The description for the proposal. It can appear on proposal-related reports, such as the notice to bidders. This field should be a general description of the work, where it is located, and any unusual aspects that should be made known.

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 up to 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 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 first 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.

- For each ***Site*** record fill each field as appropriate.

  Site Number Type of Days
  Liquidated Damages per Day
  Number of Days
  Specified Start Date
  Specified Completion Date
  Description

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 Liquidated Damages will be handled in SiteManager.

When the Site Information is complete,

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

Alternative Contracts

As noted above, the Site Tab information transfers to SiteManager and may be used for a variety of ends including Contract Time, Daily Rates, Incentives and Disincentives, and administrative information.

The Site Tab contains a field named ***Road User Cost Per Day.*** This field is to remain **blank** unless the proposal will be processed under Alternative Contract procedures, in which case it will be filled as described below. When ***Road User Cost Per Day*** contains a value, the particular Site will be used in the analysis of bids to determine the successful bidder.

For Time Bid contracts there are three items of information to be retained from the preconstruction work. These are:

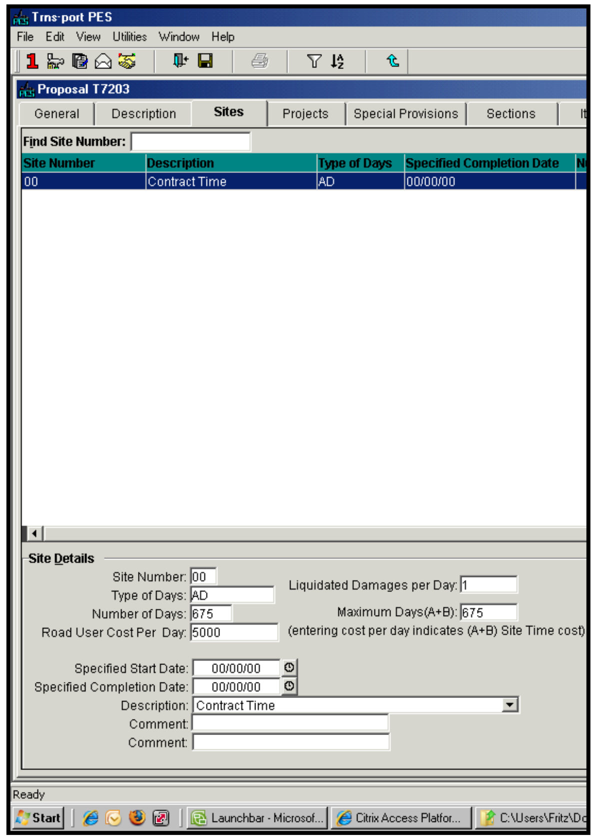
- ❖ The engineers estimated duration for the Contract Time or Lane Rental period.
- ❖ The maximum number of days that bidders may bid for the Contract Time, or for the Lane Rental period.
- ❖ The Road User Cost per Day.

A + B Contracts

At the General tab,

- Select the appropriate Type in the **Bid Method** field.

At the Sites tab enter data in the following manner.



- ***Site Number*** Use the default value of **00**.
- ***Liquidated Damages per Day*** There is a default value of $1.00. **Do not change this value**. Liquidated Damages will be managed in SiteManager.
- ***Type of Days*** Choose AD in the drop down menu. This is the default value for construction contracts.
- ***Number of Days*** Enter the Engineers estimated duration for the contract.
- ***Road User Cost Per Day*** Enter the daily rate determined for the contract.
- ***Maximum Days*** Enter the maximum number of days that will be indicated in the Contract Specifications.
- ***Description*** Enter "Contract Time" from the SITEDES code table choices.
- Click **OK** to save the record to a data row**.**

During the analysis phase of the bidding, in conjunction with the bids on Pay Items, the value contained in the ***Road User Cost Per Day*** times the ***Number of Days*** identified for the site will be used to determine the successful Bidder**.**

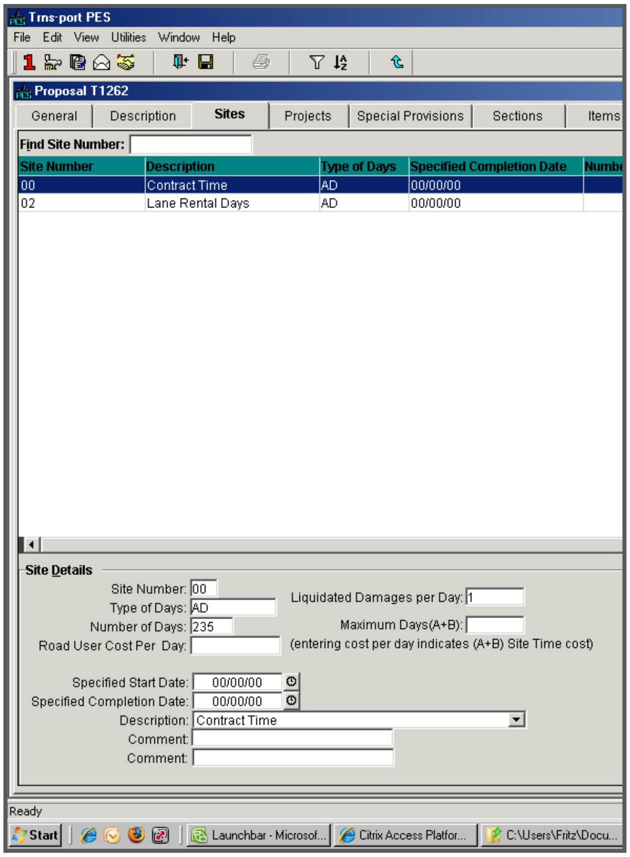
Lane Rental Contracts

At the General tab,

- Select the appropriate Type in the **Bid Method** field.

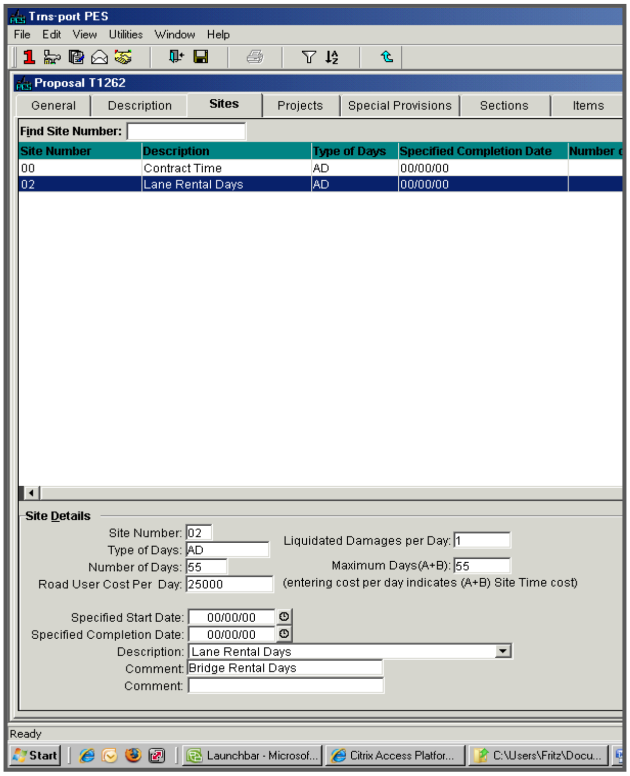
At the Sites tab create a Site 00 for the contract time in the usual manner then create additional Sites as described here.

- Rclick in the white space of the Sites Tab
- Click **Add** to create a new record.



Enter information in the following fields:

- ***Site Number*** Use one site for each instance where lane rental is to be managed in SiteManager. Begin with **01**.
- ***Liquidated Damages per Day*** Enter the value identical to the *Road User Cost Per Day* to be entered below. This field will transfer to SiteManager as a Disincentive amount.
- ***Type of Days*** Choose CD in the drop down menu from the TIMMETH code table.
- ***Number of Days*** Enter the Engineers estimated duration for the lane rental time.
- ***Road User Cost Per Day*** Enter the daily rate determined for the particular Lane Rental activity.
- ***Maximum Days*** Enter the number of days that will be indicated in the Contract Specifications. (the Maximum days).
- ***Description*** Enter "Lane Rental Days" from the SITEDES code table choices.



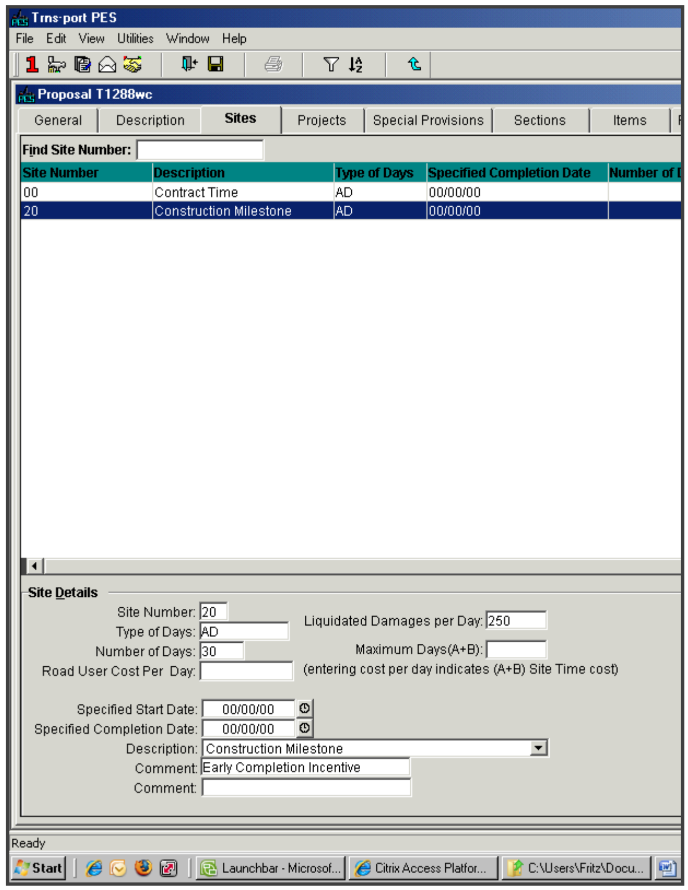
- *Long Description 1* If there is more than one instance of lane rental on the contract, describe the particular location here.

- Click **OK** to save the record to a data row**.**

During the analysis phase of the bidding, in conjunction with the bids on Pay Items, the value contained in the ***Road User Cost Per Day*** times the ***Number of Days*** identified for the ***Site*** will be used to determine the successful Bidder**.**

Construction Milestones

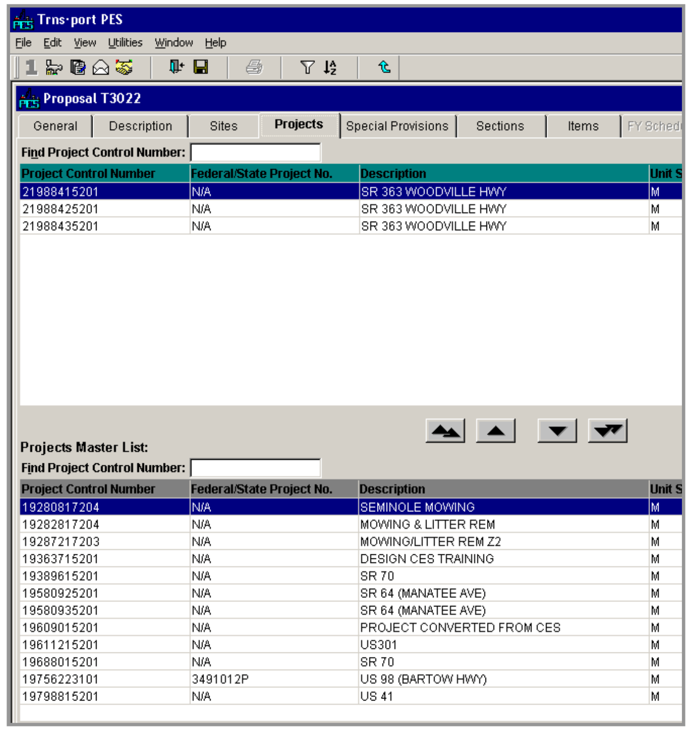
For general Construction Milestones either with or without Incentives and Disincentives, create a Site 00 for the contract time in the usual manner. Then create additional Sites as described here. Enter data on the Site Tab in the following manner.



- ***Site Number*** Use one site for each instance where a milestone is to be managed in SiteManager. Begin with **Site 20**.
- ***Liquidated Damages per Day*** If there is an incentive for the Milestone, enter the value. This field will transfer to SiteManager as a Disincentive amount. The Incentive value will be entered in SiteManager. Otherwise enter **zero**.
- ***Type of Days*** Choose CD in the drop down menu from the TIMMETH code table.
- ***Number of Days*** Enter the number of days associated with the particular Milestone. *Specified Start Date* and *Specified Completion Date* may be used in conjunction with this duration.
- ***Road User Cost Per day*** Leave this field **blank**, as the Site is not to be associated with determining the successful bidder.
- ***Maximum Days*** Leave this field blank.
- ***Description*** Enter "Construction Milestone" from the SITEDES code table.
- ***Long Description 1*** Describe the particular milestone here. This field may contain up to 60 characters.
- Click **OK** to save the record to a data row.

The Projects Tab

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 ***Pay Item 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 ***Pay Item 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 ***Pay Item 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 ***Pay Item Year***, ***Unit System***, with respect to 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 to be added. Highlight multiple projects by holding down the **CTRL** key while selecting the needed projects. After selecting the projects to add

- Click the single up arrow in the center of the window.

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

The Special Provisions Tab

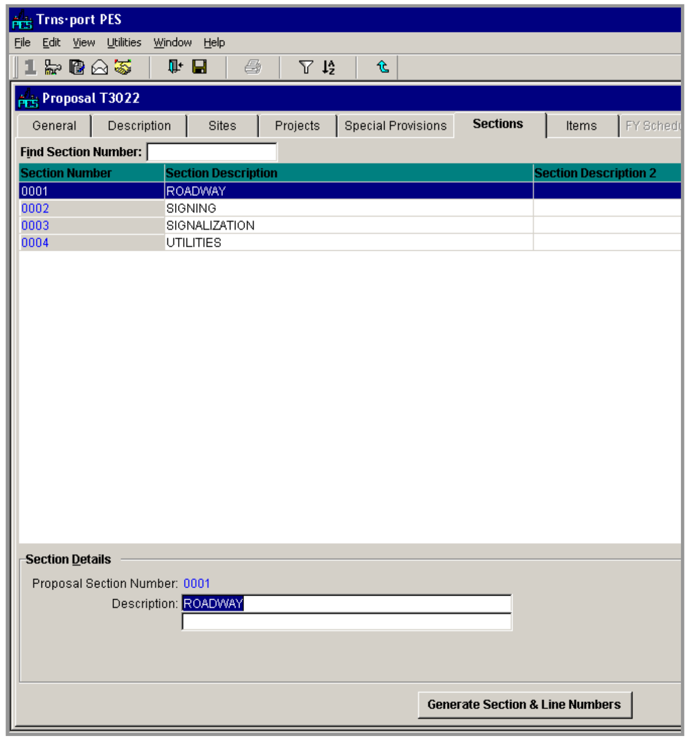
The Special Provisions tab features of Trns•port are not being used at this time.

The Sections Tab

At 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 (Structures –0100 or Roadway – 0200), and in some cases, will need to be changed to reflect the total project.



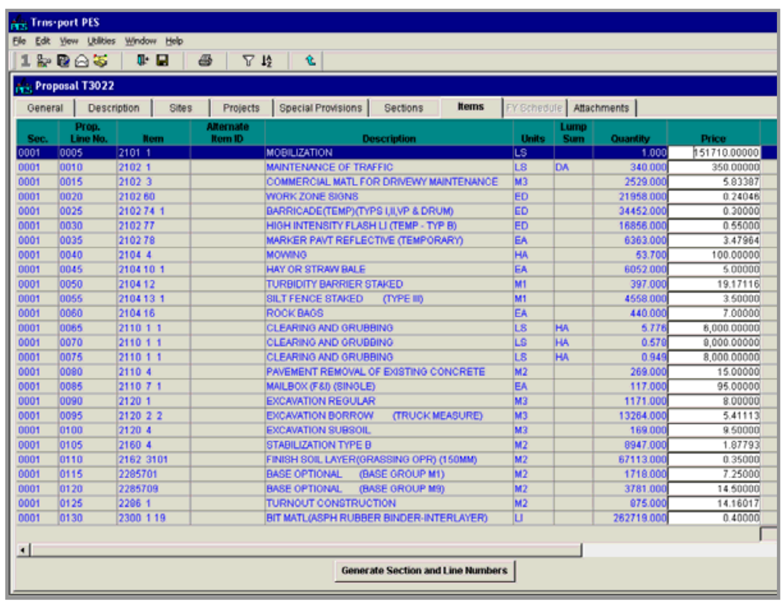
To add a section to the proposal,

- Rclick **Add**. Trns•port will add a blank row to the list of sections.
- Enter data into the blank fields displayed in the detail area of the Sections tab page.
- Enter a proposal section number and a description.
- Click **OK** to add a proposal section, **ADD MORE** to add another section, or **CANCEL** to return to the Proposal Sections list without adding a new section.
- Before leaving the tabbed folder window, save all changes to the database by selecting Save from the file menu or choosing **SAVE** when closing the window.

The Proposal Items Tab

The estimated prices may be changed in the 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.

If quantities are to be changed, they must be changed in the proper project.



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.

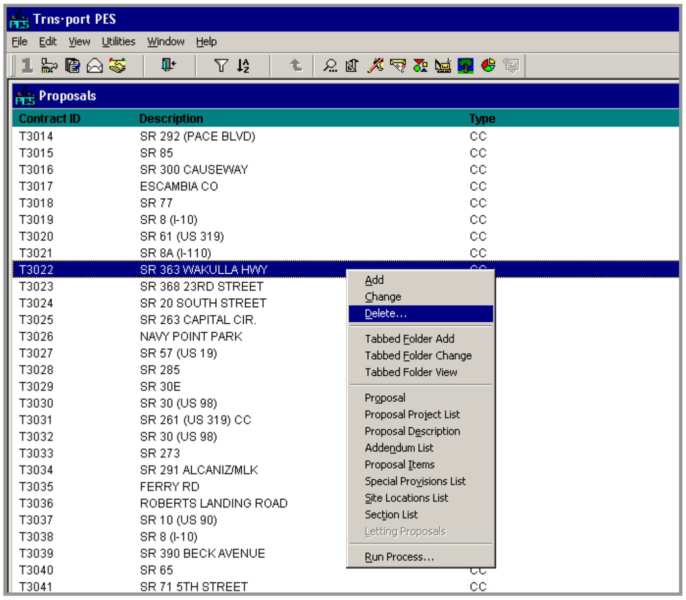
Deleting Proposals

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). The Trns•port LAS data for those proposals will not be accessible.

To delete a proposal:



- Rclick the proposal(s) in the Proposals List window.
- Click **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 warning 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

District Let Contracts

When the proposal is complete and ready to transfer to the district contracts office, open the Proposal Header and change the ***Access Control Group*** from **CD##** to **CL##.** At the same time open the project headers of all associated projects and change their ***Control Groups*** to **CL##**. The district contracts office will then initialize the proposal in LAS and prepare the advertisement documents.

Central Office Let Contracts

When the proposal is complete and ready to transfer to the central office, open the Proposal Header and change the ***Access Control Group*** from **CD##** to **CC##.** At the same time open the project headers of all associated projects and change their ***Control Groups*** to **CC##**. After initial processing in the State Estimates Office, the proposal and project ***Control Groups*** will be changed to **CT**##. The 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. An Addendum, may include adding Items, changing existing items, or deleting items. The items may be in the same or different categories.

Remember that it is very important to accurately assign Project Line Numbers and Proposal Line Numbers to each Addendum Item to be added. You will need copies of the proposal level Preliminary Detailed Estimate, the Proposal Schedule, and the Generate Section and Line Numbers (Inquiry) reports to do this accurately.

To add an addendum to a proposal

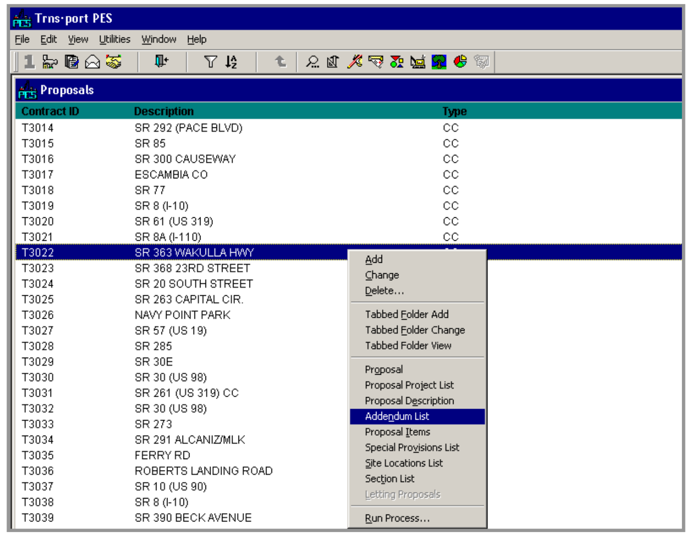
- Create an addendum header
- Specify the project, category, and line numbers (Project & Proposal) for each proposal addendum Item.

Re-initialized the Proposal to transfer addendum information from Trns•port PES.

Creating the Addendum Header Record

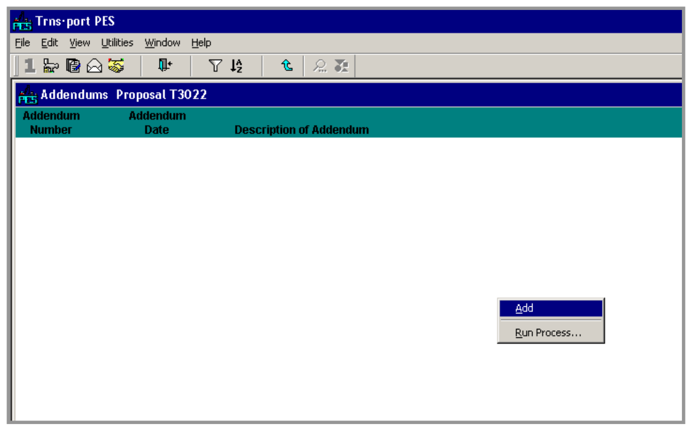
To create the addendum header:

- Click the affected proposal in the Proposals List window

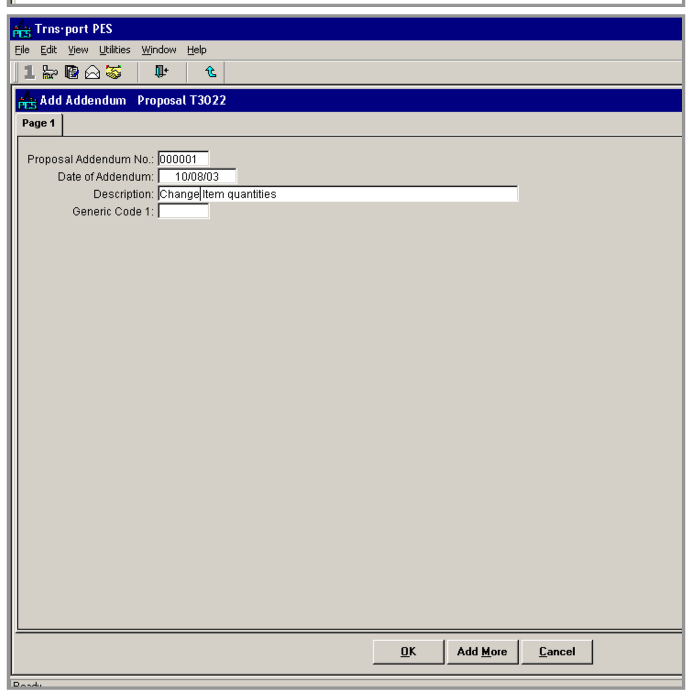


- Rclick **Addendum List**.

- Rclick **Add.**



The Addendum Header Detail window.



- Enter information for the following fields:

  Proposal Addendum No.

  Date of Addendum

  Description

When the addendum detail is complete,

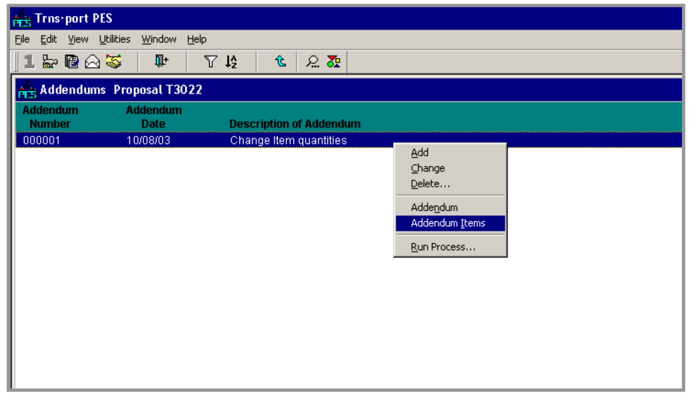
- Click **OK** to save the record, **ADD MORE** if adding another addendum header, or **CANCEL** to return to the Addenda list window without adding an addendum.

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.**
- With the Item list blank, place the cursor in the white space and



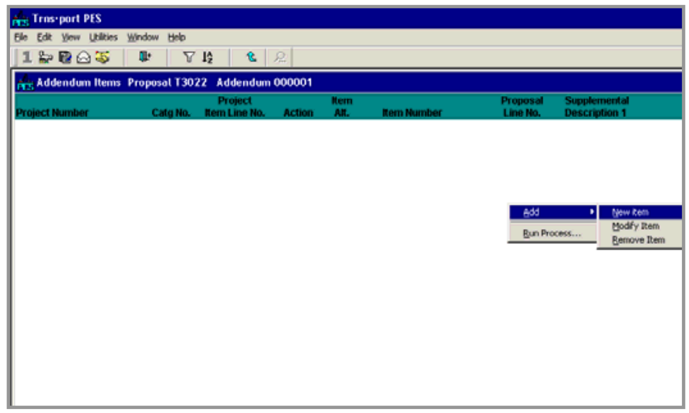
- Rclick **Add**.

Select from:

- New Item
- Modify Item,

  or
- Remove Item

Choose the appropriate action and proceed as indicated below.

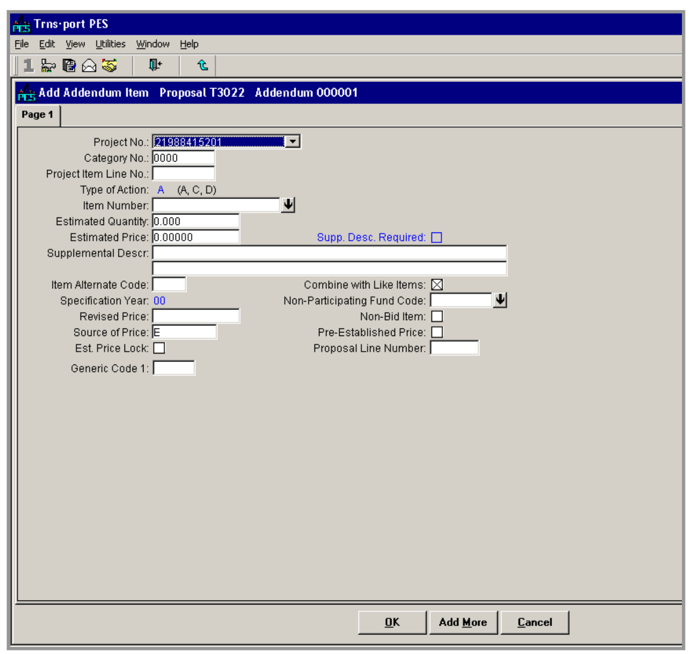


Adding New items

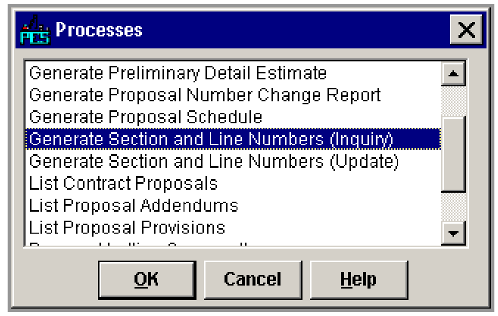
The Add Addendum Item Detail window will open.

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.** 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.
- Enter the ***Quantity*** for the added Item.
- Assign a ***Proposal Line Number*** that **does not** already exist on the proposal, unless it is to combine with existing Project Line Numbers. Recall that the Proposal Line Numbers are initially assigned in steps of five. Examine a copy of the Proposal Schedule and determine where the Item should be displayed, and assign an appropriate number.



- Click **OK**.

Or

- **ADD MORE** if other items are to be added.

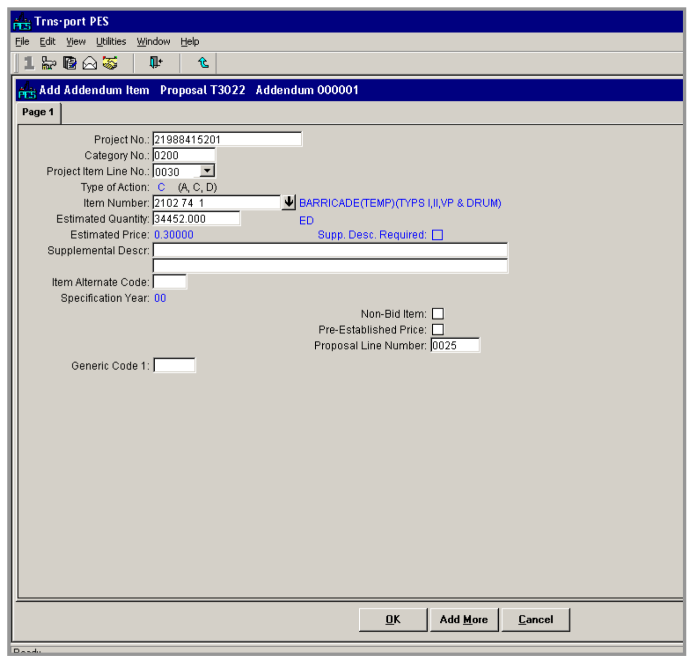
Modify Existing Items.

If the addendum is to modify one or more Items,

- Click **Add > Modify Item**.

Proceed sequentially to:

- Click the ***Project Number*** from the list box.
- Click the ***Category Number***.
- 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,

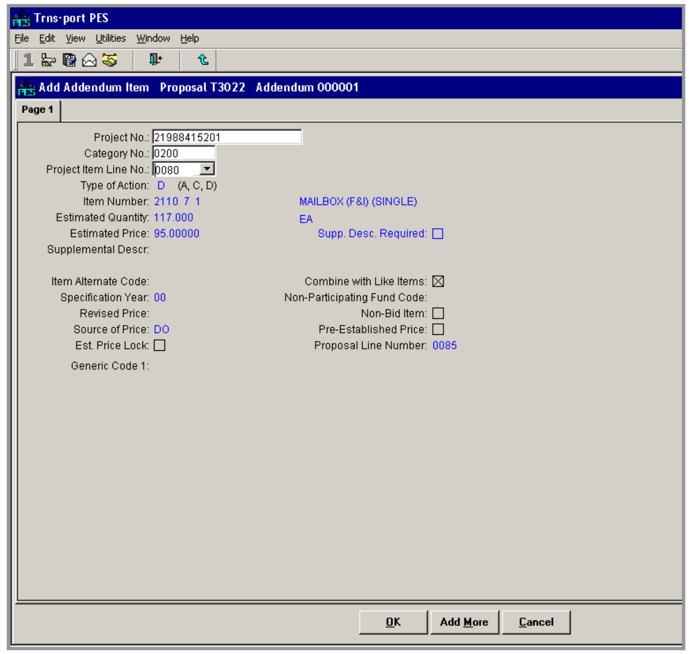
- Click **Add** > **Remove Item**.

Then, in sequence select:

- ***Project Number*** from the list box
- ***Category Number*** from the list box
- ***Project Item Line Number*** from the list box.

The deletion is now fully detailed, as all other fields on the window are blue.

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-opened. To do this,

- Click the proposal involved from the Proposal List window.
- Rclick **Addendum List**.

To change the header information,

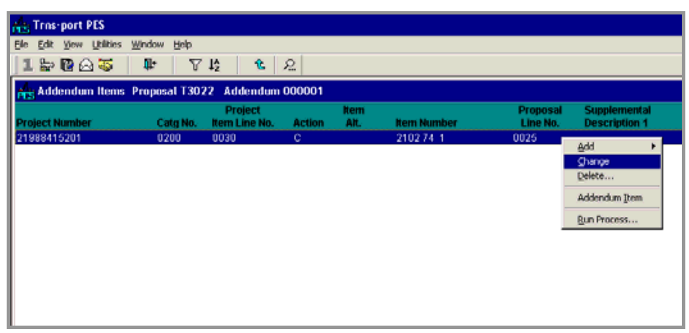
- Rclick **Change**, and make the necessary corrections.

If it is necessary 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**.

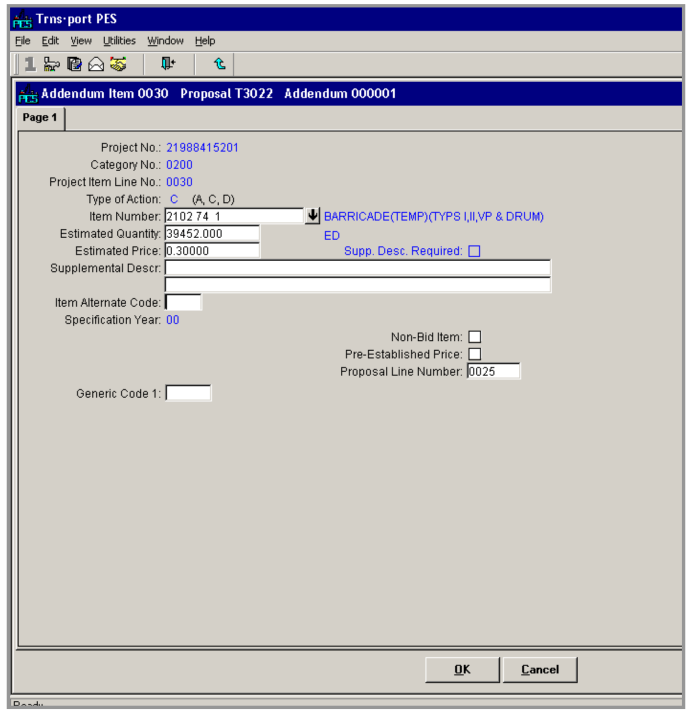


Several fields are now in blue, and cannot be changed.

- Change other information as necessary.
- Click **OK** to save the changes.

Or

- Click **CANCEL** to return to the Addendum Items List window without saving.



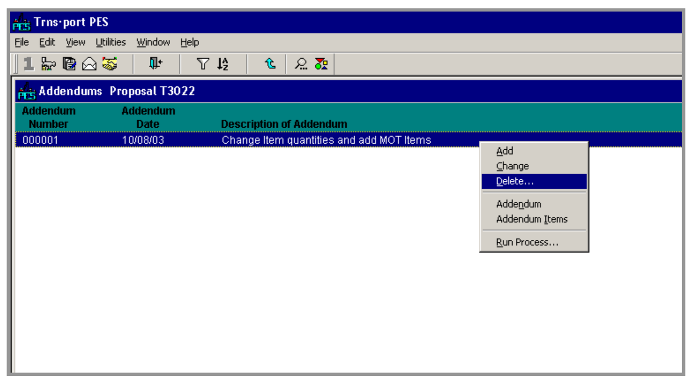
Deleting an Addendum

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. Also specify the proposal section number and proposal line Item number.

To maintain addendum Item information, select the addendum of interest 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 situation arises that bids are to be rejected and a contract is to be re-advertised the process will begin in the Contracts Office. Certain fields in LAS will be re-set to indicate that the bids are being rejected and the contract re-advertised.

The Old Proposal Header

Contracts Office

- Change the ***Access Control Groups*** of the **proposal and all associated projects** from **CL##** to **CD##**, or from **CT##** to **CD##**, as appropriate, so that the district estimator who created the Proposal Header will be able to update the projects and create a new Proposal Header for the new advertisement.

District Estimator

- 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 **CD##** to **CL##**, or to **CT##,** 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 any changes to the projects(s) that may be necessary. Particularly, if there were any addenda to the original proposal, enter all changes into the projects before re-advertising the proposal.

The New Proposal Header

- From the Proposals List window, 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 opens:
    - Go to the ***Cntl PCN***: field, and from the list box select the lead project.
    - From the Menu Bar, 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.
    - At the Projects Tab, 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.
    - 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.

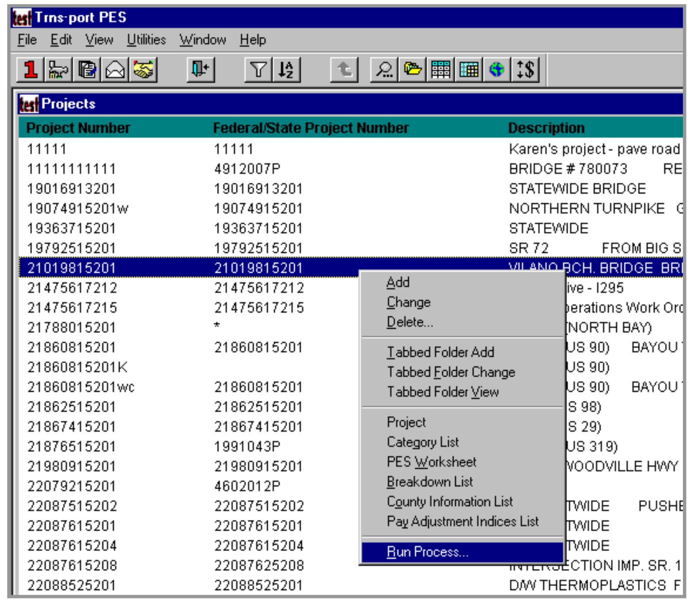
Running Processes and Printing Reports

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.

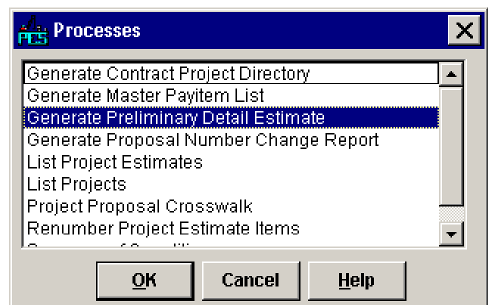
- Rclick the project(s) for which you want to generate reports in the Projects List window.
- Click **Run Process**.



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.

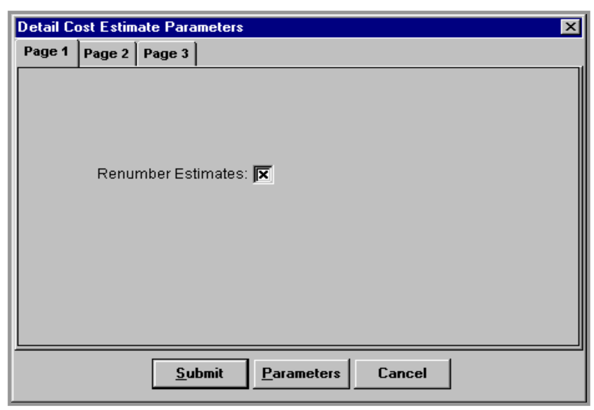
- Click **Generate Preliminary Detail Estimate**.
- Click **OK.**



Trns•port displays the Detail Cost Estimate Parameters window.

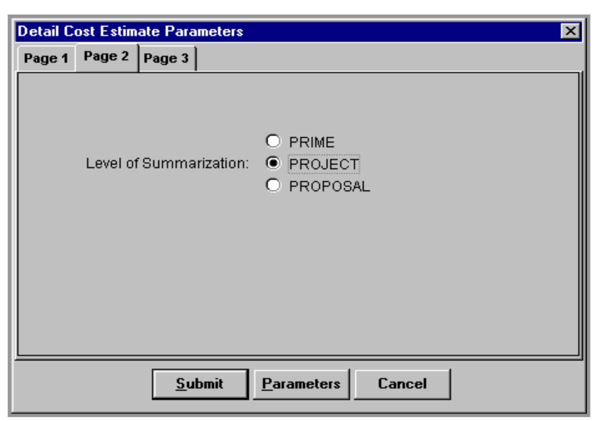
The parameter selection window, which has three pages. Page 1 shows a default selection to renumber the Item line numbers.

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

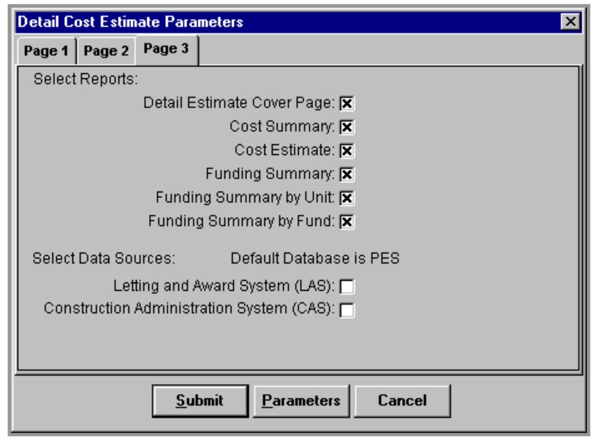


Enter the level of summarization on Page 2. This option determines whether to run the Detail Estimate for a project or proposal. The Department is not using prime projects.

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



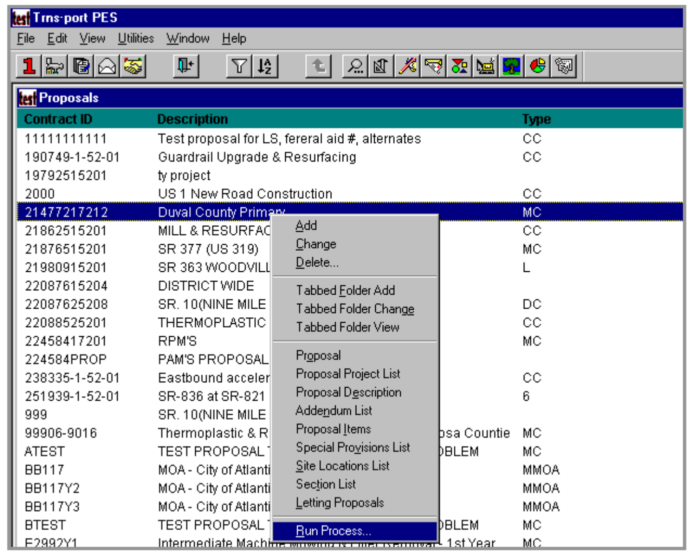
Page 3 shows the Parameters window, which allows selection of particular reports.



- Click the boxes of the desired.
- 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.

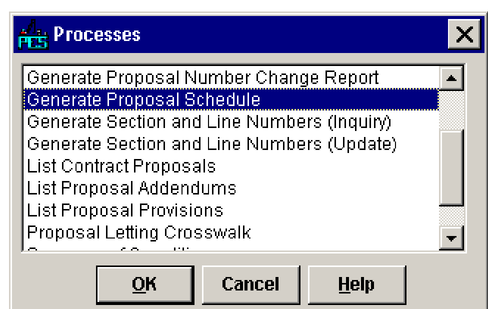
Proposal Level reports

To generate proposal schedules,



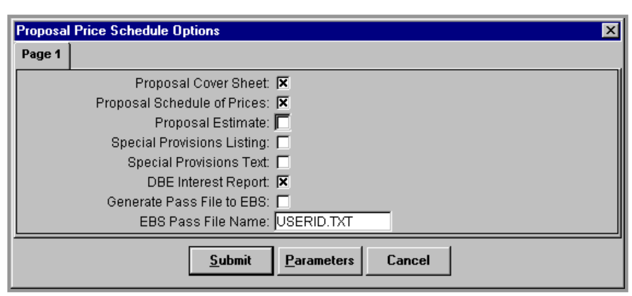
- Click the proposal in the Proposals List window.
- Rclick **Run Process**.

This will show 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.**

These 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 desired.
- Click **SUBMIT**

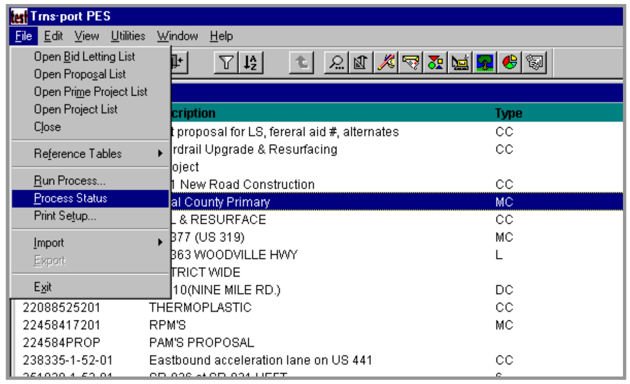
Two information windows will open to confirm that the process has been submitted and when it has completed running.

- Acknowledge both when they open.

Process Status

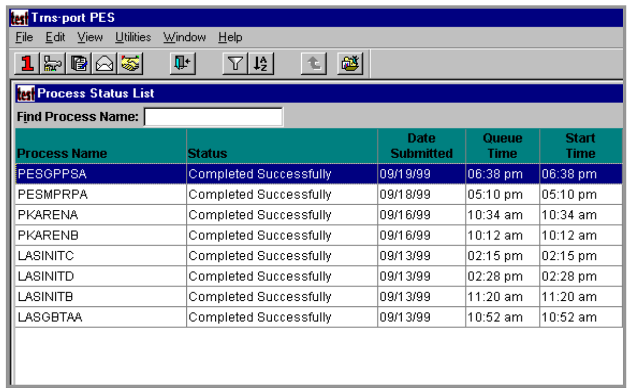
To see the results of this process,

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



This screen lists all of the processes recently run.

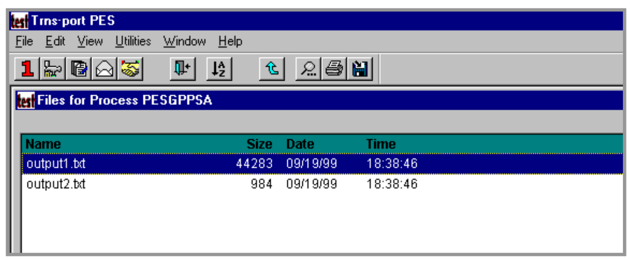
- Click the report just run (check the date and time columns),
- DblClick the blue band.



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

These are the reports available from this process.

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



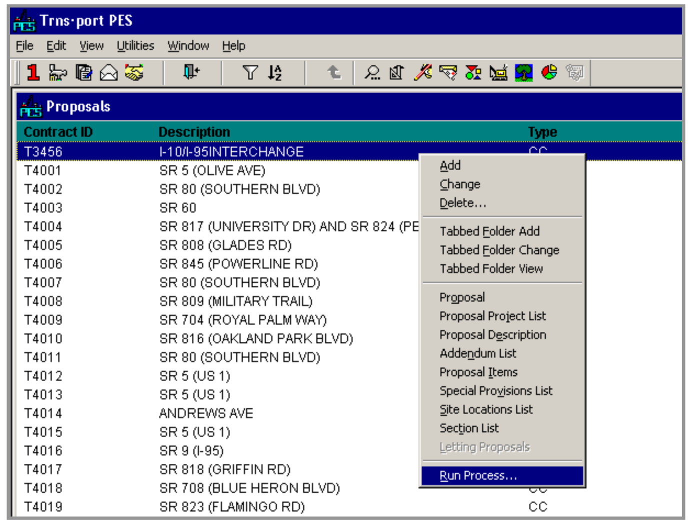
Name	Size	Date	Time
output1.txt	44283	09/19/99	18:38:46
output2.txt	984	09/19/99	18:38:46

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.

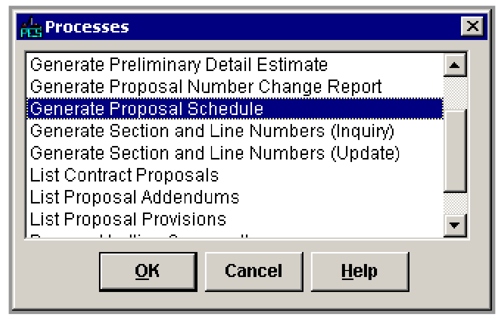
Creating the Proposal

Begin in the Proposals List window as seen here.



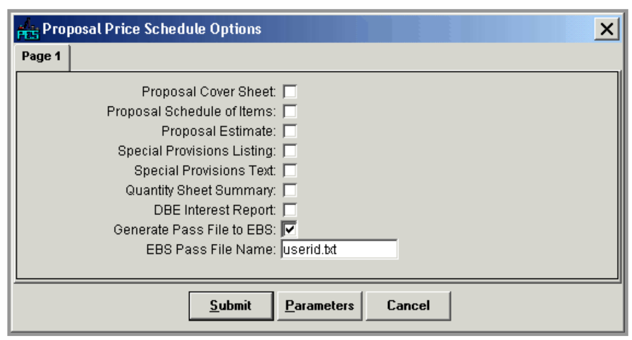
- Click the **Proposals(s)** to be prepared.
- Rclick **Run Process.**

- Click **Generate Proposal Schedule**.



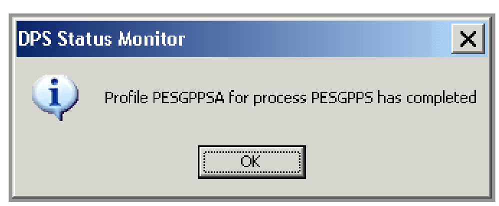
The Proposal Price Schedule Options window will open. It is the same window used to create a paper proposal schedule.

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

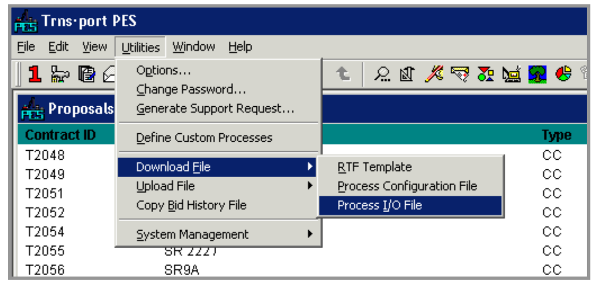


Wait until the Status Monitor reports that the process has completed. An electronic proposal flat file is now located on a Trns•port server.

- Click OK to close the window.



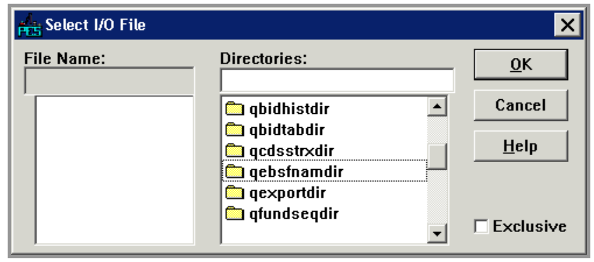
Download Files



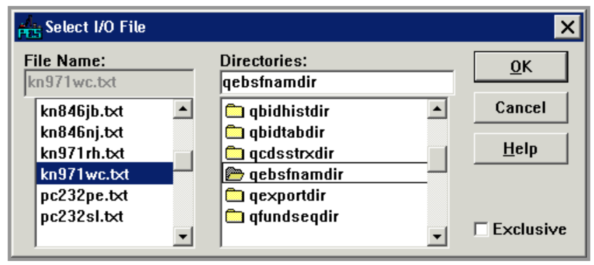
Download the file(s) from the Trns•port system and move them to a new location.

From the Menu Bar,

- Click ***Utilities > Download File > Process I/O File.***

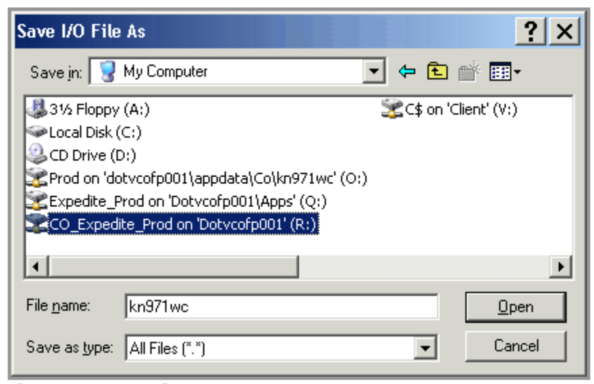


- DblClick the directory ***qebsfnamdir.***



In the File Name window,

- DblClick your ***userid.txt.***

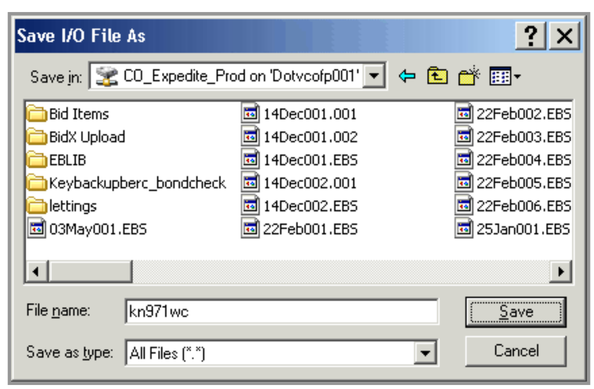


The Save I/O File window will open for you to choose file location and name. Click the Navigate Up  icon until you reach this screen:

For Central Office processing,

- Choose the folder labeled ***CO_Expedite_Sys on 'Dotvcofp001' (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.

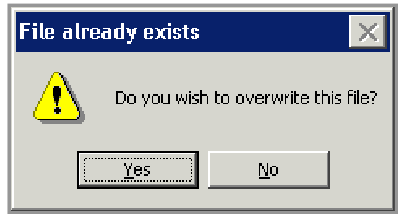


Caution: These next steps will copy the newest version of ***userid.txt*** and overwrite previous versions. Be sure that previous downloads of ***userid.txt*** have been processed by the Expedite **Gen** module, and the EBS files placed in their proper folders.

This screen will now open to accept the new file.

- Click ***Save***.

Next, you will receive this warning/confirmation message



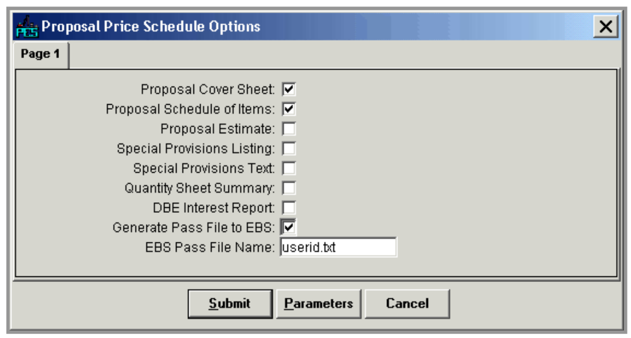
- Click ***Yes*** to overwrite the file.

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 addundum has been processed, run the **Generate Propsal 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**.

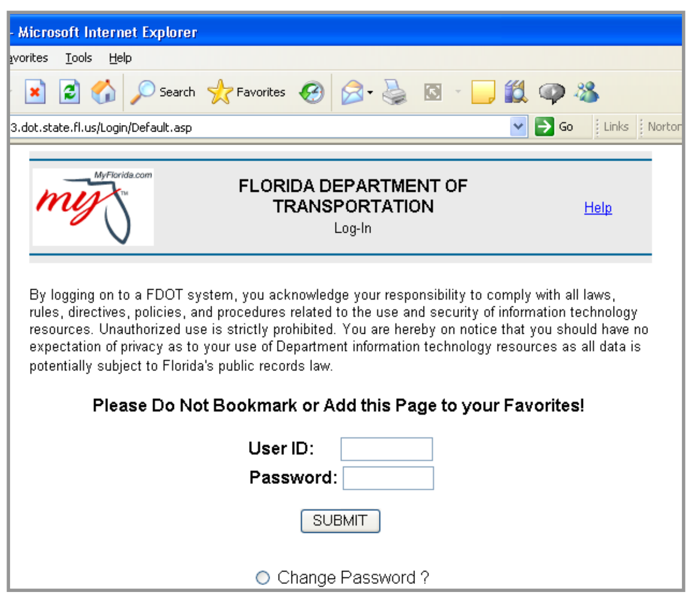
The remainder of the steps are the same as the creation of the original file above. After the **Gen** module in Expedite transforms the file for bidder use, an additional file for each addendum will be included.

Web Reports

In addition to standard reports within PES several reports have been created that are accessible from the FDOT Intranet. At the URL:

https://www3.dot.state.fl.us/TrnsportReports/default.asp

you will see this Log In screen.



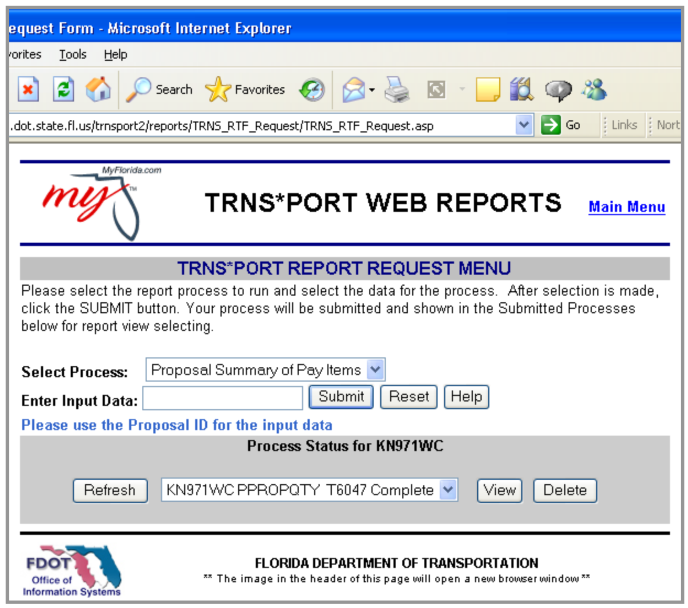
- Enter your user ID and Password

You will see a list of **Designer** and **Pre Letting Reports.** Depending on your access security, you may have a different list.

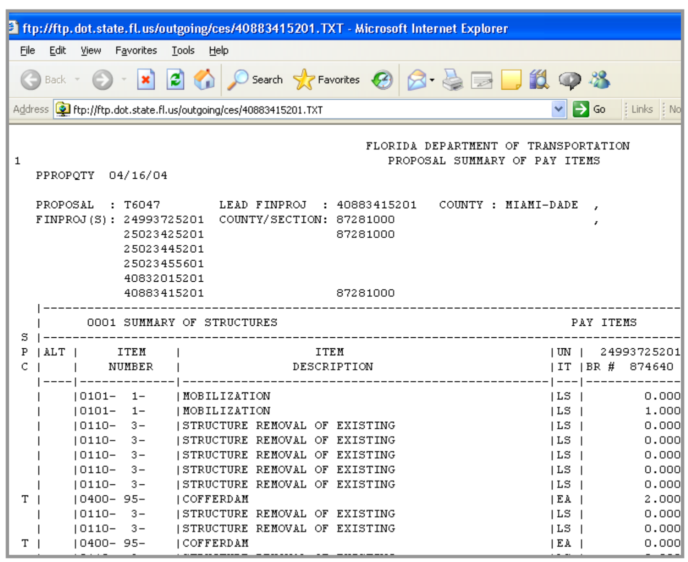
Proposal Summary of Pay Items

To run the **Proposal Summary of Pay Items**

- Click **Proposal Summary of Pay Items**
- Enter the **Proposal ID** in the Input Data field.
- Click **Submit**.
- Click Refresh after the report has time to run.
- Click View to see the report.



The report is seen at right.



Other report in this series are generated in a similar manner.

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 CD02PMA. With this Control Group assigned to the project, the District Estimator(s), having a personal Access Control Group of CD02*, 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 C* would have access to every project in the Production organization statewide.

For the management of projects for Central Office letting, the sequence of Control Groups assigned to the Projects and the Proposal Header when it is created, would be as follows:

- CD02PMA: When under the control of a District Project Manager.
- CD02: When control of the project shifts from the Project Manager to the District Estimator.
- CC02: When the District Estimator transfers the proposal to the Central Office for letting. A further refinement here will be decisions in the Central Office Estimates Office about compartmentalizing within itself. For example, a particular estimator may use CC02TW (initials) to assign the access to another estimator, or CC02A to have proposals shared by two or more Estimators as a group within the overall estimates office.
- CT02: When the proposal is ready for processing by the Central Contracts Office. It is necessary that the proposal Control Group remain unchanged while the project is in LAS and the Contracts Office in order to ensure that the Engineer's estimate is always under the control of only the estimator.

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.

	PES	**LAS**
District Contracts Manager	?L##*	?L##*
District Contracts Assistant A	?L##A*	?L##A*
District Contracts Assistant B	?L##B*	?L##B*
District Estimator	CD##*	CD##*
Assistant District Estimator	CD##A*	CD##A*

	PES	LAS
District Production Director	CD##PM*	None
District Production Project Manager A	CD##PMA*	None
District Production Project Manager B	CD##PMB*	None
District Project designed by Consultant Firm	CD##T###	None
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

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 Office L = District Contracts 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.
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.

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

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:

Construction Project

Receive Production Project from FM	CD##
District reassigns project internally	CD##A (or other subset)
Or	
District reassigns to consultant firm	CD##T365 (or other subset)
Pass file to District Estimator	CD##
Create Proposal Header	CD##
Pass to District Contracts office	CL##
Contracts Office processing	CL## (or subset if desired)
Pass to Distr Estimator for Bid Analysis	CD##
Return record to Contracts office	CL##
Complete award and execute phases	CL##

Or for Central Office let contracts

Pass file to District Estimator	CD##
Create Proposal Header & Price Job	CD##
Pass to Central Estimator	CC##
Pass to Central Contracts Office	CT##
Pass to Central Estimator for Bid Analysis	CC##
Return record to Contracts office	CT##
Complete award and execute phases	CT##